Technology in the Office and on the Go









I home I member area

Contact us Google SBM



Practice Management Resource Center

helping members build and strengthen their law practices

resources

online seminars NEW!

helpline

library

ed center

customized training & consulting program

Seminars/Workshops Tips & Tools Seminar May 3, 2011 [More]

PMRC Tip of the Week

Tip Archive

Settings Changes to Quickly Mute Android Phones —4/26/11

If you use an Android phone, here are two settings changes to guickly mute incoming calls. Both of these settings are found in Settings > Sound > Smart Sensor Settings. The first setting, Double Tap to Silence, allows you to tap the screen twice in quick succession to silence the ring tone on an incoming call. The option to answer the call remains visible but there is no accompanying sound. The second setting, Smart Profile: Face Down, allows you to silence an incoming call by simply turning the phone face down. The Face Down setting only works while the phone is ringing. If your phone is face down prior to receiving a call, the phone will still ring.

To reach a practice management advisor, call the PMRC Helpline at (800) 341-9715 or e-mail your questions to pmrcHelpline@mail.michbar.org.

The PMRC Tip of the Week is a service of the Practice Management Resource Center. It is not intended as legal advice, nor is it an ethics opinion.

Helpline (800) 341-9715

Do you have a question about the retention of old files, the development of a conflict of interest checking system, or the purchase of digital equipment? Call the PMRC Helpline to receive informal advice and information regarding practice management resources and emerging technology. To reach a practice management advisor, call the PMRC Helpline at (800) 341-9715 or e-mail your questions to pmrcHelpline@mail.michbar.org, More

Lending Library

The Lending Library contains a variety of law practice management publications for loan to SBM members at a nominal fee. Sample topics include: How to Start and Build a Law Practice, Winning Alternatives to the Billable Hour, Management Tools for Lawyers, a Survival Guide for the Solo and Small Firm Lawyer, Advice for Litigators, Marketing on the Internet, Virtual Law Practice, and much more. View Book Titles

Subscribe to the PMRC e-mail announcement list

Free Webcast

Lawyers Targeted For Fraud. Don't be a Victim!

TAON Alert

Lawvers With Trust Accounts are Impacted by the TAON Rule

Links to Resources

What's What on the Web

ABA Blawg Directory

ABA Law Practice Management Section

Lawyering on the Go

PMRC's Recommended "Green Resources" for Your Law Firm PDF

SBM Law Practice Management Section

SCAO Forms





2007 Economic Survey

Opening an Office

Trust Accounts

Conflict Waiver

Moving Your Office

- Checklist
- Timeline

Collecting Your Fee

Retainer Agreements

- Contingent Fee
- Hourly
- Flat Fee
- Criminal

Conduct a Meeting

Disengagement Letter

Law Office Marketing

View All Resources

Looking for a videographer, website designer, or other service provider? View all Professional Services and Products advertisers

Resources

Use our Resources page to find a wealth of information to assist with the day-to-day management of your law practice, including forms, checklists, "how to" kits, articles, and links to other essential resources. Find Resources

Topic areas include:

- · Calendaring and docket control
- · Career transitioning
- · Client relations and communications
- · Disaster preparedness and recovery
- · Financial management
- Insurance
- Management and employee relations
- Marketing
- Record retention

Educational Center

The Educational Center, located in the State Bar building, is equipped with 12 computer stations, to allow members and their staff to attend seminars and training sessions facilitated by our experienced practice management advisors. Members may also utilize this onsite facility to "test drive" software applications on an informal basis. Reservations may be made by calling the PMRC Helpline at (800) 341-9715. <u>Use the Ed Center</u>

Customized Training & Consulting Program

The PMRC launched its Customized Training and Consulting Program in June 2009, which is designed to offer the following services:

- Practice management consultations, which include an onsite review of management practices, an onsite progress evaluation (upon request), and the preparation of a Practice Management Consultation Report
- Customized training in software applications such as Time Matters and Adobe Acrobat, with sessions, which may be held at your law firm, at the State Bar building, or delivered through desktop sharing via the Web.

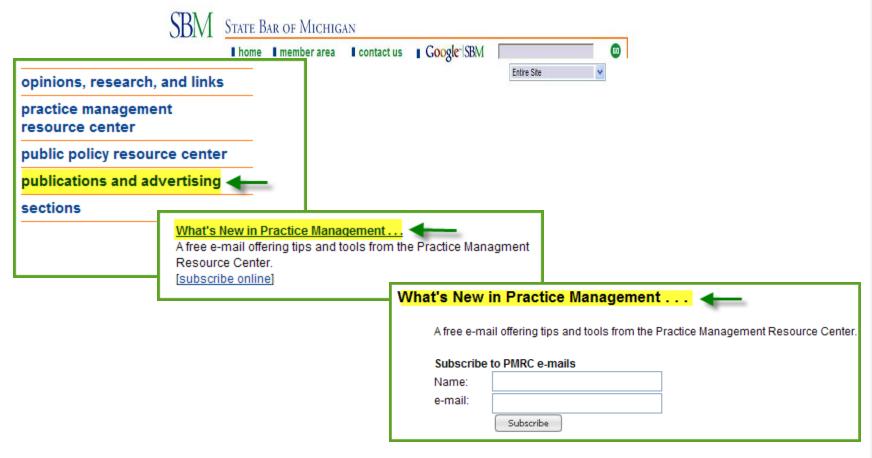
For pricing and scheduling information, contact our practice management advisors:

Diane Ebersole (517) 346-6411 debersole@mail.michbar.org JoAnn Hathaway (517) 346-6381 jhathaway@mail.michbar.org



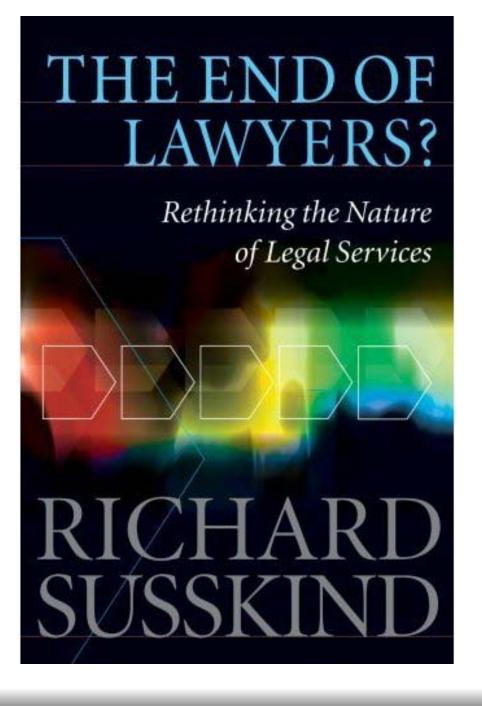
Sign up for a weekly Email from the PMRC offering newsworthy updates on the latest in practice management for law firms.

From the SBM homepage (http://www.michbar.org)





Expand your thinking.





"The End of Lawyers?" Lawyers need to work -

- More quickly
- More cheaply
- More efficiently

OR

To a higher quality

Using different methods of working



Incorporate the Thinking Learn the Technology

ABA Model Rule of Professional Conduct 1.1



- Lawyers need to know what technology is necessary and how to use it
- Lawyers who lack the necessary technical competence should consult with others who have the skills



Incorporate the Thinking Learn the Technology

ABA Model Rule of Professional Conduct 1.6

 Duty of confidentiality which extends to the lawyers use of technology

Secure your PCs

Secure your mobile devices

Carefully research SaaS applications



Secure Your Computers





Secure Your Mobile Devices





Implement a Redundant Back Up Plan

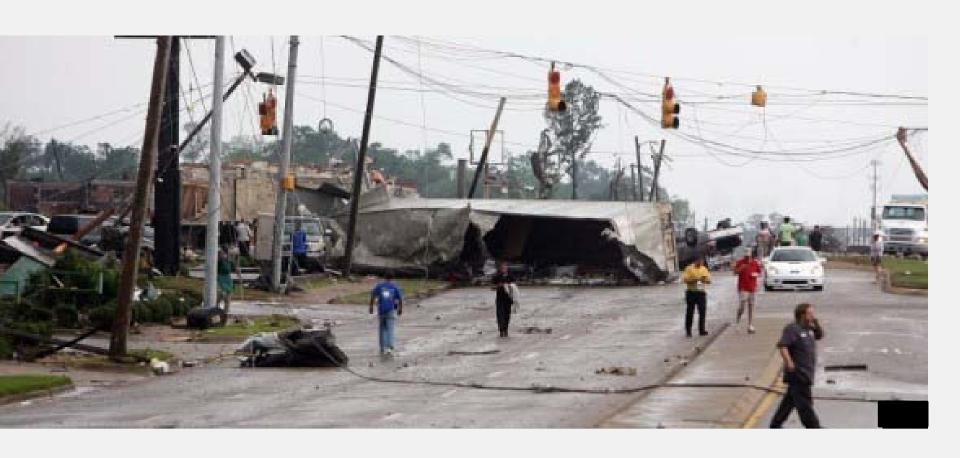
- Backup Redundant Backup Backup!
- Local Remote
- Automated
- Backup servers & applications
- Backup mobile devices
- Do test restores!

It doesn't have to be complicated! It isn't optional!













SaaS –Software as a Service

Before you subscribe.....

- READ the details of license agreement
- Determine data ownership provider or you?
- Who has access to the data?
- Know how to retrieve data if you decide to end service?
- Review provider's security and confidentiality policies
- Is data backed up by third party provider?
- Can you download data on regular basis for backup?



Don't Ignore Metadata





Don't Use Illegal Software

The potential liability for each copyright violation is \$150,000! Average out-of-court settlement is \$80,000

IF YOU

Buy academic versions of software to use in your office

Buy a single license and install multiple times

Find software that is free for personal use and you use it on your business computer

The Business Software Alliance (BSA) may

Show up with a U.S. Marshall and immediate exparte authority to inspect your computers.

There is no sympathy if you are in violation of the copyright law when inspected

The potential liability for each copyright violation is \$150,000!

Average out-of-court settlement is \$80,000

Solution

Conduct annual software audits

Keep all licenses in a central location

Back up your licenses, electronically or on paper



Learn About PDF Creation

Create using specialized applications
 Adobe Acrobat or Nuance PDF Converter

Create from your word processor application
 Word or WordPerfect

Create from web based applications

Cute PDF, PrimoPDF



WWW.YOURWEBSITE.COM

- Does your firm have a website?
- Are you looking for new clients?
- Website validation that your firm exists
- Be sure you own your domain name
- Learn about SEO (Search Engine Optimization)
- Have your email address @ your domain name
- Three ways to create a website
 Contract with independent designer
 - Use FindLaw, Justia, LexisNexis Build your own



Reward the champions of technological change in your practice.



What Is Next? Own IT!





Success Will Require

- Working
 - More quickly
 - More cheaply
 - More efficiently

AND

- To a higher quality
 - Using different methods of working



Technology Priorities

Your law firm should have in place systems that:

Provides efficient case management

Integrates all billing activities

Performs conflict checking

Performs document assembly

Has rules based docketing - calendaring

Supports less paper environment

Integrates with mobile devices



Personal Information Management Software

What does Outlook give you?

Names

Addresses

Telephone Numbers

Email

Websites





Personal Information Management Software

What does Outlook give you?

Appointments

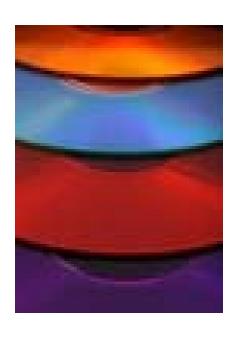
ToDos

Ticklers

Vacations

Anniversaries

Birthdays





Personal Information Management Software

What doesn't Outlook give you?

INTEGRATION!

Case Management
Report Generation
Billing (batch)
Trust Accounting
Conflict Checking
Time Tracking
Document Assembly
Secure Collaboration
Linked Events





Practice Management Software

aka: Sanity Software for Lawyers

"Red rope in a computer"

Matter-centric shared database





Practice Management Applications



- ✓ Amicus Attorney
- ✓ Client Profiles



- Practice Master, Billing Master, General Ledger, Trust Accounting, Accounts Payable
- ✓ Time Matters



✓ ProLaw







Proprietary Practice Management Pros, Cons and Considerations

- Is your hardware robust enough?
- Do you need a server to share data?
- Will you require technical assistance for upgrades?
- Are there software updates and charges?
- Are there a service agreements and fees?
- How frequent are upgrades and improvements?
- Will you need to purchase additional applications for billing etc?
- Will the system need to be customized to meet your needs?



Practice Management Options

SaaS Based

Clio www.goclio.com



Rocket Matter www.rocketmatter.com



Subscription/SaaS (Blended)

Credenza www.credenzasoft.com Credenza®





SaaS –Software as a Service

Before you subscribe.....

- READ the details of license agreement
- Determine data ownership provider or you?
- Who has access to the data?
- Know how to retrieve data if you decide to end service?
- Review provider's security and confidentiality policies
- Is data backed up by third party provider?
- Can you download data on regular basis for backup?



SaaS Pros, Cons and Considerations

- Requires Internet connection
- No new hardware to purchase
- No servers to maintain
- Painless upgrades
- No maintenance
- Subscription based payment
- No guarantee against price increase
- Available from anywhere you can access Internet



Is SaaS Where Practice Management Is Headed?

E-mail announcement received 02/09/11



Get Ready To Go Mobile—Time Matters® V11 Preview

On the go! In-between meetings! At court! Or at home! With Time Matters® v11 Mobility service where you go, your practice goes too. Imagine the freedom and power to practice in the palm of your hand.

Preview Time Matters Mobility and learn how you can convert downtime to additional billable hours and be more productive. See all the newest Time Matters enhancements available in version 11*, including new and updated third-party integrations, enhanced Time Matters, PCLaw® and Juris® integrations, support for Microsoft® Windows® Terminal Server, and more.

Title: Get Ready To Go Mobile—Time Matters v11 Preview

Date: Wednesday, February 23, 2011

Time: 2 – 3 P.M. ET

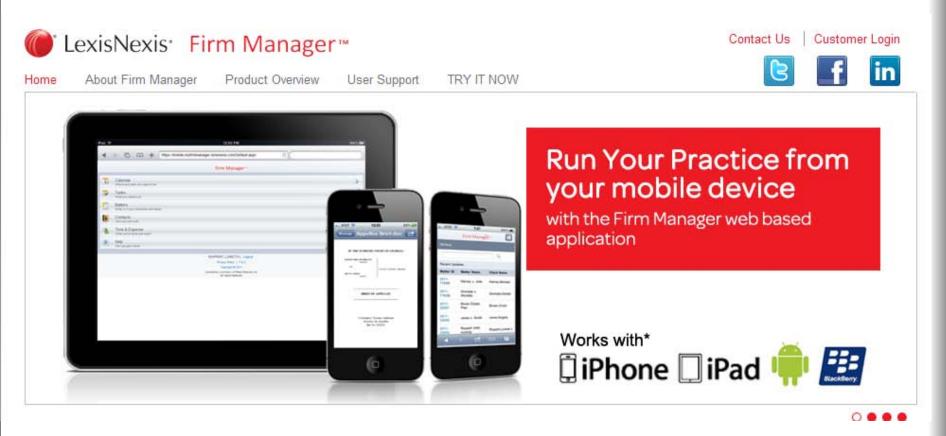
Presented by: Mark Deal, Document & Data Solutions, LLC

About the Presenter: Mark Deal of Document & Data Solutions is a Platinum LexisNexis® Certified Independent Consultant. Document & Data Solutions has 15 years of experience working closely with law firms to attain operational excellence through the use of technology.

▶ REGISTER NOW!



Is SaaS Where Practice Management Is Headed? Reviewed at ABA TECHSHOW





Practically Perfect Practice Management

Case Management

Time Tracking

Document Integration

Email Integration

Billing (Batch)

Trust Accounting

Conflict Checking

Calculate Dates

Document assembly

Mobile Access

Secure Collaboration

Report Generation

Contact Management

Export Data



Practice Management

Accessible from mobile devices!

Let me check on that when I get back to the office......



Mobile Phones

Which Operating System is Best?

Even the experts can't agree!













Sync Your Office & Phone

Start with Google Sync Services

http://www.google.com/sync



Synchronize your mail, calendar and contacts

Find out how to setup Google Sync services for your desktop and mobile devices.

PC PC

Get Gmail and sync your Outlook calendar with Google.



Get Gmail and sync your iCal and Address Book with Google.

Linux

Get Gmail and sync your Calendar with Google.

Android

Sync Gmail, Calendar and Contacts with your phone.

BlackBerry

Get Gmail and sync your Calendar and Address Book with Google.

Symbian S60

Get Gmail and sync your Calendar and Contacts with Google.

iPhone and iPad

Sync Mail, Calendar and Contacts with your iPhone

Windows Mobile

Sync Calendar and Contacts and get your Gmail.

Device not listed?

You may still be able to sync with Google. Find out more about sync options.

Connectivity – Computers on the Go

- Built In Example Dell Latitude E6410 has an add on internal mobile broadband card for Verizon, Sprint, or AT&T networks for an extra \$125.
- Cell phones can be used as an Internet provider for your laptop via USB connection or as a WiFi bubble for up to 5 users. Buy the right data plan!
- Check all the options before you re-up your cell phone contract.
- iPads are available with 3G connectivity at around \$25 month.
- New tablets from PC manufactures are available with 3G connectivity.



Apple Explosion









Technology Tools for Macs

MILO List Serve

http://preview.tinyurl.com/3x2vgca

Gmail Calendar Documents Reader Web more ▼





Macs In Law Offices (MILO)

Description: Forum for discussing issues related to using Macs in Law Offices

You must be signed in and a member of this group to view its content.

- Sign in to Google Groups
- Sign in and apply for membership or contact the owner.

Technology Tools For Macs



Technology Tools for iPhones

2010 60 iPhone Apps

http://www.iphonejd.com/iphone jd/2010/03/60-apps-in-60-minutes.html



iPhone J.D.

Lawyers using iPhones

2011 60 iPhone Apps

http://www.iphonejd.com/iphone_id/2011/04/60-apps-in-60-minutes-2011.html



Apple iPad 2

Motorola Xoom

HP webOS Tablet

Asus Eee Pad Transformer

Blackberry Playbook

Samsung Sliding PC 7

T-Mobile G-Slate

Acer Iconia

HTC Flyer

Notion Ink Adam





JOTT -Voice Recognition Services

http://www.jott.com





Virtual Transcription





Voice Recognition Software

- Technology has vastly improved
- Control your computer by voice
- Automate common tasks with voice "macros"
- Voice to text automation





Voice Recognition Software

 Dragon Naturally Speaking is marketplace leader <u>Versions</u>: Standard, Preferred, Professional, Legal, Medical





Voice Recognition Software

- Invest in a great quality headset
- If you don't like headsets try the:

Samson Go Mic

Great for dictation and recording

meetings



Digital Dictation – Analogue vs. Digital

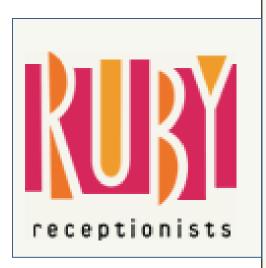


- Tracking down jobs
- Reallocating jobs
- Manual allocation of tapes and files
- High cost of tapes & units
- Inability to back up



- Prioritize jobs
- IAF (Intelligent Audio File) compatible
- Insert "after thoughts"
- Route files directly
- Edit before sending
- Dictating choices
- Your location irrelevant

Virtual Receptionist



http://www.callruby.com





Virtual Assistant





Get Paid!

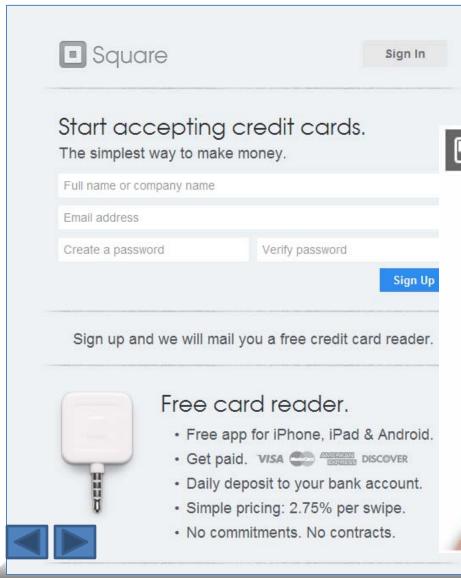
Accept credit card payment Bill using e-mail











Accept credit card payments on your cell phone



Use Online Fax Services



FaxCompare

http://www.faxcompare.com

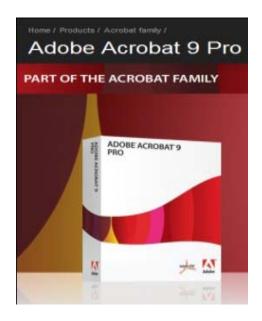
DON'T miss a court date because

- The e-mail notification was trapped by your Spam filter
 - Whitelist the domain of the court!
 - Go here for Outlook instructions
 - http://email.about.com/od/outlooktips /qt/et110505.htm





Adobe Acrobat 9 (10) http://www.adobe.com



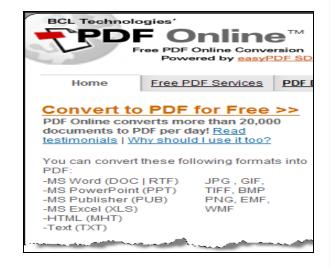
Nuance PDF Converter 6

http://tinyurl.com/yhy4qut



PDF Online

http://www.pdfonline.com





Eliminate Metadata





Technology Tools External Hard Drives



- ioSafe External Hard Drive
- www.iosafe.com
- 1 TB \$239, 2 TB 400



The sarest, most advanced trieproof waterproof external hard drive in the world, the loSafe Solo delivers unmatched data protection for your digital life – your memories, media, and documents – at a price anyone can afford.





- UltraMax Plus Hard Drive
- http://go.iomega.com/
- 2TB \$270, 4TB \$450
- Includes Software





Technology Tools Remote Back-Up





Secure

✓ Affordable

http://mozy.com/pro
Server farm backup



http://www.corevault.com
Server farm backup



http://www.crashplan.com
Also provides back up to
other computers



Technology Tools Back-up Software

Second Copy

http://www.centered.com/

\$30 per license



Roxio Retrospect

http://www.retrospect.com/

\$120 for two licenses





Technology Tools Image Your Computer

Imaging your computer provides restore capabilities of all the systems, software and files on your machine in one operation.



Disk Imaging Software Review

Immortalize Your Hard Drive

Disk imaging software takes a picture of your hard drive that you can use for any disaster that might come your computer's way. You won't have to worry about losing your files if you have disk imaging software.

Read software reviews here:

http://disk-imaging-softwarereview.toptenreviews.com/



Technology Tools On-Line File Sync Services



Online data synchronization service provides you the updated information whenever you need it, regardless of your location.

http://www.dropbox.com



http://www.sugarsync.com



http://tinyurl.com/4qebrqs

http://tinyurl.com/6gpwxcd

Review: SugarSync for the iPad:

http://tinyurl.com/6h6zklg



http://www.wuala.com/
You hold encryption key



http://www.spideroak.com/ All in one – you hold encryption key



VUPoint Magic Wand Scanner

http://www.vupointsolutions.com

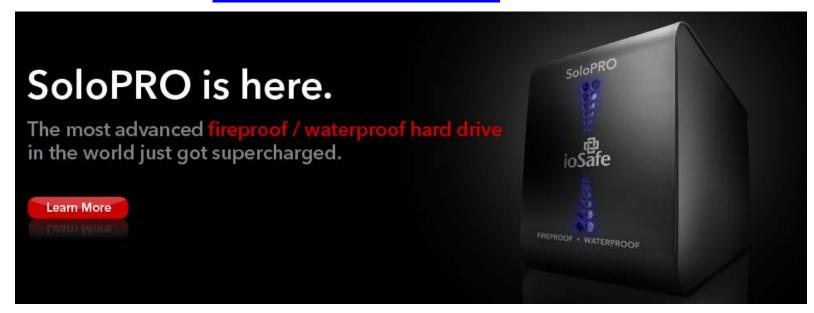






ioSafe External Hard Drive

www.iosafe.com





- Iron Key
- https://www.ironkey.com/

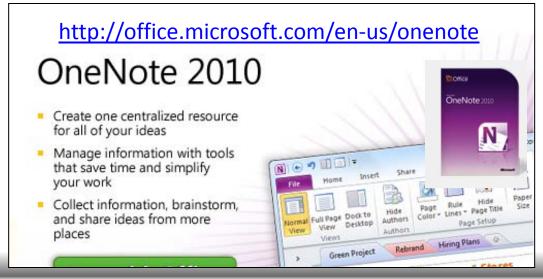




Organize your knowledge base using:







Pulse Pen by Livescribe

http://www.livescribe.com/

- Records the sound
- Captures your notes
- Coordinates sound with your notes
- Upload to computer
- Use third party software to OCR
- 1GB memory will capture 9 hours
- Requires special paper to record notes
 - May purchase or create your own
- Read RI-309 before using



Keyboard Scanner

http://keyscan.com





Review

- Implement a redundant back up system
- Encrypt your laptop
- Secure mobile devices
- Use an encrypted flash drive
- Protect your passwords
- Understand metadata
- Make smart technology decisions
- Contact the PMRC for assistance



Success Will Require

- Working
 - More quickly
 - More cheaply
 - More efficiently

AND

- To a higher quality
 - Using different methods of working



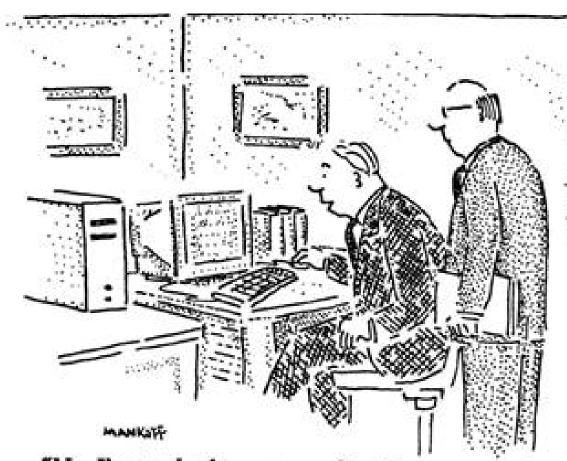
Join ABA SoloSez

http://www.abanet.org/soloseznet/index.html





Backup!



"No, I'm not backing up our files-I'm just assuming that the F.B.I. is making copies."



SBM STATE BAR OF MICHIGAN

When you have questions -

Contact the PMRC:

800-341-9715

pmrcHelpline@mail.michbar.org

Contact Diane Ebersole:

Practice Management Advisor

517-346-6411

debersole@mail.michbar.org

