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# PAPERLESS 102: WORKING WITH PDFs, CASEMAP AND MINDMANAGER

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## I. Introduction

- A. Generally: *Paperless 102: Working with PDFs, CaseMap and Mindmanager* is a one-hour, audiovisual, self-study CLE course continues the discussion from *Paperless 101* regarding the digital management of documents and information in the practice of law. The video covers these topics:
1. working with Portable Document Format files (PDFs), including viewing PDFs, creating PDF files, bookmarking, commenting, using the Typewriter tool, Bates stamping, redaction, and using digital signatures;
  2. using Lexis/Nexis CaseMap to organize facts and documents, and using various CaseMap features (including displaying fields, filtering records and working with linked files); and,
  3. using mindmapping and MindManager to organize facts for arguments, depositions and witness examinations.
- B. MCLE Credit: This course qualifies for 1 (one) hour of Louisiana MCLE credit, including an hour of law office management (a total of one hour of MCLE credit). To obtain credit, you need to do the following two things:
1. Pay \$49.99 for the course at PayPal. The movie is free; we charge only for you to receive MCLE credit.
  2. Fill in the form on the web page on which the video is embedded. To obtain credit, you must include all requested form information, including: (1) your name; (2) your email address; (3) your Louisiana Bar Number, (4) your PayPal receipt number, and (5) the two “secret codes” that are set forth in the video to confirm that you have observed the entire video.

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II. White Papers

Attached are various white papers on the topics addressed in the video.



# Digital Workflow

The basics of scanning

## **The right tool for the job**

Many people have tried scanning, found it frustrating, and given up on the idea of using a scanner. On the other hand some people have had no trouble getting started with scanning. The difference between success and failure is usually tied to the scanner.

Multi-function devices (e.g. scanner, copier, printer all-in-one) have become prevalent and many lawyers believe that they can use these devices as part of their scanning workflow. In almost every case this is a recipe for failure, or at least a path to more problems. If you are serious about scanning then you need to get a machine that is dedicated to on purpose only: scanning. And this advice applies even if you have an expensive workstation printer/scanner.

The reason why you want a dedicated scanner is this: you need the machine to be set to default settings that are optimal for scanning. If the machine serves other purposes then the odds that the default scan settings will be accidentally changed are greater.

## **A short 'war story'**

The electronic filing system that is used in federal courts requires PDF files to be uploaded. There is no page limit on filings, but there is a file size limit. I know of at least one attorney who had problems filing a 4 page document because he had scanned the document in at exceptionally high settings. He was shocked that his scanner could be the source of the problem. What kind of scanner did he have? A very expensive high-end workstation printer/scanner.

## **A scanner recommendation**

If you don't know what kind of scanner to get (or if you have a multi-function scanner and have realized that it is not optimal), then just buy a Fujitsu ScanSnap. As of this writing the current model is the S510. The Mac version is called the S510M. The ScanSnap retails for about \$400 on Amazon.com, but you can often get it for less. It comes bundled with Adobe Acrobat, which is worth at least \$200.

The ScanSnap is dead simple to set up and use. It has a 50 sheet document feeder and one large button. You put the documents into the feeder and push the button. That's it. If you get a mis-feed just stop the scan and re-feed. You can mix and match letter size and legal size and it figures out the difference on the fly. It reads the front and back of the paper at once and tosses out blank pages. It will automatically rotate documents that have been put in upside down, or have the wrong orientation.

In short the ScanSnap was built to work easily and reliably in almost any work environment. People who start with this scanner never have serious problems.

### **Configuring the scanner**

After you have gotten the right scanner the only important thing left to do is to configure it properly. If you aren't generally going to scan in color (and you really shouldn't scan to color unless you have a good reason) then you need to set the default to 'black & white.' Sometimes you have the option to set to 'greyscale,' but avoid this. Black & white scans create the smallest file size, and that's what you usually want. (Especially if you are going to upload to federal court as part of an e-filed document).

Many people set scan quality to 200 dpi, but if you want to OCR (see below) your documents then you might consider setting the quality to 300 dpi. Just remember the higher the scan setting, the larger file size and the longer it will take to scan. On the ScanSnap scanner the settings are 'normal,' 'better,' 'best,' and 'excellent.' I have my default set to 'better,' which I figure is about 300 dpi. I set the scanner's color mode to 'black and white,' and the scanning side to 'duplex scan' (i.e. double-sided).

### **Scan output**

The next thing to configure (if you have the option) is where you want your scan job output to, and what file name you want to give it. I set my ScanSnap to output to a folder called '2008 Scan jobs.' Next year I will create a new folder and called it '2009 Scan jobs.' The scanner automatically puts a completed scan into the target folder and gives it a file name based on the date/time of the scan. The first thing I do after the scan (unless I'm interrupted in which case I come back to the document later) is rename the scan and put it in the proper folder. For example, I'd rename a scan of a letter I received in the Hodgkins case to, say, '2008\_03\_11 Marcus ltr to EES' and then file that in the 'Correspondence folder in the main folder called 'Hodgkins Case.'

The nice thing about this system is that I have two copies of everything I scan. One is in the '2008 Scan jobs' folder where it is sorted by date of scan, and the other is placed in the electronic case file with a name that is understandable. Every month or so I go into the '2008 Scan jobs' folder and delete documents that are several months old. The value of this folder is that it allows me to find documents that I just recently scanned quickly. And, if it turns out that I misfiled the document I can find it quickly here. Also, some documents aren't really important enough to store. For example, if I just need to email someone a document, I usually don't save it to a special folder. But I do have it in the 'Scan jobs' folder for a few months in case I need it. And, of course, my email system will have a copy for as long as it keeps old emails.

### **Optical Character Recognition (OCR)**

If you want to be able to text search the documents that you scan then you need to OCR the documents. Whether you decided to OCR all of your documents is something that

you need to decide upfront. You can always OCR specific documents later on, so there really isn't a big need to OCR up front. The benefits of OCRing every document is that it gives you a powerful way to find information across all of your documents. The downside is that it takes longer (at least 5 times longer) to scan a page and then have it OCR'd. Also, OCRing a document makes the file size slightly larger (generally about 25%).

I generally don't OCR my documents, with the exception of documents that are produced or received in my litigation cases as part of the discovery process. In that situation, my workflow system is to 1) scan, 2) OCR, and then 3) bates-stamp. It's important to note that if you plan to bates-stamp a document you usually must OCR it before you bates-stamp, otherwise you won't be allowed to OCR (for technical reasons that aren't very interesting so I'll spare the details).

### **Scanning challenges**

If you have a good scanner, set to the right settings, and a simple and consistent workflow, then you'll have no trouble with scanning. In the beginning you'll have to learn to handle small problems like making sure that the pages are all scanned (if you get a double feed and miss a page then you'll never know about the problem until it's too late). Sometimes the scanner will jam or mis-feed, so you shouldn't just leave it to scan unattended.

If you have really large scan jobs then consider hiring a company to do the scanning for you. The cost of scanning at a commercial service is now the same as (or possibly slightly cheaper than) printing. Commercial bureaus have excellent quality control (or at least better than you're likely to have) so the problem of mis-feeds and so forth will disappear. And they'll usually be able to OCR the documents and a very small additional cost.

When you first get started scanning you'll have a tendency to keep the paper around (just in case). This actually will create a problem that isn't obvious until you experience it. If you are trying to become completely paperless you need to know which paper has been scanned already and which paper needs to be scanned. If you throw the paper away immediately after you scan it (as I do) then you don't need to keep track of what's been scanned and what hasn't been scanned.

So what do you do if you aren't willing to throw out the paper that has been scanned? Get two stamps: one that says "SCANNED" (which you will use to stamp any paper that has been scanned already), and another that says "NOT SCANNED" (which you will use to mark paper that you don't want to scan, so you know that it doesn't need to be scanned). With this system you can assume that any paper that hasn't been stamped needs to be scanned.

# Digital Workflow

Metadata is usually harmless, but not always

## **What is metadata?**

Strictly speaking metadata is ‘data about data,’ of any sort in any media. Of course all data is ‘about something,’ and is therefore metadata. In the context of modern computers metadata usually means information about a computer file other than what was created by the human author(s) of that file. For example, metadata would include file attributes such as name, size, data type, or where it is located, how it is associated, ownership, etc.

In other words metadata is usually file information that is created by a computer at the same time that a human being is creating the information that will be contained in the file.

## **Why is metadata considered bad?**

Ordinarily metadata isn’t bad. But when people attempt to hide the fact that a file has been altered in a certain way those people consider metadata bad because it thwarts that effort. Sometimes people want to keep certain facts confidential, and with legitimate reason. In that case, metadata might be problematic if it could be easily examined by anyone with access to the file. Usually, though, nobody cares if someone else can see who created their document, or when it was created.

## **Tracking changes in word processing documents**

When a computer keeps track of changes to a word processing document the resulting record of changes can be considered ‘metadata.’ This type of metadata is by far the greatest threat to most attorneys.

## **The solution to ‘bad metadata’**

Obviously the solution is to get rid of risky metadata, but how? Generally speaking the solution for text based documents (e.g. Word or WordPerfect documents) is to convert them to PDF before sending them out. However, since the method for creating PDFs from Word or WordPerfect generally involves capturing a ‘phantom print job,’ anything that would be revealed in that print job would wind up as visible text in the PDF. So, if you had your preferences set to print out ‘tracked changes’ then the PDF would show the changes. But this wouldn’t be metadata; it would be worse: it would be plainly visible on the page.

If you are a transactional attorney, or if you simply must exchange native files with someone outside your office, then you should consider getting a program that scrubs out metadata. There are several types of programs in this category to meet the needs of small firms as well as large firms. For small firms using Microsoft Word the built-in Document Inspector will usually get the job done. Another product to try is by the Payne Consulting

Group's [Metadata Assistant](#), which removes metadata from Word, Excel and PowerPoint files.

### **Convert to PDF**

As we said, the best policy is generally to convert text documents (or spreadsheets and Powerpoint documents) to PDF, if possible. Unless it's absolutely necessary to share the native file this is the safest method. Just remember to examine the resulting PDF to see if you accidentally included tracked changes, and that it's otherwise devoid of any serious problems. The nice thing about PDFs is that any serious problems will be visible right on the page.

### **Ethics of examining metadata**

Bar associations are starting to examine the question of whether and when it might be permissible to purposefully look at an opposing attorney's metadata. The ABA adopted a position that it was permissible to examine metadata, but New York and Alabama have taken opposing views. We have attached the ABA provision (06-442) and the Alabama provision (which cites and discusses the New York rule), along with a brief article.

Louisiana, has not taken a position on this subject as yet.



# Digital Workflow

File retention obligations

## **How long should I keep paper?**

Once people realize the benefits of scanning and decide to do it they usually have one last question: how long should I keep the paper after I scan it? My advice is always to get rid of the paper as soon as possible. A friend of mine who long ago found Nirvana in being completely paperless says he thinks it should be illegal to sell scanners without a paper-shredder attached.

Still, people wonder about getting rid of paper and believe there are special rules that require them to keep certain papers. Which ones? They're not sure so they tend to keep most of them—just to be sure they comply with that mysterious bureaucratic edict.

## **Myth #1 the law makes me keep paper records**

The other day I came across a web post entitled [How To Store Your Tax Returns](#), which offered the following advice:

Since you should actually KEEP your tax returns and associated financial documentation, you want to have a systematized method for organizing these papers. Why keep them? First of all, if you ever get audited, you'll really want them. Secondly, in case of your death, these documents may be needed in the settling of your estate. Whatever the situation, you'll need these in paper form and not digital scans.

There was no reference to any IRS rules or regulations; just the author's opinion that the government requires citizens to keep tax documents in paper form.

## **What the IRS actually requires**

In 1997 the IRS issued a bulletin (Rev. Proc. 97-22) to address the issue of electronic records. A review of this decade old document shows that electronic records are, in fact, allowed by the IRS, as long as certain basic requirements are met. Here are the requirements for electronically stored documents ("ESD"):

- ESD must be 'accurate and complete' versions of hard copies
- ESD must have reasonable controls to assure integrity and accuracy
- ESD must be periodically checked to insure integrity
- ESD must produce 'legible and readable' hardcopies

- ESD must be ‘legible and readable’ when displayed on computer screen
- ESD must not be outside control of taxpayer (i.e. IRS must be able to get access if they direct you to grant them access).
- Tax payer is allowed to use more than one ESD system, as long as each complies with the above requirements.

Obviously, these requirements are reasonable. More importantly, they are quite easy to comply with. You aren’t going to use an electronic storage system that is unreliable and produces unreadable information. And you are certainly going to make sure that your electronic information is properly backed up. Therefore, your system is going to comply with IRS regulation 97-22.

### **Natively electronic information**

Emails are a good example of information that is in electronic format, so obviously the law doesn’t require you to convert all your emails to paper so you can store them. And the same is true of things like spreadsheets and computer databases, which aren’t even easily converted to paper form.

The recent amendments to the Federal Rules of Civil Procedure were designed to deal with electronically stored information, which is known by the acronym ‘ESI.’ These rules contemplate that such information will often be best handled in ‘native format.’ In short, the trend is actually in favor of storing information in digital form. The law has been changed to adapt to this practical reality, and people who persist in saying that paper records are required are speaking more out of fear than knowledge.

### **Louisiana Law**

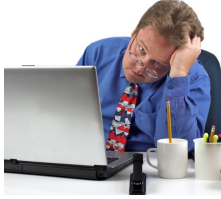
Louisiana Revised Statute §9:2612 deals with electronic records and provides in part “If a law requires that a record be retained, the requirement is satisfied by retaining an electronic record of the information....” The statute goes on to list requirements that are basically similar to the IRS Rev 97-22 list. Revised statute §9:2607 states that “a record or signature may not be denied legal effect or enforceability solely because it is in electronic form.” And it goes on to say that “a contract may not be denied legal effect or enforceability solely because an electronic record was used in its formation.” In short, “if a law requires a record to be in writing, an electronic record satisfies the law.” *Id.*

### **Exceptions to digital storage**

Some documents require the paper original, but there are not many such examples. Original promissory notes are probably still required to be kept because, in order to cancel a mortgage, you need the original note. At least, that’s true in most states. Original wills & testaments may need to be kept in paper form, and perhaps some stock certificates.

Use your common sense and you’ll find that there aren’t a lot of documents where you need to keep the original paper copy. Maybe you’ll err a little on the side of caution, but for God’s sake don’t keep your tax returns in paper form. Think about it for a second, even if you lost your copies of the tax returns, do you think the IRS would lose their copy of your

returns? And what format do you think that they keep their copies of your return in? Not in paper, that's for sure.



## Digital Workflow

How to make & use digital signatures

### **Digital Signatures make sense**

Digital signatures save time, which obviously translates into monetary savings as well. And, by not having to print out documents just to sign them you'll also reap rewards of being environmentally conscious.

You'll want to have a digital signature that you can use in a couple of places: (1) your word processing programs, where you'll insert it in your 'form letter template', and (2) in Adobe Acrobat, where you'll create a custom stamp that you can use to place your signature into PDF documents that you receive and want to sign (if you receive a non-PDF document you can just convert it to a PDF). With these two forms of 'digital signatures' you can pretty much sign any electronic document without having to print it out.

### **Creating Digital Signatures**

Creating a digital signature can be intimidating for those who aren't very comfortable with using Adobe Acrobat and Adobe Photoshop Elements. The method I'm about to describe assumes you have both of these programs, as well as a decent color scanner. I'll offer some alternatives later on, but this is the cheapest way to create signatures. And, doing it yourself allows you more control over what kind of signature you wind up with.

First step is to take a sheet of plain white paper and write your signature several times. If you want your signature to be in color (why not?) then use a blue pen. I suggest making at least two signatures: one with a thick marker, and another with a thin stroke pen. This will give you at least two options for signatures. Some people like to scan in a signature with just their first name, and this makes sense. The point is: now is the time to figure out how many different types of signatures you want. Put them all on one white page and then scan that using a fairly high resolution, with the color option on.

So to review, here are the steps in order:

1. Write as many different signatures on one white paper.
2. Scan that paper at high resolution, in color. Scan to PDF if possible, but if you can't don't worry, just make it a .JPG or .TIFF or any kind of image file.
3. Open that image file in Adobe Photoshop, or Photoshop Elements. The process will be the same in either program.
4. Save the original file on your desktop.

5. Choose 'Crop Tool' and crop the first signature that you are going to work on (from among all those on the single page).
6. SAVE AS a new file. (so you can go back to the page with all of the signatures later)
7. Select the **MAGIC WAND** tool, and click in the white area around the signature.
8. Select **INVERSE** from the **SELECT** menu (this sequence can be described as **SELECT > INVERSE**). Doing this step will change the selection area from step 7 so that only the signature itself is selected.
9. Choose COPY
10. Choose **FILE > NEW > IMAGE FROM CLIPBOARD**.
11. Paste your selection here. You should see your signature against a checkerboard background. If you see all white then something is wrong. Go back and find a way to paste your selection into a 'transparent background.' You want to create a signature that has only your stroke and no white background.
12. Save this file as a .PNG file on your desktop. This is the signature you can now paste into your word processing program, and use as a stamp in Acrobat. If you want to save it again as a .GIF that's another option. The important point is to make sure to treat this file as a valuable resource. You just went through a lot of steps to create it and you don't want to do that again.
13. Go back to step 4 and open the first file and repeat the process for each signature that you want to have in digital form.

### **Adding Signature to Microsoft Word**

If you want to add your signature to a Word document all you have to do is copy it and paste into the document. You can move it around by using the indent markers, or you can paste into a table. But, the best thing to do is create a form document that is preloaded with your firm's letterhead, and all of the information you usually put into the letter. Once you do that, your signature will already be loaded and placed in the right location.

Once you've worked on your document and it's ready to go, you can avoid printing it by simply saving it as a PDF document and then emailing it to the recipient. If you absolutely have to print it to send it, that's okay too. At least your secretary won't have to wait for you to sign it. You can send it to her and she can print it out and mail it. So, either way, you're saving time and making things easier.

Once you've finished the letter, don't forget to save the PDF copy into your electronic file. That way, if you ever need to find a copy of the letter again (to review, or print out), it's only a few mouse clicks away.

## **Creating a Signature Stamp in Adobe Acrobat**

In addition to having a signature pre-loaded into your form letter, you'll want to be able to place your signature into documents you receive by fax or email. For example, let's say you get your faxes by email (if not, then we need to talk). One of the faxes is from someone that needs your signature before they can approve payment to you. Obviously, you want to turn this around as quickly as possible. The fax arrives as a PDF, so you open it up in Acrobat. Wouldn't it be nice if you had a special stamp in Acrobat that you could apply in the space where your signature goes? Then you could save the document with the new change and then email it to the recipient. This would take you about 2 minutes, where waiting for the printer and then the fax machine might take 10 minutes or more.

Here are the steps to creating a stamp in Acrobat using the signature file that you've already made based on the steps outlined above.

1. Open Adobe Acrobat (this won't work in the free Reader program; you need the full blown version of Acrobat).
2. Go to **TOOLS > COMMENT & MARKUP > STAMPS > CREATE CUSTOM STAMP...** (that's a lot of menu choices, but you're wily and you can do it!)
3. From the dialog box, **BROWSE** for the image file you want to use.
4. Next when the new dialog box appears, create a new category called 'My Signatures' or something like that.
5. In the next entry field type in the name of the stamp. For example, "Ernest Svenson BLUE" if the signature is to be distinguished from the black ink version.
6. Click OK and you're all done.

From now on, you'll be able to navigate to the signature by going to **TOOLS > COMMENT & MARKUP > STAMPS > [NAME OF YOUR CATEGORY] > [NAME OF STAMP]**.

Once you've selected your stamp you simply click in the place where you want it to go. If you hover around with your mouse you'll find that in the corners you can drag the signature to make it smaller or bigger. Also, if you hover around you'll see a 4 point symbol that means you can drag the whole signature around to place it more precisely, after you've initially pasted it in.

And if you need to type in some information next to your signature, such as the date, just use the typewriter tool: **TOOLS > TYPEWRITER > TYPEWRITER**. You can make the text from this tool bigger or smaller, as well as dragging it around to suit your taste.

## **Other options for creating digital signatures**

If you don't want to bother with the hassle of scanning your signature you can hire someone to do it for about \$30. A company called [vLetter](#) will do it. Basically they will take a scan of your signature and turn it into a font for you. The turn-around time is about 2 weeks. It's simple to turn your VLetter Signature into an Acrobat stamp. Just choose the font in Word and create a PDF. Then follow the other steps for making it into a stamp.

We can't vouch for the reliability and so forth of this method as we haven't tried ourselves, but it seems like it would be pretty easy to do. But you do still have to scan in your signature to begin with.

## **Flatten your signature**

If you think about it, when you paste your signature into a PDF document it's really just an object on a top layer of the document. Someone with the full copy of Acrobat could copy that object and do mischievous things with it. So, if you're sending the document as a PDF file you might want to 'flatten' it first. Basically, this is the process by which you smooch all the layers into one. And at that point there is no separate layer for anyone to grab onto.

Chances are your copy of Acrobat doesn't have the **FLATTEN** command. It would be at the bottom of the **DOCUMENTS** menu. If you don't then all you have to do is copy the script below and save it as a text file. But you'll have to rename the extension of the file from .TXT to .js.

```
function Flatten(boolCurrentPageOnly) // Takes a boolean argument
{
var i
// Give them a chance to back out
i = app.alert("Are you sure you want to do this?", 1, 2)
if (i != 3) { // If they didn't click "No"...
if (boolCurrentPageOnly) // Flatten either this page...
this.flattenPages(this.pageNum)
else
this.flattenPages() // ...or all pages
}
}
app.addItem({
cName: "Flatten current page",
cParent: "Document",
```

```
cExec: "Flatten(true)");  
  
app.addItem({  
  
  cName: "Flatten all pages",  
  
  cParent: "Document",  
  
  cExec: "Flatten(false)");
```

After you've made this file, which you should call "flatten.js" you'll put it in the folder for Acrobat that is called "JavaScripts." The location of this file depends on whether you have a Mac or a PC and which version of Acrobat you have. But, once you've placed it in the JavaScript folder (which you should do when you don't have Acrobat running), it will create a FLATTEN command under the DOCUMENT menu.

Run the command whenever you've signed a document that you'll be sending as a PDF. You can download a copy of the script at [this link](http://tinyurl.com/6fauuw): <http://tinyurl.com/6fauuw>

# Digital Workflow

Backing up is imperative, and not that hard

## **Backup is a 'no brainer'**

Paper files can't be backed up easily, but digital files can. So why on earth doesn't everyone backup their files? Many people just don't think about it while others consider it but think of it as too challenging. Backing up is not that hard, and if you avoid it and wind up losing your data you'll curse yourself. And your clients will too.

## **Backup basics**

The basics are fairly, well, *basic*. The usual drill is you set up a system that automatically (usually once a day) makes a backup of some portion of your network drives or your local drives. The backup is stored on a backup tape (although nowadays tape backups are perhaps not as prevalent). Ideally, that tape is then sent to another physical location because it would do no good to have the backup tape in the same building as the original data. Why not? Well, if a terrible fire consumed the entire building it would destroy both the data and the backup of that data.

## **Offsite backup is mandatory**

Large enterprise companies have systems to courier backup tapes to other locations, and then to retrieve them if necessary. Small companies don't have this kind of ability, so what can they do? Fortunately, in recent years the cost of storing information on the Internet has lowered to the point that it's economically feasible to store backup information 'in the cloud' (as the Internet is often referred to by technophiles).

## **What backup system do I need?**

There are so many companies that do this kind of thing that it would be pointless to name them here. In any case, you'll probably need to hire a consultant to help you determine the best backup system for your law office. If you're a solo or very small firm you might be able to get by using some of the very basic services without engaging a consultant.

## **Down & Dirty solution**

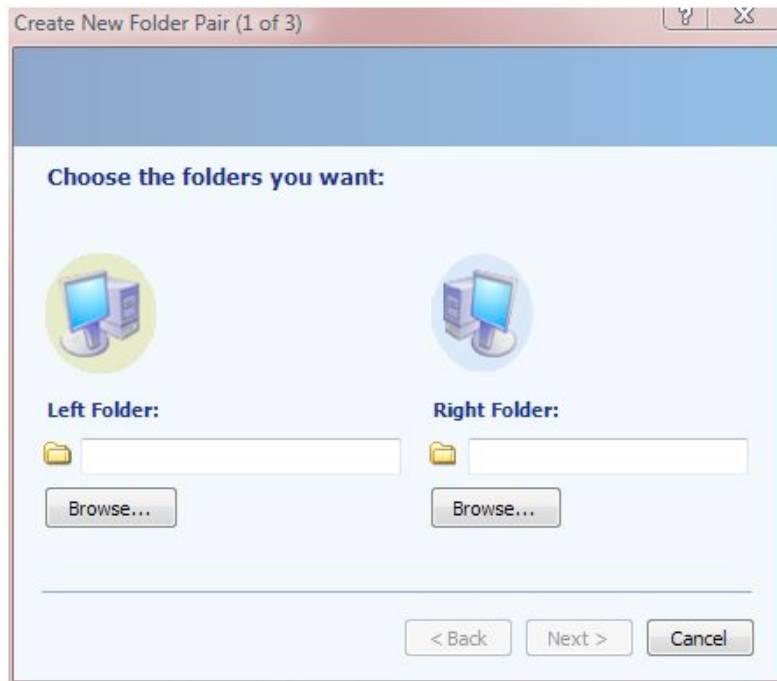
One quick solution (imperfect, but better than nothing) is to simply copy all of your key information to an external hard drive that you keep with you at all times. Small external drives that store 500 GBs of data can now be had for under \$200. And if you use Microsoft Windows you can use a free Microsoft program called SyncToy to automatically synchronize your data to the external hard drive (Mac users with the latest operating system can use the built-in Time Machine feature). A short tutorial on how to set up SyncToy is set forth on the succeeding pages.



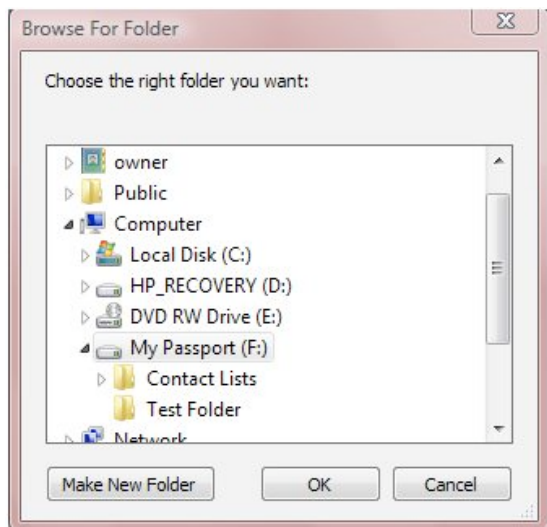
## Getting Started With SyncToy

Follow these steps to download, set up and run SyncToy.

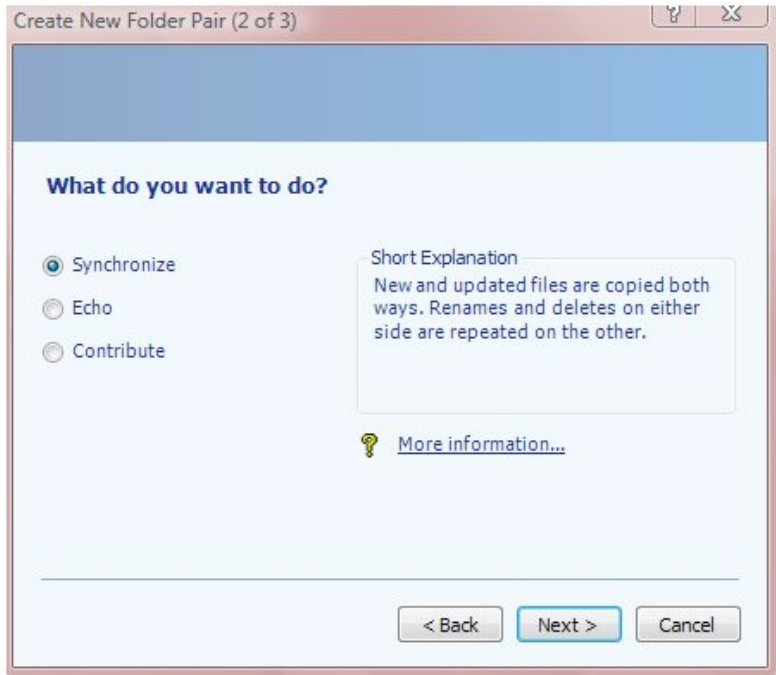
1. Download SyncToy to your computer by clicking [HERE](#):
2. If you are not sure whether you are running 32 or 64-bit Windows version then choose the first option which is 4.2 MB.
3. Open the program by clicking on Start > All Programs > SyncToy 2.0 and select **Create New Folder Pair**.



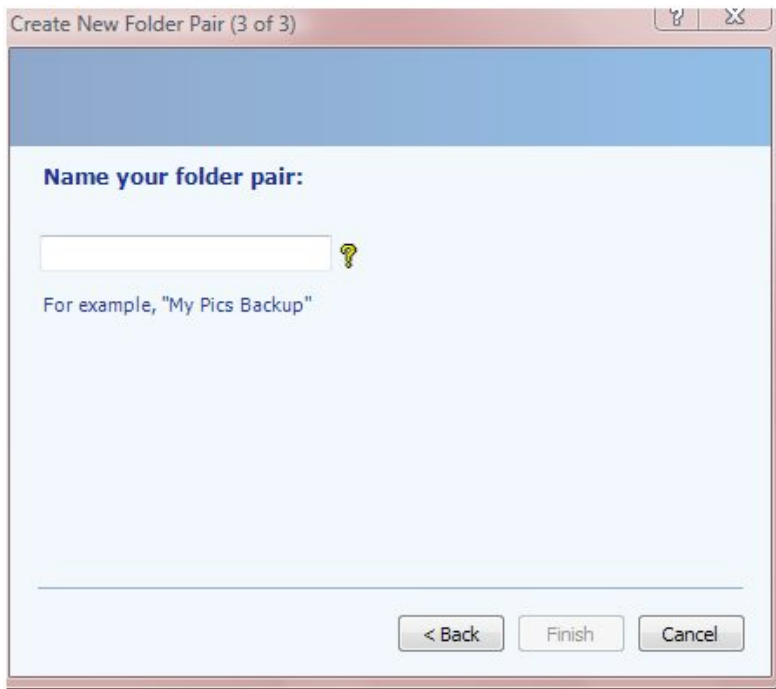
4. Select **Browse** on the left side to navigate to the folder you are choosing to back up. Click on the folder to select it and then select **OK**.
5. Click on the Right Folder Browse button to select the location where you are backing up to. This will be on an external drive of some sort. The drive will be found under My Computer.



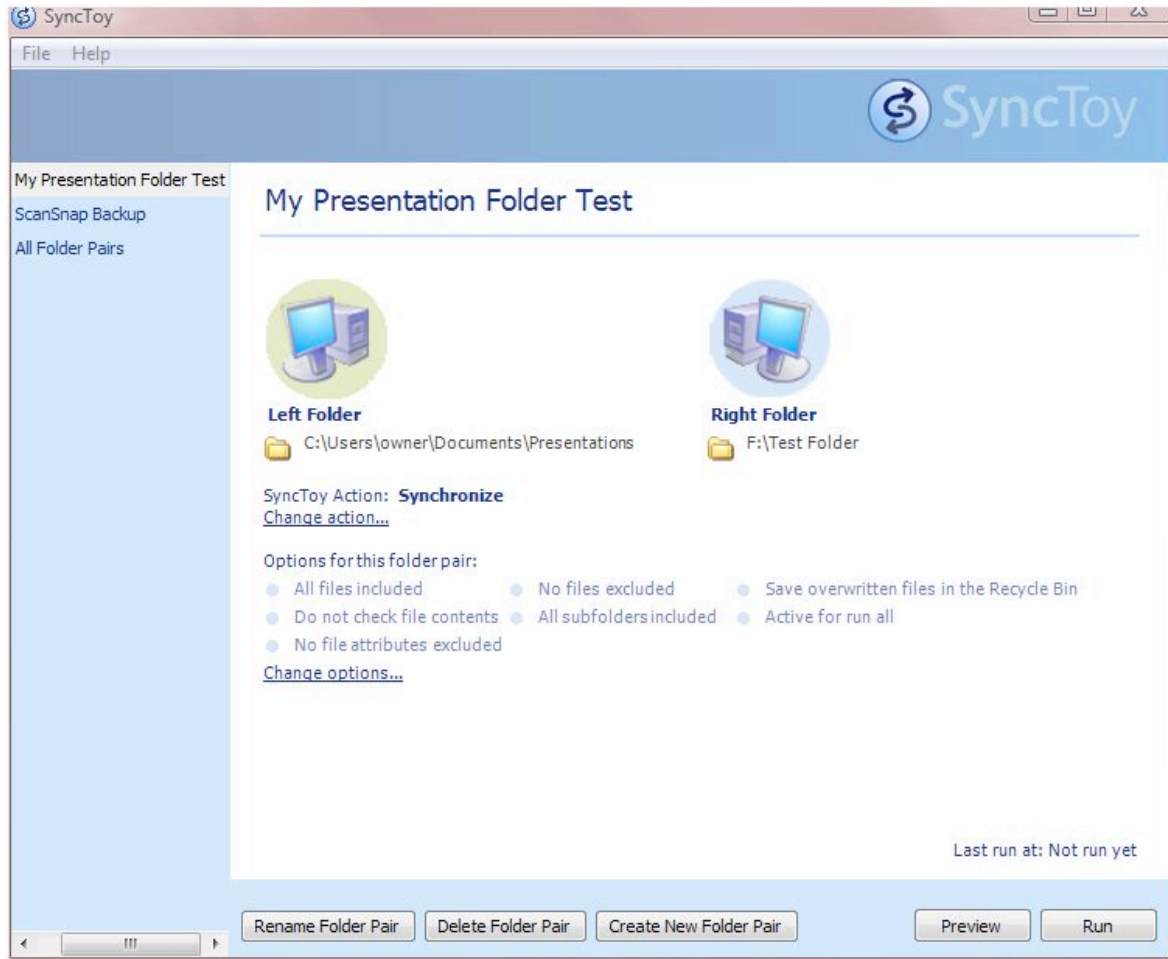
6. Click on the folder you are Syncing to > Click **OK** and **Next**. Now choose your form of Synchronization. Selecting each radio button will provide a description of each option. Click on **Next** after deciding which option.



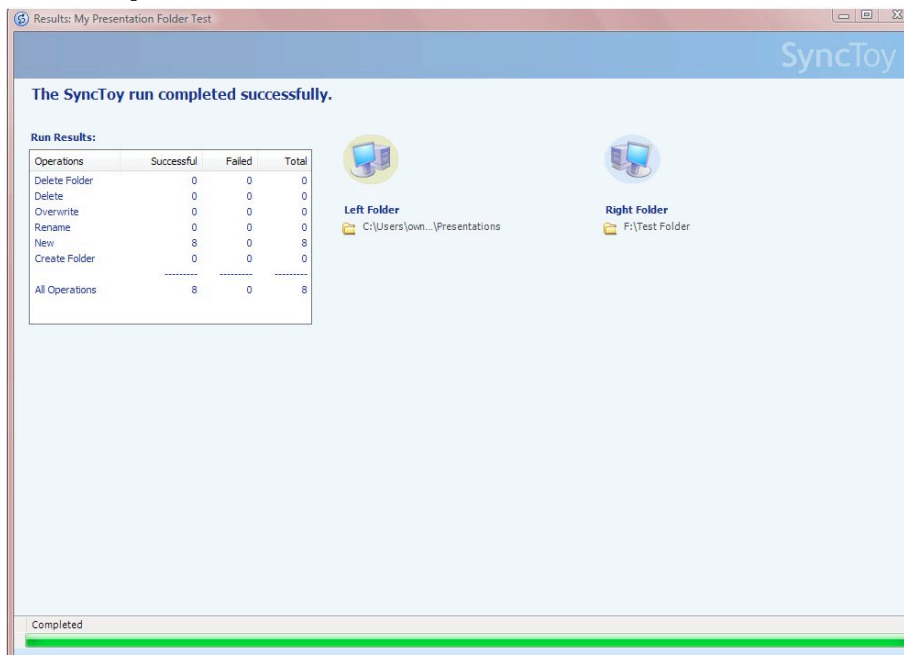
7. Name your folder pair. The name can be up to 255 characters long and must be different from your other pair names. SyncToy will validate the name and if the name typed is not valid, the Finish button will be greyed out. If the name is unique and valid the Finish button will be enabled. Select **Finish**.



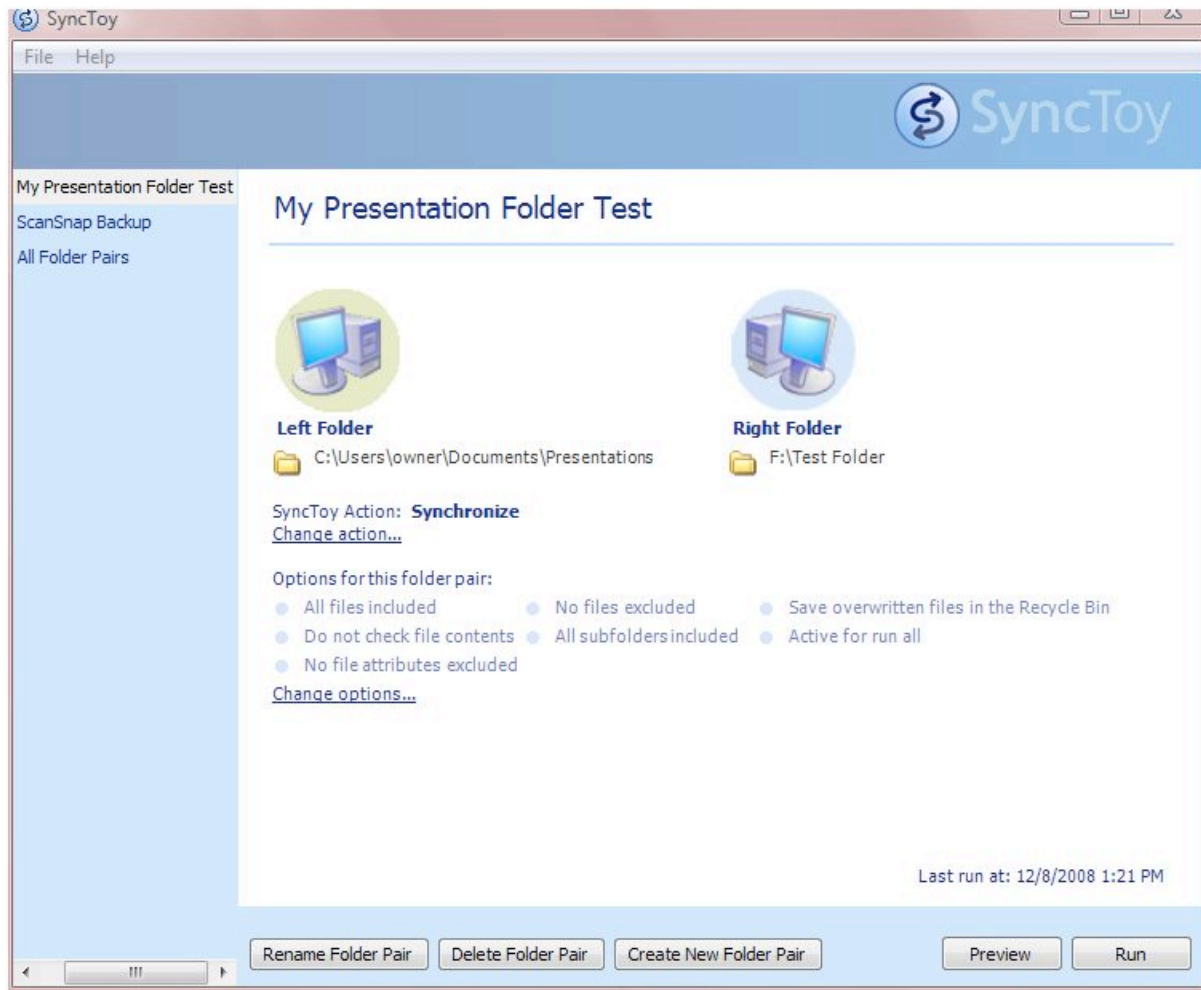
8. SyncToy will display the folder pair, the action and the selected options. The named folder pair will appear in the left menu and is available to select and preview or run at this time. Select **Run**. You can always return to delete, rename or add to the selection.



9. A Progress bar will be on the bottom of the screen with the results displayed on the top left. Click **Close** when complete.



10. Now Preview the results of that Sync by highlighting the **Folder Pair** and choosing **Preview**



11. You may also browse to the back-up location for confirmation. For additional help click on the Help button on the top left of your screen.

# SCHEDULE SYNC TOY

While you do not have to schedule SyncToy to use it, some users may find it helpful to schedule recurrent SyncToy runs. Perhaps you have a folder pair that takes a long time to sync and you want to run SyncToy in the middle of the night, for example.

SyncToy does not provide a user interface to schedule folder pairs to run at designated times. However, there is a method to schedule tasks using the Microsoft Windows operating system.

## *WINDOWS VISTA*

To schedule a task using the operating system:

1. From the **Start** menu, select **All Programs - Accessories - System Tools - Task Scheduler**.
2. Select **Create Basic Task** in the **Actions** pane on the right.
3. Add a Name and Description and select **Next**.
4. Choose when you want the task to start and select **Next**.
5. Choose date/times (if applicable) to run task and select **Next**.
6. Choose Start a Program option and select **Next**.
7. Select **Browse** and locate the SyncToyCmd.exe.
8. Type "-R" in the Add Arguments textbox. -R all by itself will run all folder pairs that are active for run all. If you want to run just a single folder pair, add -R "My Pair" to the end of the command line.

Note: If the folder pair name contains a space, surround it with quotation marks, as the example above shows. For another example, assume that SyncToy is in the folder named C:\Program Files\SyncToy 2.0\ and that you want to run a folder pair named "My folder pair." Enter the command line as follows, including the quotation marks: "C:\Program Files\SyncToy 2.0\SyncToyCmd.exe" -R "My folder pair." Note that there are two sets of quotation marks in this case: one is around the path to the SyncToy program file and the other surrounds the folder pair name.

## *WINDOWS XP*

To schedule a task using the operating system:

1. From the Start menu, select **All Programs - Accessories - System Tools - Scheduled Tasks**.
2. Select **Add scheduled task** to start the Scheduled Task Wizard. You will see a list of possible programs to run.
3. Select **Browse** and locate the SyncToyCmd.exe.
4. The wizard will next prompt you to enter how often you want to run the scheduled SyncToy (for example, daily, weekly, et cetera). Select a frequency.
5. The next page asks when to start the task. Select a start time.
6. The next page asks for the user name and password to run the program under. Enter your user name and password.
7. The final page contains an option to open the properties dialog when the wizard ends. Select this checkbox.
8. Modify the **Run** textbox to include the -R command line option. -R all by itself will run all folder pairs that are active for run all. If you want to run just a single [folder pair](#), add -R "My Pair" to the end of the command line.

Note: If the folder pair name contains a space, surround it with quotation marks, as the example above shows. For another example, assume that SyncToy is in the folder named C:\Program Files\SyncToy 2.0\ and that you want to run a folder pair named "My folder pair." Enter the command line as follows, including

the quotation marks: "C:\Program Files\SyncToy 2.0\SyncToyCmd.exe" -R "My folder pair." Note that there are two sets of quotation marks in this case: one is around the path to the SyncToy program file and the other surrounds the folder pair name.

Note: With this version of SyncToy, it is now possible to schedule execution of a folder pair in the following scenarios:

1. No one is currently logged into the machine.
2. A different user is logged into the machine.