

## The Microsoft Utilities Industry

Microsoft is an industry leader in more ways than one. As the prime purveyor of "software that almost works," Microsoft has spawned an entire industry of utilities dedicated to making its products work, or work the way users would like. These utilities fall into several categories: fixing security issues, filling gaps, fixing things that just didn't really work, and add-ins that make Word and other products more workable, in particular in the legal industry. The last issue of the Newsletter dealt with some of the security questions, this one reviews some of the best utilities and patches that are available for what Word guru Woody Leonhard refers to in his indispensable newsletter, as "certified Office victims."

### Utilities

Originally, utility programs were small add-ins that improved a particular function or made doing a particular task faster and easier. Utilities were more sophisticated versions of macros that end users or word processing departments might write for their own use. In fact, many of them were commercialized after having been written and modified by consultants based on the needs of their law firm clients. One of the classic early utilities was the "Envelope"

which made printing envelopes considerably easier starting with Word 97. This has been expanded and improved and is a part of Woody Leonhard's WOPR suite of utilities. Another common utility is a Bates Label utility (offered by Payne Consulting) that allows for the easy creation of Bates Labels. For more detailed information about this and other sources mentioned, see the list at the end of the article.

### Paragraph Numbering

For law firms, one of the main weaknesses of all versions of Word has been paragraph numbering. Despite improvements, this is still a source of contention. Lawyers want to do paragraph numbering the way they want to, not based on what Bill Gates thinks is best for them. So virtually every major utilities package includes a Paragraph Numbering utility (sometimes combined with improved Table Of Contents functionality) that let you do numbering the way you want to. While it is possible to do this natively in Word, the savings between a \$90 package and losing 5-6 billable hours trying—and failing—to do it yourself is substantial. The utility from KKLSoftware may be the best of the pack, but most other vendors have similar functionality available.

### Reveal Codes

For years, the cry of WordPerfect proponents when asked why it is a superior program has been "reveal codes." And in fact, WordPerfect uses the same coding model (streams of text with embedded codes) that has become the norm in the Internet and with the newer XML coding, and which is counterposed to the paragraph-based coding Word uses. Levitt & James has a program called "CrossEyes" that provides reveal code functionality for Word. It is not identical to WordPerfect functionality but is close enough so that a WordPerfect user can feel comfortable with it. \$79 per user for less than 25 users.

### Mailings

The Word merge function is neither very powerful nor flexible. In addition, the inte-

gration with Outlook, which you might expect to be very good since both are Microsoft products, has always been extremely iffy. The best functionality here is Woody Leonhard's package.

### Software Suites

Once you get past the issue of specific utilities to fix/improve specific aspects of the program, you get to the issue of more general packages. These will offer to provide letterhead, memos, fax cover sheets, and various specific mass-produced documents such as Certificates of Service, Affidavits, Notary Public statements, Caption Blocks for a variety of courts, and so on. The main contenders here are Soft-Wise, the Legalmacpac, templates offered by KKLSoftware and a template suite offered by Ross Kodner's Microlaw.

A well-designed and implemented suite of templates can be extremely effective in enhancing productivity. In addition, the makers will update and improve them, make them compatible with new versions of Word. However, to my way of thinking, these suites tend to have two drawbacks. The first is that since they are designed generically to be all things to all men, they tend to be somewhat bloated and clumsy.

The second problem is more philosophical, in that they tend to produce poorly-trained users. Thus, when a new issue or the need for a new template arises, no one in-house knows how to do it. These suites, in my opinion, tend to result in over-dependence on the consultant that implemented it, not to mention the typical 20% per year maintenance fee. I much prefer what I call "technology transfer," so that after installing a specific type of template or functionality, at least some users know how to maintain it and develop new items based on what already exists.

### Outlook

When faced with Outlook's massive vulnerability to viruses, Microsoft reacted by imposing "security" that makes it substantially more difficult for users and firms to function normally. Thus, in Outlook 2002, attempting to synch with 3rd party programs such as a PDA results in a popup saying that someone is acces-

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### About This Newsletter

Heckman Consulting is a systems integration firm specializing in the legal market. John Heckman has 20 years experience in the legal community and is featured as a "Top Tier Technologist" on [www.lawcommerce.com](http://www.lawcommerce.com). This newsletter is published periodically as a service to our clients and others. For back issues go to [www.heckmanco.com](http://www.heckmanco.com).

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## Utilities *(Continued)*

sing Outlook and how long do you wish to let them proceed (with a maximum of 10 minutes). Since you know this is happening (you started the synch after all), this is purely annoying and serves no purpose. In addition, Outlook now has a list of "banned" attachments, some of which your firm might wish to let through.

There are two fixes available for "popup hell." If you are using Exchange Server, there is a patch that lets the system administrator turn off the warning with certain restrictions. The second is a small utility called "Click Yes" which lets you disable the warning on a specific workstation.

As far as attachments are concerned, Ken Slovak has an indispensable free utility which lets you select what kinds of files you want to allow, instead of having to accept Microsoft's idea of what is good for you on an all-or-nothing basis.

### Conclusion

Not everyone needs the same set of utilities or templates. However, a judicious investment in specific utilities or template suites can reap tremendous benefits in terms of productivity. And if you tie them into document assembly routines using case management software or programs such as HotDocs, the benefits are even greater. ■

## Vendors of Microsoft Utilities

For a small number of users (1 to 10 or 20), individual utilities generally range from \$50 to \$100 per user. Macro suites

tend to be aimed at somewhat larger firms and tend to have a prohibitive initial buy-in for small firms. A major advantage is getting updates and revisions (usually at 20% per year of the initial cost).

**KKLSoftware.com.** These add-ins were developed based on years of experience working with major law firms by Kraft Kennedy & Lesser. They include utilities that allow routine administrative functions even from "locked down" PCs; a Metadata utility that also works with Excel and Outlook, which some others don't; a Word paragraph numbering utility, as well as a series of templates.

**Payneconsulting.com.** One of the leading Word consulting firms and the first one to release a program to clean Metadata out of Word. Authors of the must-have *Word 200x for Law Firms*. Metadata Assistant is available for \$79/user. An Enterprise edition is also available with pricing based on the number of seats. Also offers a Bates Label Maker and a Word Expense Form. The Numbering Assistant is \$65/user for up to 24 users.

**Softwise.net.** This template suite has been around for many years and has gradually expanded in functionality. A new version, based on SQL databases (or Access for smaller firms) called Innova, should be available by early March. For 1-100 users count on a total of \$200-225 per seat. Also has "Out-of-Sight," a metadata cleanup utility.

**WordTricks.** Database-based utility similar in nature to the new SoftWise product. Contact [www.wordtricks.com](http://www.wordtricks.com). Cost is \$180/seat for under 50 users.

**Legalmacpac.com.** Offers a standalone Paragraph Numbering tool, a Bates Label maker and both generic and customized series of templates, including Proof of Service, Verification Forms, Notary Forms, and Deposition Summary routines. Contact at [www.legalmacpac.com](http://www.legalmacpac.com). Marketed to medium to large firms; buyin for under 50 users may be prohibitive.

**LevittJames.com.** Maker of Crosseyes (\$79 per user), which produces "reveal codes" in Word. Also makes CrossWords, probably the leading (though somewhat pricy for less than 20 users) conversion package for documents from WordPerfect to Word (one-way only).

**Woody Leonhard.** Offers Woody's Office Power Pack at \$29.95 (or free if you buy his Using Office XP book) at [www.wopr.com](http://www.wopr.com). Contains the Enveloper (worth the price of admission all by itself), a file manager on steroids, a Popup Contacts list that makes inserting addresses from Outlook a snap.

**Ken Slovak's Outlook Attachment utility.** for Outlook 2000, SP 3 and above. See [www.slovaktech.com/attachmentoptions.htm](http://www.slovaktech.com/attachmentoptions.htm).

**Patches for Exchange.** Download the patch from [www.microsoft.com/office/ork/xp/appndx/appa11.htm](http://www.microsoft.com/office/ork/xp/appndx/appa11.htm). Note that this only works with applications that have a digital signature you can register with Exchange server. If you don't have a digital signature, then you have to allow access on an all-or-nothing basis.

**ClickYes.** does away with the Outlook popup. See [www.express-soft.com/mailmate/clickyes.html](http://www.express-soft.com/mailmate/clickyes.html). ■

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