



## A CONVERSATION WITH BRUCE BIAL OF RIEMER & BRAUNSTEIN

*The Edge* recently had a chance to talk with Bruce Bial, Firm Administrator of Riemer & Braunstein, LLP in Boston. The firm recently converted from WordPerfect to Word, upgrading or converting a number of other applications in the process as well, including a new template package, metadata tool, and redlining software. We asked what made the firm finally decide that this was the time to make these changes.

“Well, other products were just not supporting WordPerfect any longer. As a firm, we like to be – if not on the cutting edge – just behind it, and WP just didn’t allow us to do that,” Bial said.

We talked about the firm’s choice of a template package – one thing just about every law firm spends a good deal of time planning before a Word rollout. Bial explained that a lot of time was spent reviewing the major template and metadata tools, to be sure they would be right for Riemer. The firm eventually went with Esquire Innovations’ iCreate template package.

“Esquire was tremendous. It was a very nimble product, able to adapt to our needs. What impressed me was the fact that if we had a good idea, they were willing to listen and incorporate it into their product to benefit other customers,” Bial said. “We appreciated their follow up through all phases of the rollout, from the President to the Project Manager – even to this day, post-project, they are still very responsive.”

In addition to iCreate, Riemer is now using iScrub, Esquire’s metadata removal tool. This has virtually replaced the use of Adobe Acrobat at the firm. “iScrub is a fabulous tool. Our attorneys were primarily using PDF as a transportation vehicle. There is now very little need for Adobe – it’s almost phased out.” Of course, Riemer will continue to keep Adobe for times when clients specifically request PDF documents, as well as for court submissions requiring PDF format.

***“We saw no productivity decrease, no impact to services – in fact, we saw productivity increase overall.”***

See [Riemer](#), p. 2

## AM I PDF READY?

***EXAMINE THE PDF-READINESS  
OF YOUR WORD SOURCE***

**BY SHERRI KAPPEL OF MICROSYSTEMS**

Everyone’s making PDF files these days — in fact, the process has become our newest verb: “PDF-ing”! But with a plethora of PDF file-makers out there, coupled with the variances of our native Word source, our resulting PDFs may be as inanimate as printing them to paper. Perhaps you’d like to examine how your Word source can be made more “PDF-ready”? As it turns out, there’s a lot more to a PDF file than its extension!

See [PDF](#), p.3

## ACT! TRAINING NOW

**AVAILABLE**

If you’re not already familiar with ACT!, it’s a contact management solution which integrates with Outlook. ACT! provides users with an easy interface for managing all customer/client information in one place. You can learn more about the product at their website, [www.act.com](http://www.act.com).

If you do use ACT!, you’ll be interested to know that ODC is now available to provide customized ACT! training for your users. Call Susan Evans at 617-965-6013 to schedule.



## RIEMER, CONTINUED FROM P. 1

Planning a conversion and rollout of this size, it's natural to be nervous about how it will be received. One of the things worrying Bial was how well the attorneys would adjust to the new system and business processes. "I didn't know if they would use the templates, get on board with the new applications. After all, we have been a WordPerfect shop for so long, this was really a complete retooling of our systems. The firm is dependent on our attorneys being technologically proficient," Bial explained. Combined with the fact that Riemer's attorneys are very mobile, this meant that everything had to work, and work well, right out of the gate. The firm is very happy with the tools they are now using. "These products are working well for us," Bial said.

Referring to the training and support, Bial noted that extra planning time on the front-end was one of the things that made a big difference. Bial, along with Julie Picher, the Assistant Firm Administrator, worked with ODC consultants to fine tune a training and support schedule to fit the culture and learning needs of the firm. "The training plan was very fluid, and the shorter, more precise sessions were great. Also, communication between everyone was excellent. The attorneys expressed to me that this was the best technology rollout project we've ever done. They were very pleased."

Everyone hopes for that kind of success with a project; when asked if there was anything that surprised him, Bial said, "We saw no productivity decrease, no impact to services – in fact, we saw productivity increase overall."

So, what's next for Riemer? "Well, we're opening a new office in New York; that's one of the reasons this new technology was so important to us. We needed to be able to serve our clients in a mobile, responsive way." The New York office, which Bial expects to be open within the next couple of months, will initially be about the size of the firm's Burlington office.

In terms of technology, Bial also plans to beef up their disaster recovery solutions this year. With the addition of another office, it's even more important for the firm to have a critical plan in place for offsite data storage and replication. Both of these initiatives will certainly keep Bial and the firm busy through the summer months.

## ZOOMERANG!

ODC recently began using Zoomerang, a web-based survey tool that allows us to provide easy, customizable surveys for any client. As John Wood of ODC explains, "We began researching this new technology based on client need."

Recently, a corporate customer contacted ODC about providing some targeted-topic classes, but they weren't sure what classes to offer. The customer wanted an easy way to determine which topics would be most useful to their end-users.

While a traditional approach may be to send out an internal e-mail to end-users requesting a response, as many IT professionals know this can be problematic. Often, people don't respond, not wanting to take the time to think about or compose a reply.

Bob Varney, a senior account manager with ODC, learned of a product called Zoomerang, and discovered that it provided ODC – and their clients – with a great solution. ODC can produce a customized survey for the client, listing targeted topic class information. The survey takes just a couple of minutes, is easy to complete with a few mouse clicks, and will more accurately reflect the needs of the user community.

"This service will be available to any of our customers who wish to use it," Wood said. Karen Acciardo is ODC's Zoomerang survey expert, and has already developed several surveys. Call to find out how ODC can put Zoomerang to work for you.

## PDF, CONTINUED FROM P.1

### What's in a 'good' PDF file?

As you move your Word source into PDF, the destination should be your specification." Who is your recipient? What are their needs? Based on those requirements, you'll know when to care enough to send your very best:

| Destination                       | Specification          |
|-----------------------------------|------------------------|
| Recipient needs only to print     | Image-based            |
| Recipient needs to search on-line | Text-based, Flat       |
| Recipient needs to review on-line | Text-based, Structured |
| Recipient needs to repurpose      | Text-based, Tagged     |

### Timeout — I need a short glossary lesson, please?

A short glossary lesson is offered below — but please recognize it's only a beginning: as we've said, there's so much more to a PDF file than a three-letter extension!

**Image-based** An image-based PDF is a lot like a TIF file — it provides a 'picture' or graphic rendition of a printed page.

**Text-based** A text-based PDF file delivers a searchable text layer, and, unless secured, provides copy-able or repurposeable content.

**Structured** A structured PDF file delivers navigation when reading on-line. This means the reader or reviewer can move throughout the document using bookmarks which permit 'jumping' to specific sections of the document or discrete locations on pages. (In Word, our synonym would be the "Document Map", where applied outline levels deliver navigation throughout the document.)

**Tagged** A tagged PDF delivers 'named' elements. For example, page formatting is held separately, thus can be 'reconsidered' as differing display devices represent the pages; tables are seen as text within table structures, not just as text placed uniformly on a page; headings are identified as

such. Tagged files provide far more intelligence when repurposing content, such as when moving PDF content back into Word: paragraphs wrap, table structures are maintained, language and special character elements are preserved, etc.

### How does my Word source play a role in producing a quality PDF?

We've always known styles and structure were important, that proper font and special character usage was critical, that keeping field codes updated and links 'active' made a difference *inside* of Word. The good news is: it's just as important when making a PDF, too!

The checklist below should help you assess your Word work product for its "PDF-Readiness":

- ✓ Ensure pagination path is uncompromised (Tools | Options | Compatibility | (uncheck all which impact pagination)
- ✓ Ensure no missing or incorrect fonts (Tools | Options | Compatibility | Font Substitution)
- ✓ Use 'outline' styles "Heading 1 to 9", or configure Adobe to recognize your named outline styles (Adobe PDF | Change Conversion Settings | Bookmarks | (add designed styles)
- ✓ Verify no errored field codes
- ✓ Optimize the quality of graphics in the document, excise any non-visible portions of the image
- ✓ Remove highlighting or text color changes
- ✓ Remove hidden text (it affects pagination)
- ✓ Activate email addresses and internet addresses as links
- ✓ Make sure email addresses and internet addresses are valid
- ✓ Ensure cross references contain the hyperlink switch (\h)
- ✓ Remove unintentional metadata (Adobe PDF | Change Conversion Settings | (uncheck "Document Information"))
- ✓ Make sure table structures fit within margins

## ASK OLIVIA

Dear Olivia,

*I recently noticed a co-worker quickly open Windows Explorer with a keystroke. Do you know what it is?*

**Signed, Key-urious**

Dear Key-urious

I sure do – that handy keystroke combo is **Alt + E**.

Dear Olivia,

*I know one of the new features in Windows XP is to group all open documents together under one taskbar button. I don't like this feature - I would rather see each document I have open as a separate item on the taskbar. Can I change that setting?*

**Signed TaskHappy**

Dear TaskHappy,

Yes, you can change that setting. Here's how:

1. Right-click anywhere on the task bar
2. Select **Properties**
3. On the **Taskbar** tab, uncheck the box for 'Group similar taskbar buttons'

## HAVE YOU HEARD?

Esquire Innovations, Inc. now offers the **iOffice System** suite, a bundled package of their signature products – iCreate, iScrub, iDocID and iRedline.

Esquire's iOffice System is designed to work hand in hand with the Microsoft Office system, giving you a complete package for document creation, comparison and metadata removal.

You can learn about the Esquire products at [www.esquireinnovations.com](http://www.esquireinnovations.com), or contact Susan Evans at ODC for more details, pricing, or to schedule a demo.



Left to right: Bob Varney, Susan Evans and John Wood

## ODC ENJOYED AN 'OCEAN OF OPPORTUNITY' AT ITTC

The **Information Technology Training Conference (ITTC)** was held June 21-23 this year in Newport, Rhode Island, at the Hyatt Regency Hotel. To quote Kat Baillie, Conference Chair, "ITTC has evolved into the northeast's longest-running, technology training and learning services conference. Unique in its charter...produced by ADAPT and HAT".

We enjoyed seeing new and old friends at the conference, and had a great time. This year, the theme of the conference was *An Ocean of Opportunity*, and in that spirit ODC made things fun for everyone, with a game-style demo of TutorPro called "Fishing for the Truth".

Congratulations to Martha Priest of Partners Healthcare Systems, who won our donated prize of a one-year family membership to the New England Aquarium!

For more information about the conference, check out [www.itconference.org](http://www.itconference.org).

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