

Technology eReport



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Features

- **Technology-Enabled Services: The Next Generation of SaaS**
How you can use them to increase your efficiency and profits without spending a lot of money.

Technology-Enabled Services: The Next Generation of SaaS

By Kevin Chern

Software-as-a-Service (SaaS) is a hot topic of conversation right now, as thought leaders in various industries debate the risks and benefits of moving computing into the cloud, but the arguments are largely academic. SaaS is here to stay. In fact, by the time the buzz over cloud computing really got rolling, most of us were already using it in some form or another, usually without having given much thought to the larger issues. One obvious example is the range of services offered by Google. While it may still be search that springs to mind at the mention of Google, tens of millions of Gmail accounts operate in the cloud. Yahoo!mail, Hotmail, and others operate similarly.

Early Gmail users were motivated, to a great degree, by the large amount of free storage space, but that was only the beginning. Google also offered messaging, live document sharing, and other services—all operating from, and storing data on, common servers that the end user never had to think about. Those services didn't appear to present a serious challenge to traditional software providers in the early days, but Google's recent push marketing its apps as an alternative to Microsoft products shows just how dramatically the industry has shifted in a few short years. Cloud computing is everywhere. Over the next few years, "SaaS" is likely to drop out of our vocabulary altogether, not because it's obsolete but because it's become the standard for software delivery and no longer requires distinction.



Where SaaS Ends and TES Begins

But SaaS is more of a launch point than an end result. SaaS standing alone is self-limiting. An SaaS provider generally offers the software, storage, and security, and the end user does the rest. SaaS platforms recently introduced for law firms tend to use a per-license pricing model, limiting the provider's revenue. That in turn limits available resources, and thus SaaS providers may face significant challenges in scaling support services to keep up with demand and enhancing functionality at the pace required to keep up with customers' feature requests. Those limitations may also create obstacles to integration with third-party service providers. Thus, end users need multiple interfaces or portals, forcing siloing of different activities in law firms and reducing efficiency. Even when the SaaS provider has the inclination and the resources to pursue integration, after-the-fact integration can be difficult and lead to compatibility problems.

Technology-enabled service (TES) picks up where SaaS leaves off, allowing service providers to leverage the benefits of cloud computing and build on them to offer more efficient, more cost-effective services. With TES, the technology is built to deliver the software and the service. The software is built around the most efficient delivery of services rather than introducing those services as an afterthought to an SaaS.

Law firm administrators may not immediately recognize the significance of TES when choosing a service provider. After all, the firm is interested in the services delivered and the cost of those services, not what goes on behind the scenes. One key benefit to purchasing those services is precisely that the firm doesn't have to concern itself with the operational details. But TES does matter to the end user, for a variety of emerging reasons and probably some that have not yet emerged.

The TES Difference

The most obvious advantages include the basic benefits of SaaS—a TES provider takes advantage of shared resources and technological efficiencies to provide services more smoothly and at a lower cost. More significantly, though, TES providers can deliver services and information in a way that most of us wouldn't even have imagined just a few years ago. Consider, for example, the traditional model of a law firm answering service as compared with a TES.

With a traditional answering service, the firm typically manually transfers calls to the service, perhaps calling in to let the service know that calls are being transferred. The service takes messages and responds to calls according to the law firm's instructions. After lunch or the next morning, the law firm employee contacts the service to "pick up" messages and take back the calls.

A technology-enabled answering service, on the other hand, allows for much greater customization, real-time message delivery, and seamless handoff of calls, often at a lower price than traditional services can offer. Such a system may, for

instance, update a message-retrieval center and forward messages by email in real time, eliminating the need to call in for messages and allowing for instantaneous notification. Using integrated VOIP technologies, a technology-enabled answering service can transfer calls with a click, routing them to prepopulated telephone numbers based on time of day and automated workflows. That means not only quicker access to messages and calls but also lower employee costs on both ends through more efficient delivery and handoff. At the same time, digital phone recordings allow the end user greater monitoring abilities. The creation of a durable, accessible record of all messages permits multiple people in the firm to check messages, eliminating the time and risk involved in having to pass messages along.

Putting People in the Cloud

Similar efficiencies and safeguards may arise out of the use of technology in the delivery of nearly any service, and the greatest efficiencies and cost savings come about with the *integration of people into the cloud*. The very nature of operating within the cloud means that the options are wide open, and systems can be adapted to serve the needs of a particular industry.

For example, LiveOps takes advantage of thousands of work-from-home independent contractors to provide call center services for various companies. Because the LiveOps platform tracks performance and routes calls preferentially, the best-performing operators get the most work and the highest wages. Companies using the service don't have to concern themselves with hiring, training, or adjusting staff to fluctuating demand. Amazon's Mechanical Turk, on the other hand, allows users to post tasks, and those tasks can be completed by anyone in the world who is willing to work at the posted rate and can get the job done. There's no staff on hand at all, and yet there are potentially millions of workers available around the world.

The merging of people and technology in the cloud allows for a new level of adaptability at a lower cost than has ever been possible before. TES makes it possible for service providers to deliver an integrated, real-time experience in a variety of areas: answering services, virtual assistants, legal process outsourcing, website creation and hosting, Internet marketing, and others.

TES for the Law Firm Client

Dallas bankruptcy attorney Rustin Polk uses a technology-enabled bankruptcy case support service, which integrates bankruptcy petition preparation with the assembly of required products such as prebankruptcy credit counseling and client credit reports. One key benefit Polk points to is the ability to log in to the system and see everything that's happening in real time. "It's great, because I can literally watch as the work is being done," Polk said. "It's like looking over someone's shoulder."

That kind of access and ability to monitor in real time isn't just new to the virtual or outsourcing world—it's far more efficient than traditional internal oversight. Polk notes that the external technology-enabled service actually provides easier and more efficient access to the files he's monitoring. He can access all pending files in one place, rather than having to pull numerous separate paper files to track progress in his cases. Through this TES, Polk says, he has "been able to increase capacity by 50 percent while increasing profit by 25 percent," and rid himself and his staff of many of the headaches associated with scaling his practice.

Identifying the Right Provider for Your Firm

Identifying the right provider for your firm means asking the right questions of yourself and of prospective providers. First, determine what services are most critical to you and which you expect to integrate in the relatively short-term. When you know what you want, do your homework on possible providers. Some questions you should ask include:

- If you are using an SaaS, does it have an open API that will facilitate integration of third-party services?
- Does the provider currently have plans for services to be plugged in to the platform?
- What are the planned services, and in what time frame?
- How will the platform or services help your law firm streamline or improve its processes?
- Is the platform or service (SaaS or TES) provided at a price point that makes sense for your firm?

You'll also want to ask TES providers offering multiple services whether you can turn them on and off, or whether you'll be locked in to paying for services you may not use. A carefully selected SaaS platform or TES can fulfill the specific needs of your firm and increase your profits and efficiency without investment in hardware, increased staff, or other significant costs.

Kevin Chern is president of Total Attorneys, a leading provider of marketing and practice management services to small law firms, serving thousands of law firms nationwide. Previously he was managing partner of the country's largest consumer bankruptcy law firm. Under his direction, a staff of 180 employees in 19 states served approximately 450 new clients each week. Kevin also serves as president of Total Practice Management Association, which he founded to help members of the legal profession achieve greater work/life balance. He is also an author and a contributing writer to several legal blogs. He can be reached at kevin@totalattorneys.com.

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MacNotes

iPhone Software Update 3.0

By Jeffrey Allen

Apple recently released a free update to its iPhone software. The price does not reflect the value. Note that if you have an iPod Touch, the upgrade will cost you \$9.99, still a very good buy and easily worth the cost. The upgraded software brings significant new features to the party. For a full list of new features, visit Apple's iPhone website at www.apple.com/iphone/softwareupdate/. In addition to the new features incorporated within the operating system, the upgrade allows you to use the next generation of iPhone apps, designed to take advantage of the new capabilities of the iPhone and its operating system. (In some cases, the upgrade itself is not enough, as some of the new apps will not work on older

iPhones.)

Apple released its SDK (software development kit) for the upgrade to app developers some time ago, in order to allow them to develop new apps that could be made available in the App Store at the time Apple released the new software.

Highlights of the new features include:

1. **Cut and Paste.** The upgrade gives you the ability to cut and paste from one application to another. That means you can copy text from one document and insert it into another without having to retype it, a substantial improvement and great time-saver.
2. **Landscape keyboard.** For those of you who have found the portrait-oriented keyboard a bit too narrow for you to use comfortably, the new operating system allows you to rotate the iPhone and get a wider, easier-to-use keyboard in landscape perspective.



3. **Improved Calendar Functions.** In addition to your own calendars, you can now subscribe to the calendars of others in your office, your spouse, children, friends, and so forth and have them update through MobileMe. One of my biggest complaints about the calendar app prior to this upgrade is that my assistant could not get my calendar on her iPhone. She could subscribe to it through MobileMe and get it on her computer; but she could not get it on the iPhone. Now she can, and life is that much better!

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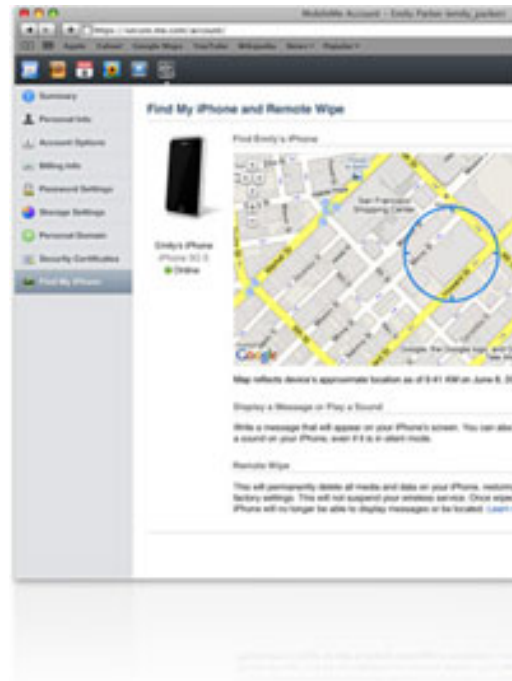
Calendar



Voice

Pictures courtesy of Apple Computer, Inc.

4. **Spotlight Search.** Spotlight has come to the iPhone! Just as it does on your desktop or laptop computer, it can search the entire device (including information in your apps). This is a much better way to find a contact, an appointment, or any other piece of information. A very good addition to the iPhone's functionality.
5. **Find My iPhone.** If you have GPS capabilities in your phone, the new system will help you locate a misplaced phone. It is not perfect—if you lose it in your house, it will not tell you that you left it in the bathroom or the kitchen or the garage. On the other hand, if you left it at the office and search for it, it will let you know that it is in the neighborhood of your office as opposed to your house or at the courthouse. To locate the phone, you need to log onto your MobileMe account and tell it to find the iPhone. It will display a map showing the general area where the iPhone is. Once you get close to where you left the iPhone, you can have it play an alert sound to help you find it. You can also have the display a message on the home screen identifying you and asking that it be returned to you. Most importantly, for data security purposes, you can do a remote wipe of the phone's memory, restoring it to factory settings and a blank memory.



Please return message Map showing iPhone's location.
 Pictures courtesy of Apple Computer, Inc.

6. **Voice Control.** You can now talk to your iPhone and direct it to call a particular contact or play a song from your collection. These features may need a bit more refinement, but they represent a move in the right direction. The iPhone responds to my commands at least as often as my dog does, so things could be worse. I have not noticed that repetition makes any difference, so, unlike voice recognition to text software (or, for that matter, your dog), you cannot train it to get better.



Voice Control

Voice Memos

Pictures courtesy of Apple Computer, Inc.

7. **Voice Memos.** You can record your own comments, thoughts, ideas, conversations with others, meetings, classes, and so forth. The iPhone can multitask as the Voice Memo application will continue to record while you do other things, such as check your calendar, send a text message, surf the web, and so forth. You can store the recordings on the iPhone and even edit them with built-in software.



Pictures courtesy of Apple Computer, Inc.

The new software also gives you the potential to use your iPhone as a tethered Internet connection for your computer. For the time being, however, you cannot use that feature in the United States because AT&T does not yet support it. Undoubtedly, that will come in the future, once AT&T figures out the pricing plan for such use. Count on the fact that it will not be in the "all you can eat" plan that now comes with the iPhone.

A feature that you can make use of comes from a new App released by Apple to work with the new system. The iDisk App allows you to access your iDisk from your iPhone and view files that you have stored on your iDisk on your iPhone.

You probably already know that Apple released the 3GS iPhone shortly before the new software came out. I am using the 3GS these days and have perceived an improvement in the GPS functionality. I have not yet determined whether that results from the software upgrade or a hardware improvement in the new phone, or a combination of both. If you have a 3G iPhone, and an upgrade available to you so that you can get the 3GS at the discounted price, you may want to do that. If you don't have the available upgrade, you may want to skip the 3GS and wait for the next iteration. The 3GS offers some improvements over the 3G, but they are not earthshaking. If you have an earlier generation of the iPhone, you may not know it yet, but you *really* want to upgrade to one of the newer models. Many of the new apps coming out will not work with the older models of the iPhone, and the newer hardware is slimmer, lighter, faster, has more available memory, and is just all-around better than the older hardware.

In the rumor department, several readers have asked me about the rumors relating to Apple releasing a netbook. Yes, I have heard those rumors too. While I have joked about the MacBook Air being Apple's answer to the netbook, I have no inside information to share with you about the release of a smaller, lighter, and

less costly netbook. I will, however, share with you the best rumor I heard on the subject (“best” meaning the one that actually made the most sense to me). That rumor was that Apple would release a larger version of the iPod Touch some time prior to the end of the year. The rumor I heard was a 6" screen and a \$599 or \$699 price point. My rumor had no information as to the amount of memory, but if this release happens, I would guess at a minimum of 32GB and possibly as much as 64 GB (or maybe two models with the ability to choose). Now, here’s the deal— if Apple comes out with a new netbook that looks something like what I described, remember, you heard it here. On the other hand, if Apple does not come out with a new netbook or comes with a netbook in a different configuration, remember that I told you not to put too much stock in rumors— especially when they relate to products that Apple supposedly will release.

Jeffrey Allen is the principal in the law firm of Graves & Allen with a general practice that, since 1973, has emphasized negotiation, structuring, and documentation of real estate acquisitions, loans and other business transactions, receiverships, related litigation, and bankruptcy. Graves & Allen is a small firm in Oakland, California. Mr. Allen also works extensively as an arbitrator and a mediator. He serves as the editor of the [Technology eReport](#) and the Technology & Practice Guide issues of [GP Solo Magazine](#). He also serves on the Board of Editors of the *ABA Journal*. Mr. Allen regularly presents at substantive law and technology-oriented programs for attorneys and writes for several legal trade magazines. In addition to being licensed as an attorney in California, Jeffrey has been admitted as a Solicitor of the Supreme Court of England and Wales. He is an associate professor at California State University of the East Bay and the University of Phoenix. Mr. Allen blogs on technology at www.jallenlawtekblog.com. You can contact Jeffrey via email jallenlawtek@aol.com.

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SurvivingEmail

Could Google-Hosted Mailing Lists Make Real Money?

By jennifer j. rose

April Fool's Day had rolled around, and it was time for Virgin Islands lawyer Andy Simpson to play his usual prank.

The American Bar Association was upset. Its most successful listserve, Solosez (www.solosez.net), was some 3,700 strong, but its 7 million emails supposedly ate up nearly 40 percent of its server capacity, accounting for more than half of the ABA's email traffic. Bar politicians, ruing the day the list was created some 13 years back, tried to defund the list, insisting that a mailing list was old technology.



U.S. Virgin Islands lawyer Andy Simpson (www.coralbrief.com/) had a trick up his sleeve, naming himself head of a strategic planning committee to explore ways to improve the list and contain costs. Here's his report:

The first thing we did was look at the infrastructure the ABA is using for listserve traffic. To our horror, we discovered that all of the ABA's listservs are run from a offbrand server running Windows NT Server. Thus, one of our suggestions is to upgrade to two state-of-the-art Dell or HP servers running Windows 2008 Server. One would be dedicated to Solosez and the other would be dedicated to the remaining ABA lists. Of course, cost is always a factor with the ABA, and we may need to pass the hat to accomplish this goal.

The second suggestion is a bit more controversial, but also far more exciting. We have been in extended discussions with Google about having it take over Solosez and spin it off from the ABA. An essential condition of this idea, which Google has agreed to, is that Solosez must always remain free. There are many advantages to this: (1) Google will pay the ABA a small fee for every message that is posted to the list; (2) the five message per day limit will be removed; (3) using Google's extraordinary filtering algorithms, political content will automatically be filtered and sent to a separate list that you will be free to subscribe to; (4) again, with the filtering algorithms, water cooler topics and other topics will automatically be flagged by Google, so that we won't be required to use labels like [WC], [TECH], [BK], [FAM] etc.; and (5) the algorithms will detect jurisdiction-specific questions and send them only to subscribers in that jurisdiction. One of the most exciting things is that Google would generate a knowledge base from prior Solosez posts. Hence, a member's post asking about backup strategies would come with a post directly from Google directing readers to links to past messages where backups were discussed. Think of it as the archives on steroids. We are only just beginning to explore all of the ways that Google can enhance Solosez.

The controversial side of the Google concept is that Google would add advertisements to Solosez messages based upon the content of the message. Thus, if someone posted a question about backups, there might be an ad for an on-line backup service along the right side of the post, much the way ads appear when you do a Google search.

We know that the Google idea in particular will be controversial, and there may be negatives that we haven't thought about. Accordingly, we've created a short survey on SurveyMonkey.com and invite you to chime in with your thoughts.

Even though the final survey question asked respondents if they'd ever been the victim of an April Fool's Day joke, an amazing number of lawyers believed Simpson's proposal to be the real thing, offering to send in donations and questioning the downside of the Google option. All joking aside, can we expect to see Google hosting mailing lists in this manner before long?

jennifer j. rose receives her email at jjrose@jjrose.com in Morelia, Michoacán, Mexico.

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SitesForSoreEyes

The Travel Site Less Visited

By Jim Calloway and Courtney Kennaday

The idea of traveling, whether for business or pleasure, is both exciting and vexing. Unfortunately, few of us have the time or money to permit us to hit the road not caring where we stay or how we get there. That's why we believe there isn't an aspect of travel that can't be improved by careful Internet research, from the planning stages on.

We all know the heavily advertised travel websites like [Orbitz](#), [Expedia](#), and [Travelocity](#) (we can even hum their jingles). Of course, we love those sites and use them, too. But the great poet Robert Frost wrote of the "road less traveled." We



prefer to explore the site less visited. We hope you enjoy these unusual websites, and that you find them useful and fun too.

For starters, we love [Trip Advisor](#), which offers all the tools you need to plan your trip. But what makes this site golden are the reviews from actual travelers. We wouldn't think of planning our next vacation without it. While people's opinions can and do differ on a given hotel or restaurant, we prefer to know as much as possible before we book. If we're looking for a quiet hotel for a romantic weekend with our spouse, reading several reviews that mention "child friendly" or "big water slide" could save us from disaster. You can sort hotel searches by popularity, price, class, alphabetically, or top value. Be sure to check the date of the review before making a final decision. Hotels that were reviewed negatively can get a new manager or remodel and make a turnaround, and vice-versa. Besides Trip Advisor, you might also sample the reviews over at [Yelp](#), which was founded to help people find reviews of local businesses.

We also love [Kayak](#), which lets us search many airlines at once. A particularly useful feature is the ability to "favorite" promising flights as you scroll through the pages of potential flights. You can look through several pages of search results marking favorites. When one tires of that (which for us is when the prices start getting way too high), you can go to your favorites and pick the winner.

We all know that all airline seats are not created equal. Some of us like window seats and some of us like the aisle. (We're not sure anyone likes the middle.) But [SeatGuru](#) gives us the lowdown on what seats have "hidden" positive and negative features, like a cool breeze from the air conditioning system or a block against reclining due to the exit row behind. We always have this site standing at the ready when we reserve our tickets online and bring it up when it is "select a seat" time.

[Bing Travel](#) (formerly Farecast, but acquired by Microsoft in 2008) is the first airfare prediction website. According to Bing Travel, it utilizes over a billion airfares on a daily basis to predict with 75 percent accuracy whether fares are rising or dropping and if you should buy now or wait. We searched for flights to San Diego from our home town. The search results produced a typical list of flights, sorted with low price first, but the kicker was the 7-day Price Predictor for the search, which indicated that we should buy now, since predicted fares were rising or steady. There was also a confidence rating of 94% that the prediction was accurate based on their track record. There's also a hotel Rate Indicator, which labels hotel finds by "Deal," "Average" and "Not a Deal." We think it's human nature to want to buy something that has a green "deal" flag on it. At least, it made us feel better about what one has to pay for a hotel in Washington, D.C.

Another option for finding the best deal: sign up for price drop alerts on hotels and flights at [Yapta](#). Or, visit [Travel Zoo](#), which publishes deals on hotels, airfare, rental cars, and more. Travel Zoo aims to be your one destination for deals, and

vows to make shopping for bargains even easier if you sign up for their email deal alert, the Travelzoo Top 20®

Bring all your travel research together with [Trip It](#), which promises to turn the chaos of planning travel on the Internet into an orderly process. Sign up for free and you can build an itinerary, organize your trip, and then Trip It will help monitor it and inform you of any changes.

Here's a site that we hope we never use: [Sleeping in Airports](#). Sadly, it seems an inevitable fact of air travel these days that we may end up draping ourselves pretzel-like around one of those ubiquitous gray airport chairs with a coat over our head trying miserably to catch a few Zs. This site shares travelers' advice and reviews of airports around the world, in terms of comfort for spending more than a short layover. Regretably, we note that only two of the top ten "best" airports are even on our continent.

You know the saying: "when you've got to go..." What if you don't know where to go? You need the [Bathroom Diaries](#). Yes, the Bathroom Diaries lists and rates the facilities in more than 100 countries, including some really remote ones. So if you're in Antarctica and pondering that second beer, go ahead.

Raise your hand if this ever happens to you: you take a wonderful trip and buy picture postcards to mail to your awestruck friends and family. Perhaps you even buy postcard rate stamps. But, somehow, you end up at home with a suitcase full of dirty clothes and unmailed postcards. Enter [Hazel Mail](#). Just upload your digital photos to Hazel, add the personal message and recipient's address, and Hazel will turn your photos into postcards and mail them for you. Each card costs approximately \$1.50 apiece, although you can register and purchase "HazelBucks" to save money. Now there's even an iPhone app for Hazel, which should make it even easier to use while traveling.

What about the nitty gritty of getting from point A to point B in a city? [Hop Stop](#) is a city transit guide for a number of major U.S. cities. If you are planning a trip to NYC, for example, and want to use public transit, go to Hop Stop, plug in your starting address and destination. Hop Stop will give you detailed step by step directions for which subway line to take, where to enter and exit, distances and travel time. Similar to Hop Stop is [Metro](#), but Metro bills itself as the ultimate free guide on PDA (Palm, PocketPC, iPhone, BlackBerry, Smartphone...) to public transport systems worldwide (400 cities covered now).

Want to plan a group vacation with your family or friends? [Triporama](#) gives you the tools to create a group home page, send invitations, share information with everyone, map your itinerary, and more. Membership is free, and the signup is simple. One of us has a big birthday coming up, and the travel deals for girlfriends caught our eye. But Courtney told Jim to get his own friends.

Have you ever heard of the [BootsnAll Travel Network](#)? Sometimes "independent traveler" is a euphemism for "backpacker." BootsnAll started with backpackers in

mind, and grew into something for every kind of traveler. One can spend quite a bit of time there, sorting through mountains of good information. There are the usual travel website offerings, such as flight booking, hotel reservations, and travel insurance, but this is a much more collaborative website, with message boards, blogs, photo sharing, and articles authored by members of the BootsNAll network. Even if you aren't going anywhere right now, the articles are fun reads. The message board is organized by topic, such as "destination forums," "travel resources," "ways to go," and more. Destination forums are broken down by geographic regions. Travel Resources covers a real hodgepodge of food, health, photography, gear, finding buddies on the road, and even funding your travel habit. In order to participate, you must register, but searching and viewing are open to anyone. "Insiders" is a cool feature of BootsNAll. Members can post specific questions about a place and receive an answer from the people who are recognized as experts by BootsNAll. Although this is similar to a message board, you can ask a much more specific question about a place and get an expert answer.

[Real Travel](#) and [Travellers Connected](#) are cut from similar cloth as BootsNAll but may not be as content rich. However, Real Travel makes our list because of the incredible list of hotels and the vacation idea feature. Click on the hotel index, and you are taken to an alphabetical list of hotel names. Click on the hotel you want and get an information page for the hotel. As for the vacation idea feature, just click on a category, like "architecture" or "food & wine," and you get a list of top cities for that category.

Travellers Connected seems to have more of an emphasis on student travel, but we think overworked lawyers could use a "gap year" themselves. One suggestion for what to do with your gap year: relive some of the great journeys of history and literature. [Wanderlust](#) maps out the travel routes of Lewis and Clark, Charles Lindbergh, and Phileas Fogg (*Around the World in 80 Days*), among others.

With all these great websites at your disposal, we have just one question: are you packing yet?

Jim Calloway is the director of the Oklahoma Bar Association Management Assistance Program. He served as chair of the ABA TECHSHOW 2005. Calloway publishes the weblog, Jim Calloway's Law Practice Tips, at <http://jimcalloway.typepad.com>, and was coauthor of the book, *Winning Alternatives to the Billable Hour*. He serves on the **GPSolo Division Technology Board**. Courtney Kennaday is the director of the Practice Management Assistance Program of the South Carolina Bar, where she advises bar members on practice management and law office technology. She also publishes the weblog, SC Small Firm.com, at <http://www.scsmallfirm.com>.

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TechNotes

Primping Your PDFs

By Brett Burney

If you practice law today, you must be proficient with PDFs.

The [Portable Document Format](#) has decisively emerged as the standard for electronic court filing, scanning, and the digital distribution of documents. And while most people know how to create and open a PDF, the majority of legal professionals never go beyond those two tasks.

That's a shame, because the PDF file format offers so much more for those who are willing to click into rarely visited menus. In this column, I explore a few of the easiest and most useful features that anyone can use when working with PDF files.



Creating and Viewing PDFs

Most people associate PDF with the [Adobe Acrobat](#) application, but that's not always a necessary marriage. Adobe did indeed create the PDF file format in 1993, but they wisely and freely licensed the format so that many other applications could create and view PDF files.

To create a PDF, you can pay the premium price for a "[full version](#)" of Acrobat, as opposed to the [free Adobe Reader](#), which is only a viewer.

One of my favorite third-party PDF creators has always been [pdfFactory](#) from [FinePrint Software](#). Another option is the free [CutePDF Writer](#), which many people recommend. And lastly, there are many free online services (such as Adobe's own [Acrobat.com](#)) that will let you upload a document and download the converted PDF. The free online services are handy when you need a PDF and you're sitting at a computer that's not your own.

The beauty of the portable document format is that anyone can view it. The [Adobe Reader](#) is free for anyone to download, but you can find more streamlined alternatives such as the free [Foxit Reader](#).

Many of the tips that I address in this column are based on the functionality found in [Adobe Acrobat 9 Pro](#), the latest version of Acrobat on the market (please also refer to [my review](#) of Acrobat 9 and my [earlier review](#) of Acrobat 8). Many of these tips can be accomplished in other versions of Acrobat as well as third-party applications, but you'll just need to consult with the accompanying help file to see how the feature and function is different.

Archiving Websites

Most legal professionals limit their PDF creation skills to Microsoft Word or WordPerfect documents (both applications now also have built-in methods for saving files as PDFs). But a PDF can be created from any application that uses the "Print" dialog.

For example, I constantly convert websites and web pages to PDF that I want to archive and save. In many cases, the web page looks perfect and all of the links are preserved (i.e., they are "clickable" within the PDF).

Converting a web page to a PDF is a wonderful way to get a "snapshot" of the site before changes are made, or a great way to preserve a story for later reading.

Combining Multiple PDFs

The Document menu within Acrobat 9 offers a wealth of helpful options. This menu allows you to insert, replace, extract, delete, crop, and rotate pages in your PDF files.

The Insert Pages menu item is indispensable when I need to digitally glue several files together to send via email. It just seems much more efficient to send a single PDF rather than multiple files.

Bookmarking Your PDF

When I stitch multiple PDF files together, I add bookmarks on the left side to denote the beginning of each file. Not only that, but the bookmarks also serve as a clickable table of contents for my collection of files. This is an essential navigation addition in my opinion, and makes the PDF experience so much more interactive.

Bookmarks can be plain, bolded, or colored to draw attention to appropriate sections. You can also drag and drop to reorder bookmarks, as well as indent for subbookmarks.

Bookmarks can do a lot more than just take you to another page. They can open files or click to a website. Bookmarks also save the magnification or “zoom level” of a page when they are created, so they can be a nice way to call attention to a specific paragraph or table within the PDF.

All of this bookmarking goodness would be wasted if the recipient of my PDF file couldn't see the Bookmarks panel. So to make sure the panel appears when they open the PDF, I go into the Document Properties (under the File menu), click the Initial View tab, and select the dropdown option that forces the Bookmarks panel to appear when the PDF is opened. (The Bookmarks panel can be easily hidden when necessary.)

Thumbnails Instead

If you're not a fan of textual bookmarks, you can elect to view tiny thumbnails of each page of your PDF. That may not sound very appealing, until you realize that you can drag and drop pages to reorder them.

Links in the PDF

Links aren't just for the Web—you can create links inside your PDF that go to a different place in the PDF, open a file, or jump to a site on the Internet. (Recall that when you PDF a website, the hyperlinks on the site remain clickable in the PDF.)

The Link Tool is found under the Tools > Advanced Editing menu in Acrobat 9. When the tool is activated, you simply draw a box around anything—text, picture,

etc.—and select options from the dialog box that pops up.

The link can be indicated by a colored underline or a “visible rectangle,” depending on how much attention you want to draw to the link. You then determine whether the link jumps to another page, opens a file, or launches a website. It’s that simple.

If you have a long PDF file, such as a brief or research paper, the Link Tool allows you to link to supporting case law or online resources. If you make a reference to an appendix at the end of the PDF, for example, you can have a link that allows the reader to jump right to that section. It’s such an easy tool to use, and it’s a shame that more people don’t put it to good use.

Headers and Footers

Microsoft Word and Corel WordPerfect are “word processors” where you compose and edit documents. A PDF is a finished, “published” document that is not intended to be modified once it has been converted to PDF. That’s why you’re not allowed to change text easily in Adobe Acrobat.

With that said, however, it is possible to make some small changes to PDF files within Acrobat. For instance, you can easily add headers and/or footers to a PDF in Acrobat. You simply click on the Document > Header & Footer menu item and you can add a limited number of items to the top or bottom of your PDF file. (Note that this is the same tool used to apply Bates Numbers to PDF files.)

I use the header and footer tool to add page numbers to my PDF when I’ve combined several files together. You definitely have more options for adding headers and footers in Word and WordPerfect, but Acrobat’s tool is simple and easy to use when necessary.

Typewriter Tool

Again, PDFs are not meant to be edited once they’re in Acrobat, but since version 7.05 of the software, Adobe has provided an invaluable feature called the Typewriter Tool that lets you type text anywhere on a PDF file.

While you’ve always been able to create a Text Box on PDF files, it was a little bulky to use. In comparison, the Typewriter Tool lets you click anywhere to get a blinking cursor, and you just start typing.

I use the Typewriter Tool all the time when I need to fill out PDF forms sent to me. Rick Borstein from Acrobat has a [great blog post](#) describing the Typewriter Tool in a bit more detail.

Resources for Learning More

Speaking of Rick Borstein, his [Acrobat for Legal Professionals](#) blog should be mandatory reading for any legal professional that has to deal with PDF files (and that's everyone!). Rick is a business development manager at Adobe that is solely focused on the legal market. That means his blog is dedicated to providing expert tips and information about using PDFs effectively in the practice of law.

Another fantastic resource for learning about PDFs is the [PDF for Lawyers](#) blog authored by Ernest Svenson. Ernie does a fantastic job of providing practical tips for getting the most out of the PDF file format in a law practice.

As you can see, the portable document format has a tremendous amount of functionality built into it, and willing users can easily create functional, practical documents rather than just static files. No one has time to sit and train on the more advanced options, but with just a few additional clicks, everyone can easily add a little more pizzazz to their PDF proficiency.

Brett Burney is Principal of Burney Consultants LLC (www.burneyconsultants.com) where he focuses his time on bridging the gap between the legal and technical frontiers of electronic discovery. You can e-mail Brett at burney@burneyconsultants.com and visit his blog at www.ediscoveryinfo.com.

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Xerox Phaser 8860MFPMFP

Reviewed by Jeffrey Allen



Picture courtesy of xerox.com

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For a long time, I recommended against law offices using, as a primary device, multifunction printers that combined a copier, printer, and fax machine. I had no problem with using them as secondary devices, but I felt uncomfortable with the idea that if one machine broke, the office pretty much went out of business until they could get it fixed, unless they already had backup devices.

Some time ago I discovered the Xerox Phaser printers. I have used them in my office as my primary printers for about eight years. For the last eight or nine months, I have used the Xerox Phaser 8860MFP, and it has changed my mind about the use of MFP devices as primary equipment.

The 8860MFP has proven solid, dependable, and reliable. It also does an excellent job printing and copying in color.

The Phaser technology involves melting and applying ink that you get in solid blocks. You load four different colored ink blocks into the device, and you are good to go. Each ink color block has a different shape than the other three to prevent you from putting the wrong color ink in a slot.

Significantly, Xerox claims a relatively low per copy cost for its printing technology. Recognizing that the ink coverage on the printed page determines the actual cost of printing a page, Xerox did some comparative studies. They determined that with three percent coverage, printing costs with the 8860MFP came to \$.01 per page in both black and white and color. A competitive color laser printer cost \$.03 per page for color and \$.01 per page for black and white. The more the ink coverage, the greater the savings, as with 25 percent coverage, they reported a per copy cost of \$.07 per page in both color and black and white for the 8860MFP. The competitive color laser printer per copy cost for the same pages came in at \$.08 for black and white and \$.22 for color.

Because the 8860MFP uses an energy-saving mode, it takes a while to warm up before you print, but once it has warmed up, it produces copy fairly quickly. Speaking of environmental concerns, the 8860MFP generates significantly less waste than a comparable color laser printer.

Xerox reports that the 8860MFP prints up to 30 pages per minute in both black and white and in color. The “up to” part of that statement is important as the more ink coverage you have on a page, the longer it takes the 8860MFP to print it. A color 8" x 10" picture will take substantially longer to print out than a letter.

The 8860MFP prints, scans, faxes, and copies and carries a duty cycle rating of up to 120,000 images per month. Most solo practitioners and many relatively small firms will find that they never approximate that quantity of images. Larger small firms, medium-sized firms, work groups, and the like have a greater likelihood of approaching that level.

The 8860MFP comes with networking built in, and it will accommodate both USB 2.0 and 10/100BaseTX Ethernet. Connecting the printer to a network proved very easy. It amounted to plugging the Ethernet connector into the 8860MFP, putting the installation disk in the computer, and telling it to install the required drivers and operating software. The 8860MFP supports both the Mac and Windows operating systems.

The 8860MFP comes with one paper tray, but you can add up to four additional paper trays to give you the ability to move from one type of paper to another. One tray gets you 100 sheets of paper. The additional trays get you up to 525 sheets each.

The fax/scanner/copy functions use an automatic document feeder that will take up to 50 sheets (although in my experience the frequency of jams increases as you close in on the maximum number of pages).

The 8860MFP provides excellent print quality with sharp detail in both black and white and color. It does a very good job with color pictures, even on standard copy paper. If you want the picture to look particularly good, get some photographic printing paper and use that.

I have no hesitation in recommending the 8860MFP as primary office equipment for use in a small firm, medium firm, or small to medium work group with relatively high production requirements. The more you use the printing function, the more you will save on prints to offset the acquisition price, which starts at \$3,995. My only reluctance in recommending the 8860MFP to a solo practitioner is the acquisition price, as unless the solo has exceptionally high production demands, it may be hard to justify the acquisition cost.

Jeffrey Allen is the principal in the law firm of Graves & Allen with a general practice that, since 1973, has emphasized negotiation, structuring, and documentation of real estate acquisitions, loans and other business transactions, receiverships, related litigation, and bankruptcy. Graves & Allen is a small firm in Oakland, California. Mr. Allen also works extensively as an arbitrator and a mediator. He serves as the editor of the *Technology eReport* and the Technology & Practice Guide issues of *GPSOLO Magazine*. He regularly presents at substantive law and technology-oriented programs for lawyers and writes for several legal trade magazines. In addition to being licensed as an attorney in California, Jeffrey has been admitted as a Solicitor of the Supreme Court of England and Wales. He holds faculty positions at California State University of the East Bay and the University of Phoenix. You can contact Jeffrey via email at jallenlawtek@aol.com. Mr. Allen blogs on technology and the law at www.

jallenlawtekblog.com.

Quickbooks for the Mac 2009

Reviewed by Jeffrey Allen

For some time QuickBooks has enjoyed a reputation for providing a solid, if somewhat basic, accounting software for small-business use. Although Intuit has largely favored the Windows side of the street, it has shown a friendly attitude to the Mac side of the street. This year Intuit gave us the Leopard-compatible 2009 iteration of QuickBooks for the Mac.

While Intuit has two versions of QuickBooks on the Windows side of the street (QuickBooks Pro and QuickBooks Premier), they offer only one version on the Mac side. The offered version (QuickBooks for the Mac) is more or less the equivalent of QuickBooks Pro for Windows. In analyzing the feature comparison chart offered by Intuit on its website, the only significant feature available in the Pro version that does not come on the Mac version is the ability to track international sales in multiple currencies. Conversely, the Mac Version offers some Mac-only features that do not have Windows equivalents; those features include the ability to back up to MobileMe, synchronization of contacts with the Mac OS X Address Book, and adding reminders to iCal.

One of the primary reasons for a Mac attorney to consider QuickBooks for the Mac is the ability to read company information created on a Windows-based system. To test this function out, I took a database created by one of my clients in QuickBooks for Windows. QuickBooks for Mac immediately recognized the database and told me that it was built with an earlier version of QuickBooks that required me to upgrade it to the version I was using. I told it to upgrade the database, and it did so in short order. As soon as it finished upgrading the database, it opened up for me and displayed all of my client's accounting data without a problem.

As my practice includes litigation of disputes where accounting issues may have relevance or even be the basis of the dispute, the ability to read accounting data files, whether created on a Mac or a Windows version of QuickBooks, is a major sales point for me. The program costs only \$199, and I would buy it just for that feature and think I got fair value, as I do not want to have to use a Windows machine every time I have to look at an accounting file. Although not all accounting files come in on QuickBooks, for whatever it may be worth, most of the files I have received from clients or through discovery have, in fact, been QuickBooks files.

I see no reason that you could not run the basic accounts for a law firm on QuickBooks, using it to print checks and track your expenses and receipts. It has

no built in payroll; however, it gives you the choice of two add-ons that Intuit believes will work satisfactorily with QuickBooks and handle your payroll tasks. I did not have access to current versions of either of those options and did not include those features in my analysis for this review.

Although the program does have the ability to generate invoices and some ability to track time, it does not provide the type of time and billing interaction that most law firms need; so if you use QuickBooks for your law firm's basic accounting needs, you should plan to do your billing through another program.

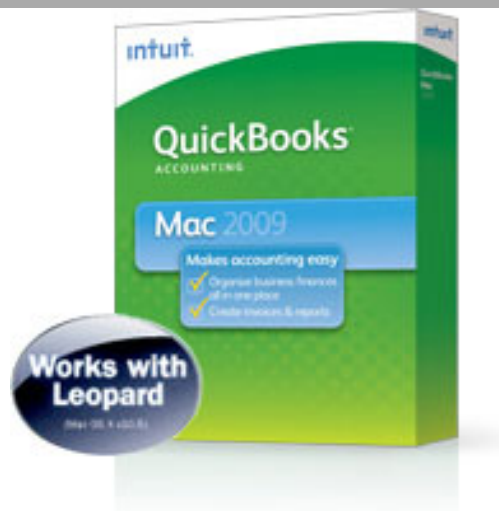
Though a fully integrated program would be desirable, not having one does not cause the world to come to an end. It does involve some duplication of effort, as receipts would be entered separately in each program; but that does not create a major problem for most solo or small firm practitioners. It is a greater problem for larger firms. The more clients you have sending you checks, the more work it is, as each requires entry both in the accounting system and the billing system. Despite that apparent inefficiency, I have chosen to do that in my firm to create a doublecheck for recording errors.

If you need your accounting program to handle the processing of credit-card transactions, Quicken does not do that. I am not sure how much of a problem that will prove to be; I do not currently use credit cards in my practice. I did it some time in the past and terminated the practice when it became more trouble than it was worth. On the other hand, the economy has created a situation where more of my clients and prospective clients ask about using a credit card, and I am considering setting up that facility again. I expect to see more attorneys taking credit cards in this economy, so that may be a feature you need to think about before using QuickBooks to run your practice.

QuickBooks Mac 2009 requires a Mac running a G4 (876 MHz) or later and faster processor (G5 and Intel processors welcome), Mac OS X v. 10.5.4 or later, a minimum of 512 MB Ram, 150 MB of available hard-disk space, and an optical drive if you do not buy the download version and have them send you a CD. You will also need a printer if you plan to print checks, invoices, reports, and so forth.

QuickBooks comes with a number of built-in report forms. It also affords you the opportunity to massage the report forms and create customized forms to suit your personal needs.

For those of you that have the previous version, QuickBooks for the Mac 2007, you will find the new version offers a very much-improved interface. The update incorporates an interface that facilitates your interaction with the program. The new version also does add features to bring it to substantial equivalence with the Pro version on the Windows side.



QuickBooks Mac 2009 Comp

The bottom line is that if you are a Mac lawyer who deals with accounting issues either in litigation or in an advisory manner, you will want to consider QuickBooks for the Mac 2009 as many small businesses use it as their primary accounting system, and it will give you the ability to read their data. I think you will want this software, even if you do not plan to use it to run your own firm's accounting.

Jeffrey Allen is the principal in the law firm of Graves & Allen with a general practice that, since 1973, has emphasized negotiation, structuring, and documentation of real estate acquisitions, loans and other business transactions, receiverships, related litigation, and bankruptcy. Graves & Allen is a small firm in Oakland, California. Mr. Allen also works extensively as an arbitrator and a mediator. He serves as the editor of the [Technology eReport](#) and the Technology & Practice Guide issues of *GPSOLO Magazine*. He regularly presents at substantive law and technology-oriented programs for lawyers and writes for several legal trade magazines. In addition to being licensed as an attorney in California, Jeffrey has been admitted as a Solicitor of the Supreme Court of England and Wales. He holds faculty positions at California State University of the East Bay and the University of Phoenix. You can contact Jeffrey via email at jallenlawtek@aol.com. Mr. Allen blogs on technology and the law at www.jallenlawtekblog.com.

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Call for Nominations of Officers and Council Members Election—2010/11 »

The following members have been appointed to serve as the Nominating Committee for the FY2010 bar year: Alan Olson

Upcoming Events

- **2009 GPSolo Fall Meeting and National Solo & Small Firm Conference** »
October 15–17, 2009
Los Angeles, California

Upcoming CLE

- Teleconference
Actions that Affect Applications for U.S. Citizenship »
March 25, 2009 • 12:00 p.m. CST

(chair) and members N. Kay Bridger-Riley, Jennifer Rymell, Stephen Rosales, and David Lefton.

The Nominating Committee will meet during the 2009 Fall Meeting in Los Angeles, October 15–17, at the Millennium Biltmore Hotel to nominate individuals for the positions of Division vice chair, secretary, and members-at-large of the Council. In accordance with section 4.4 of the bylaws, the committee will nominate five council members-at-large to serve four-year terms. Minority applicants are encouraged. The duties, terms of office, and eligibility requirements for each of the positions to be filled are outlined in the Division bylaws.

Please return your completed [questionnaire](#) to the Division Office via email at genpractice@abanet.org or via fax at 312-988-5711 or mail directly to ABA, General Practice, Solo and Small Firm Division, 321 N. Clark Street, Chicago, IL 60654. It must be postmarked by Thursday, **October 1, 2009**.

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[2009 Fall Meeting and National Solo & Small Firm Conference »](#)

Join the ABA General Practice, Solo and Small Firm Division at their 2009 Fall Meeting and National Solo and Small Firm Conference, October 15–17, 2009 in Los Angeles, California. The Conference will have a technology track that will discuss practical tools, freebies, software, hardware, and much more that every solo and small firm attorney needs to succeed in the tough economy. Speakers include Ross Kodner, Jeffrey Allen, Lisa Solomon, Michael Swarz, and Jacques Nack Ngue. For more information or to register, visit www.abanet.org/genpractice.

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