

THE PERSONAL COMPUTER IN YOUR PRACTICE  
FIN DE MILLENNIUM

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By Noel C. Ice

### I. INTRODUCTION

I am not a computer guru, nor do I do much lecturing on this subject. I have, however, been using computers in my law practice, day in and day out, since I purchased a Macintosh in 1984. So, I can give the observations that 15 years of hands on experience imparts.

Until about 1996, or so, a discussion about computers in a professional practice usually centered around which word processor to use, which spread sheet software is the best, and why Macintosh users thought that anybody using DOS must be suffering from a previously unclassified form of mental illness. Well now DOS is gone and although the word processor, spread sheet debate is still raging, nowadays most of the discussion is about the internet.

For a more detailed and thoughtful article on the internet, see "Using The Internet In an Estate Planning Practice," by Glenn M. Karisch. This can be viewed or downloaded from Glenn's popular web site: [www.texasprobate.com](http://www.texasprobate.com).

### II. OPERATING SYSTEMS.

Fortunately, DOS is dead. It always performed as if it ought to have been, and now it is. If you actually like DOS, counseling is available.

Unfortunately or fortunately (depending on your perspective), Microsoft is not dead, although it is trying to see to it that all of its competitors will be. Bill Gates is like the farmer whose only ambition in life was to acquire all of the land bordering his own, and all the land contiguous to any he acquired.

The reports of the demise of Macintosh, predicted each year since 1989, have proven premature. There are good reasons why Macintosh won't die, the main one being that it is still a better computer than the WIN-TEL machines, despite its relatively small market share (only a few million or so). I use both. Like everyone else who uses both, I prefer the MAC, but only just barely. As Windows has matured, so have the similarities, and even I confess that the MAC does not have the advantage that it used to. All of the major Microsoft products run on Macintosh very nicely, and Windows and MAC versions can be ported back and forth easily. I do it all the time.

I have been amazed by the number of Linux users out there. Linux is touted as a cheap alternative to Windows, and although I don't see how it could possibly compete, apparently it is. I even heard the other day that there is a version of WordPerfect for Linux.

III. WORD PROCESSORS.

Use either WordPerfect or MS Word. There is really no third choice at the present. I use both. Most lawyers use WordPerfect in this part of the country. In the east, Word is dominant. I have found that Word is much less likely to crash in Windows than WordPerfect. I can crash anything, so I know.

The conventional wisdom is that most eastern law firms use Word, and that most Texas law firms have traditionally used WordPerfect. I do seem to notice a trend in favor of Word, even locally, but if you are using one or the other, I see no good reason to switch. I know of several law firms who have forced or are considering forcing their entire staff to switch from WordPerfect to Word, simply because of a perception that Microsoft will dominate and eventually monopolize the market. I think it is way to early to make that kind of prediction, and even though I personally prefer Word, I would not advise anyone familiar with WordPerfect to switch solely out of fear that WordPerfect is going to lose the word processor race. I have direct experience that WordPerfect 8 has a better HTML conversion program than Word '97, if that is important to you.

IV. SPREAD SHEETS.

I believe it would be worth the while of any tax professional to master a spread sheet program. If you are involved with tax computations, my advice is take the time to learn the LOOKUP functions. You will be surprised to find how easy it is to take a tax return and program a spread sheet to follow the mathematical operations that the return specifies.

I think Excel may have the edge over Quattro Pro, but I am not sure.

V. DATA BASES.

There are many data base programs. I use FileMaker Pro, but there are many others. DBase used to be the one to use, but I don't know if it is even around any more. I use a data base to keep track of my clients and of the data that pertains to them. The information in a data base can easily be exported as a text file, where it may be used to merge information in a word processing program. I have been using this technique for years as the engine to create fairly complicated will and trust documents from a form, in a manner similar to that of HotDocs or ProDoc.

VI. CDs.

An unbelievable amount of data can be stored on a computer CD. I bought the entire Encyclopedia Britannica on one CD for about \$70 the other day.

The traditional law library is quickly becoming a dinosaur, now that the Southwest Reporter, the IRS Cumulative Bulletin, Tex Jur, and everything else you can imagine, are all available on CD.

CD towers can be networked so that everyone in the office can access a remote CD library. A legal opinion (a case) on a CD can be printed with ease, or a relevant paragraph can be copied and pasted into a brief, without retyping. Further, research is a hundred times easier. Also, speed is no longer the problem it once was, with faster CD drivers now standard. Finally, there is no need to file each month, and no danger of misfiling. This is a huge time saver. Need I say more?

Well, I will say more. **CDs are quickly being replaced by the internet.**

#### VII. INTERNET LEGAL SERVICES.

Just as you thought that CDs were the answer to your law library shelf space problem, along comes the internet. Internet services, such as that provided by the Research Institute of America's OnPoint, are updated daily, not monthly, and in this day and age that can be very important. Even Lexis, which still maintains a direct modem link, can now also be accessed on the internet.

But isn't speed a problem? Isn't the internet slower than a CD? Well, it depends. If you have a 56K modem, you will be surprised at how fast the internet is. If you have an ISDN connection, you will think life could be no better; but if you have access to a T-1 line it will be. And if you think that nothing could be faster than a T-1, which will get you wherever you want to go in a blink or two, wait 'til you try cable modem, where no blinking is even necessary.

#### VIII. BROWSERS.

There are only two worth mentioning: Netscape and the other one. I use both, but I prefer Netscape over the other one, but only just barely.

I know that a lot of people are switching to Microsoft products because of fear that Microsoft will come to dominate the market place. It is true that Bill Gates attended the John D. Rockefeller School of Economics where he majored in market monopolies, ultimately matriculating with a B.A. (Bachelor of Avariciousness), and that he recently received a Ph.D. in Objectivism from Ayn Rand College, where he wrote his dissertation on "The Moral Imperative to Crush the Weak." But the fact that John D. Rockefeller is Bill's spiritual and moral avatar may be his demise, when one recalls what happened to Standard Oil. And isn't there some kind of litigation going on right now over in federal court?

## IX. BOOKMARK PROGRAMS AND LINKS.

The key to the successful navigation of the internet is to have a good bookmark program. Whenever you find a site worth returning too, you should save the URL as a bookmark. URL stands for universal resource location (I think); but whatever it stands for, a URL is like a phone number. And if you are having trouble keeping up with your social security number, bar card number, home phone, home fax, children's phones, children's cell phones, beeper numbers, your cell phone, your spouse's cell phone, not to mention your business number, business fax, and the number of the direct line to your office and the direct line to your secretary, ignoring your spouse's business number, business fax, etc., then you know what a pain it will be to keep track of all of the URLs you might want to visit. Worse, unlike a phone number, a URL can be something like [http://www.abc.se/~m9761/bm\\_conv/](http://www.abc.se/~m9761/bm_conv/), to give a typical example. My typing skills are such that if I try to enter anything that long and weird by hand, it will take me at least ten tries to get it right.

So whenever you visit a site you like, bookmark it. Each site will invariably have links to other sites, so you might find yourself quickly accumulating many, many bookmarks. I have several thousand. This means you need a good bookmark strategy for organizing your bookmarks by categories.

True, Internet Explorer (IE) has a Favorites folder that you can use for this purpose, and Netscape has a bookmarks menu, but both are inadequate. You may be better off purchasing a commercial bookmark program.

I have tried a half dozen or so bookmark programs for Windows, and wasted a day doing it. Some just didn't work, others were not up to what I was used to on the Mac. I have two, however, that I am pleased with so far.

For a program that as far as I know is just used to convert bookmarks from Netscape HTML to IE Favorites and vice-versa, and is cheap, try Bookmark Converter: [www.abc.se/~m9761/bm\\_conv/](http://www.abc.se/~m9761/bm_conv/). The program is only \$8 and does a great job.

For a full blown bookmark manager, I think that **Quiklink Gold** is far and away the best I have seen, and, as indicated above, I have tried a half dozen or so. Go to <http://www.quiklinks.com>. They have a freeware version that ought to be pretty good. The Gold version costs \$40, but you can download it on a trial basis. Quiklink performs the same conversion function that Bookmark Converter performs, just as well if not better.

The Macintosh bookmark programs are better than anything I have been able to find for Windows. My favorite is URL Manager Pro.

The best article on bookmark programs is found at <http://tucows.fh-reutlingen.de/bookmark95.html>.

All of the better websites have links to other sites. This is a part of the beauty of surfing the web: you can go to a site which takes you to another site which takes you to another site, etc. Along the way you can bookmark the sites you want to revisit. And you can use the arrow tabs or the history menu on your browser to go back and forth to sites you have already been to, without having bookmarked them.

I have a page on my web site (**www.TrustsAndEstates.net**) devoted entirely to links to other sites. I have my links, of which there are thousands, broken down into three categories: Business, Pleasure, and Law. Under the Law links, I even have a category of links to links. Among the best estate planning links to links include:

**[www.texasprobate.com/main/links.htm](http://www.texasprobate.com/main/links.htm)**

**[www.TrustsAndEstates.net/links.htm](http://www.TrustsAndEstates.net/links.htm)**

**<http://members.iex.net/~jghodges/>**

**<http://www.ca-probate.com/links.htm>**

**<http://howardnations.com/nlli.html>**

**<http://www.taxlinks.com/>**

Most any of these sites will take you to all of the various IRS sites where you will find virtually all of the IRS Publications, Forms and other materials available for free downloading.

#### X. HOSTING YOUR OWN WEB SITE.

Websites used to be called home pages; perhaps they still are. It is easier to set up a web site than you may think. There are dozens of easy to use programs that will take you through the process step by step. On the other hand, if you already have a life or are seeking to get one, there are businesses that for a reasonable fee will set up a site for you.

Check out—

**<http://jman5.com/>**

**<http://web.graphtech.net/index.html>**

A word of warning for attorneys. Texas attorneys are required to notify the Advertising Review Committee of the State Bar of any web site published by the attorney that might be considered advertising or related to the profession of law, and the web site must fit within certain guidelines. Specifically, the attorney hosting a web site is required "file a hard copy, including the URL address of (1) the first screen which is sent to the computer of an accessing person when the home page location (URL) is accessed, and (2) any material changes in format that vary from the first screen of the original home page." An application form and a \$50 filing fee must also be submitted and filed. See also, Texas Disciplinary Rules of Professional Conduct Rule 7.04. The rules can be found at [www.obelisk.com/arc](http://www.obelisk.com/arc).

## XI. SEARCH ENGINES.

You know that there are dozens of search engines on the Web that allow you to find out anything you want about just anything at all. In addition to Yahoo, Excite, Alta Vista, Lycos, WebCrawler, HotBot, etc., there is [www.Dogpile.com](http://www.Dogpile.com), which is a search engine of search engines. After you enter your key words, Dogpile will query dozens of the major search engines all at once when you hit the fetch button. You can then choose from among the results obtained. You may be surprised at the variation in results.

## XII. VOICE RECOGNITION TECHNOLOGY.

Voice recognition technology is here. It is not yet quite seamless or problem free, but it will be within a year or two; you can count on it. When that happens, the market for secretaries is certainly going to be affected.

You really will be able to dictate directly to your computer and have your dictation converted to type. I have seen demonstrations of this and it is amazing. You can be sure that a lot of research will be going into perfecting this technology, because as soon as it is really perfected and easy to use, who under 40 wouldn't want it?

Did you know that if you are in a hurry to find information, you can bypass going directly to a search engine and go directly to your browser address window, and instead of typing in a URL, type in a question mark, followed by your search words? I knew that there was a voice recognition product called "Dragon" something or other. I typed in "? Dragon speech recognition", and my browser took me to Excite (I think that it chooses different search engines at random), where the top 10 of over half a million matches was displayed. From there I found the Dragon Systems, Inc. home page in about 10 seconds.

Check it out: [www.dragonsys.com/](http://www.dragonsys.com/)

I found out that some of the attorneys in our office are using Dragon voice recognition technology now. Our MIS guy asked me if I wanted it installed. I told him to see me in six months. You can tell the pioneers from the settlers, because of the arrows in the backs of the pioneers. I have learned the hard way, and now prefer the settler approach. But I am telling you that voice recognition technology will be a settled and everyday part of the work place within two years if not sooner.

### XIII. LIST SERVERS.

For lawyers and accountants and other professionals, a great way to keep up with what is currently hot in your area is to subscribe to one or more list servers. A list server is centered around a subject of common interest, such as probate matters, pension matters, tax matters, etc. Subscribers to the list receive e-mail posted to the list server by other members. If the subject referenced appears interesting, you can read the message, and reply to it if you want; otherwise you can ignore it.

Popular list servers with estate planning attorneys include the ABA-PTL probate list, and Glenn Karisch's Texas Probate List ([www.texasprobate.com](http://www.texasprobate.com)).

An excellent place to look for lists of interest is <http://home.ease.lsoft.com>. For ABA discussion groups go to [www.abanet.org/discussions/home.html](http://www.abanet.org/discussions/home.html).

### XIV. E-MAIL FILTERS.

Your standard e-mail program that comes with your web browser may be adequate for home use, but if you subscribe to any list servers, you will find that a filter is invaluable. My preferred e-mail program is Eudora (<http://www.qualcomm.com/><sup>1</sup>). It has great filtering capabilities. The way a filter works is that you set up certain criteria, e.g., all e-mail from such and such a sender, and direct that mail to go into a special folder you designate. Your e-mail viewing screens will be divided accordingly.

### XV. BETTER AND FASTER.

As Confucius observed, if you spend all your time getting more efficient, and replacing old equipment with the newest version, you will never get anything done.

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<sup>1</sup>By the way, I believe that you can skip the http:// part of most URLs that have www addresses when entering the address, and just begin with the www part.