Equipping the Law Office 2012

By Jim Calloway

Long past is the day when equipping the law office meant buying some furniture, file cabinets and typewriters. The modern law office requires a lot of technology equipment. Information technology (IT) equipment is a significant investment, although prices for computers and hard drives have dropped over the last several years. The challenge now is that there is a huge variety of different types of equipment and it seems much harder to make informed decisions.

This article is intended to give an overview of the different types of equipment that might be purchased in the law office today. While some products will be mentioned, it is not intended to cover all products. Generally the focus here will be on a firm of one to 10 lawyers.

First of all, the foundation of the lawyer's technology system is the computers, the server(s) and the computer network. Today everyone needs a workstation, including the errand runner. Some smaller operations use a peer-to-peer network instead of a server-based network. Others use a slightly more powerful desktop as a server, but this will probably result in some frequent slowness during peak use times. A true server setup is preferred, but it is probably true that a lawyer who is not a technology hobbyist would have a difficult time managing a server-based network without some technical support. From both efficiency and risk management standpoints, it is a better plan to have an IT support person for almost any size of law firm. For smaller firms, this will obviously be an outside vendor.

The big advantage to having all data on a server is that the law office operations can be protected by daily backup of the server rather than backing up each individual workstation, although the workstations should still be backed up periodically.

DESKTOP VS. LAPTOP PC

With workstations, the initial question that must be determined is whether the attorneys in the office will use desktop or laptop computers. This author is generally in favor of laptop computers for the following reasons:

1) Having the same workstation at home and at work can be a huge benefit for the lawyer who sometimes works at home.

2) Even for those who only rarely work outside of the office or only might use the laptop in an emergency situation (no power in the office), it is still a great benefit on those rare occasions to easily be able to continue work.

3) While it is true that one pays slightly more for slightly less power when buying a laptop versus a desktop computer, the difference is not very significant at this point.

4) With a port replicator (aka docking station), a full-size keyboard and an external monitor,

the difference in the experience between working with laptops and desktop computers at the lawyer's desk is negligible.

It is my conclusion that many, if not most, lawyers should have laptop computers, and it should be decided on a case to case basis for the rest of the staff. The reception area is one area where it makes sense to have a desktop computer. (Note: For larger firms this may differ. They may have several laptops available to be checked out by lawyers as needed.)

For a new desktop PC, four gigabytes or more of RAM is perhaps the minimum for a new machine. More is better. While processor speed is not that important for most legal operations, it is suggested that anywhere in the 2.4 to 3.2 gigahertz range is adequate.

A monitor is required. In fact, this writer would argue that two monitors are required for productivity purposes. Monitors are much cheaper now and large monitors from 22-25 inch LCD flat panel are a good plan for most lawyers. You will spend a lot of time looking at that monitor, so do not scrimp on its quality.

Which operating system appears to be an easier question at this point in time. While many lawyers have doggedly stuck with Windows XP because it "just worked," there are also missing many benefits that are contained in Windows 7.

Based on my reading of the initial reviews of Windows 8, there is a fair divergence of opinion. Most dislike the new "metro" interface, but others say that can be easily bypassed. For most lawyers, now is a great time to buy a new computer with Windows 7 preinstalled and gain the benefits of Windows 7. There are many Windows 7 features that I use daily, like the improved desktop search function and the snipping tool to easily capture onscreen images. I question whether Windows 8 will quickly gain acceptance as it is a fairly radical design change in several ways. For entertaining reading, sample "Windows 8 review: Yes, it's that bad" from InfoWorld at www.okbar.org/s/infoworld.

Windows vs. Macs

At this point, the vast majority of lawyers still use Windows-based PCs. If you are a lawyer who loves to use Macs, you do not need my approval to continue to do so. The number of Mac computers in law offices continues to increase slightly but steadily, and the number of Macs on college and law school campuses does not indicate that will slow. There are a lot of benefits to using Macs. However, for the lawyer of power user skills who uses a PC, there will be a significant learning curve when switching to Mac computers. And the cost will be more because most lawyers will find they have to also install a copy of Windows on their machine. For the lawyer who is not a power PC user, the Mac may seem to be easier to learn and more intuitive. I now know many lawyers who operate their practices with Macs and they certainly swear by them.

For more information on Apple computers in the law office, see the *Macs in Law* blog at www.macsinlaw.com, the Macs In Law Offices (MILO) forum at http://groups.google.com/group/milogroup/ and *The MacLawyer* at www.themaclawyer.com/. See also the blog post "8 Great Sites for Mac Loving Lawyers" at www.legalproductivity.com/get-productive/8-great-sites-for-mac-loving-lawyers.

For a notebook computer, four gigabytes of RAM is also indicated. More will make for a faster machine.

The screen size of a laptop is clearly a personal preference. Many people enjoy working on a smaller screen so that it can easily rest in their lap on airplanes, and they also like the lighter weight of smaller notebooks. Others (like me) are willing to put up with the extra weight of a large screen laptop to see larger images and more viewable area. A laptop is one area where one should not buy a generic machine and should rely on name-brand vendors like Lenovo, ThinkPad, Dell, HP or Toshiba. Because of the expense for repairs and replacement parts for a notebook computer, it is suggested that one at least take a look at the available extended warranty contracts. Those agreements where the company agrees to service your computer at your location as opposed to shipping it in for repairs are obviously more convenient.

THE 'PAPERLESS OFFICE'

We know you understand that technology within the law office carries with it the potential to use less paper. But, as a practical matter, this technology can result in more paper being used.

The "paperless office" or digital law practice is a necessity for today's lawyer not as much for environment concerns, but for efficiency. It

means no more lost files and quick reference to client files without leaving your desk. You also cannot back up paper files offsite as a practical matter. Backing up your digital files is a great protection for you and your client.

So in today's law office operations, a digital scanner is a requirement. Scanning is used to convert paper that comes into the office or is created, like handwritten notes to a digital document that can be stored in the client's digital file.

In large law firms, the IT professionals will often push for the large centralized scanner-copier-printer combination units. These are easy for the IT department to manage. My position is that this is not efficient in the modern law office. Small desktop scanners located at each workstation allow one to scan, and therefore file documents quickly, without having to get up and go down the hall.

It is noted that if all workstation scanners are sheet-fed only, there is the need for one flatbed scanner somewhere in the law office to scan fragile or critically important original documents that one would not want to put through a sheet feeder.

In our office, we use the Fujitsu ScanSnap S1500. It is a very serviceable machine and includes Adobe Acrobat Standard software as part of the package, making it a real value. It is fast and very popular in the legal technologist community.

However, the ScanSnap is not a TWAIN compliant scanner, which means essentially that the computer cannot run the scanner. From my own personal point of view, I have found no problem with having to reach over to push the blue button to start a scanning operation, but if you are interested in a TWAIN compliant scanner, my colleague Nerino Petro recently reviewed the Epson Workforce Pro GT/550 in the May/June 2012 Law Practice magazine. Here is a link to the review: http://tinyurl.com/77sl4a9. It has similar features to the ScanSnap, even though the Adobe Acrobat software is not included.

In addition to the scanner, of course the office needs other peripherals such as printers, surge protectors and a backup solution. It is suggested that uninterruptable power supplies/surge protectors be used for all of the computers in the office, as well as other expensive pieces of hardware.

Printer models change fairly rapidly and so it is best to look for printer information online when you are ready to purchase one, even if you intend to buy it in a local store. Ink jet printers are discouraged due to the high cost of supplies. Multi-function devices are great space-savers for a home office, but generally a law office is best equipped with individual printers and scanners as noted above. A pricier, high-end multifunction machine is still useful, particularly in the larger firms. Many law firms will find that when they buy a large copier to meet their needs, the other capabilities will be included.

Fax machines will quietly become extinct, but faxing will continue. More on that later.

BACKUP, BACKUP, BACKUP

The most important business continuity protection that a law firm can implement is to provide for appropriate backup systems. Today a law firm with a major data loss can have significant problems. The loss of thousands of dollars is the best case scenario. Therefore, a law firm would want to have two duplicate systems of backup even though the primary backup is believed to be bulletproof. This is best accomplished by using an automated online backup provider that is configured to make daily backups of the files that are changed *and* a hard drive that is used to make secondary backups. Some have files copied to a secure computer at a partner's house. Others buy portable hard drives that can be plugged into the computer's USB port for an additional backup. At least two of these portable hard drives are required as they should be rotated so that at least one is always stored off-site.

If you train your staff and lawyers to only store files on the server and not the workstation, then one can also use specialized software to copy a mirror image of the hard drive after it is configured exactly as wanted. This way, if there are ever any problems with a PC, the mirror image can be restored and the computer reset to its original functioning capability. Mirror restoration is not as exact as one might hope, so it is also a good idea to have a master list of what is done to set up a typical workstation.

Since portable hard drives are relatively inexpensive, some will just copy over files and folders to the portable drive. A backup software package will compress the data, allowing one to retain more versions of the backup. There are good backup solutions included in Windows XP, Vista and Windows 7. If you prefer a third-

party solution, there are many with names like Handy Backup, Second Copy, Acronis True Image Backup and BounceBack Ultimate Backup Software.

The OBA has endorsed Core-Vault as a full service online backup provider. You can find out more information at www. corevault.com/oba. There are several online backup providers, but CoreVault is an Oklahoma-based company with a long history in our state and a long history of backing up data.

SOFTWARE CONSIDERATIONS

One can save a significant amount of money by buying OEM software when the computer is originally purchased. OEM stands for Original Equipment Manufacturer and is licensed only to work with the particular machine purchased. That is a slight drawback as a fully licensed purchased non-OEM version of software can be used legally on any computer and most packages allow that it can be used on two computers as long as the same operator uses both computers 80 percent of the time.

Nevertheless, when purchasing a computer one should be aware of the retail prices for the software that is needed and check the bundled prices. Microsoft Office suite will almost always have a significant reduction if bought as an OEM package, as often will Adobe Acrobat Pro and WordPerfect. (Please allow me to repeat that the opportunity to get a copy of Adobe Acrobat with a Fujitsu ScanSnap scanner is an extremely good value.) One place to get WordPerfect Office fairly cheap and legally is www.corel.com/barassociation. Often the newest version of the software is not available there until several months after its release. The current version of Microsoft Office for Windows is 2010 and the current version of WordPerfect Office is X6.

Whether to use Microsoft Office suite or the WordPerfect Office suite is a subject of much debate within the legal community. But we are aware that most other types of businesses have gone to Microsoft Office exclusively.

While I appreciate that many lawyers swear by WordPerfect, there are more and more add-on packages and utilities that only work with Word and will not work with WordPerfect. Two examples include two Microsoft Word plug-in

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document assembly tools profiled in "Document Assembly for Lawyers," 83 *Oklahoma Bar Journal* 941 (April 4, 2012), that only work with Microsoft Word. iPad users have to be content at this point with a WordPerfect viewer app as no editor is available.

The document assembly article noted above prompted a telephone call from an attorney complaining about promoting Word when in his opinion WordPerfect is better and not from the "evil" Microsoft. In my opinion, today it is not that one is better than the other, but it is that the user has learned to use one more powerfully. Word and WordPerfect features function quite differently when you get beyond the basics. WordPerfect formats documents based on hidden codes within the lines of text, while Microsoft uses styles. If you do not understand using Word styles, you need some more Word training. There is a significant retraining time and expense to migrate between either of the word processors. You may still always pine for your first love.

PDF MANIPULATION SOFTWARE

There are more digital documents in our future. For the present time, "digital documents" means PDF documents. Word processing documents are for writing and editing. Once you have a finished document, then "PDF it" for filing or transmission.

Electronic document filing is becoming more and more common. Most lawyers deal with PDF documents almost every day at the present time. It is hard to imagine that a law firm can be without some PDF manipulation software.

Obviously the go-to standard is Adobe Acrobat X Professional found at www.adobe.com/products/acrobat.html. Adobe Acrobat Standard is somewhat less expensive than Professional, but Pro includes features lawyers use like redaction, creating PDF portfolios and comparing differences between two PDF files. Adobe Acrobat has many functions including the very important function of optical character recognition (OCR). New with Acrobat X is the ability to export PDF documents to Microsoft Word and Excel for editing. There are other packages that are less expensive including Nuance PDF Converter Pro 7 and Nitro Pro PDF. Unless the office already has a separate OCR program (which can be pricey), a lawyer would likely not want to

purchase any less expensive PDF manipulation program that did not have an OCR feature included.

A standard fax machine still works well today, but they will not be around for long. We are seeing a significant move to electronic faxing services. Internet faxing options like MyFax (www.myfax.com) or eFax (www.efax.com) are proving quite popular. Faxes are received as PDFs attached to an email. These are quite easy to file in the digital client file. To fax out, documents are scanned and sent via email or a website to the receiving fax station. A less expensive alternative with fewer features is Send2Fax (www.send2fax.com).

In the old days, the phone numbers available to be associated with an electronic faxing service might have generated long-distance charges. But now you can contract for a toll-free number. If a firm quits paying for a fax business phone line, it already may be saving money on a monthly basis, before considering the cost of the fax machine and supplies. But even if it is decided to keep the phone line for voice calls, the convenience and time saving should make it well worth the change.

TOOLS FOR SUCCESS

Practice Management Software remains very important. This will put together all of the various items associated with a particular file including billing records, documents, notes and calendar contacts. This is a critical element of running a 21st century law office because the PMS provides the list of open matter files. From that list one can open the individual files and find everything, including notes, documents, calendar entries, billing records and more. The American Bar Association Legal Technology Resource Center hosts an online chart comparing features of these products www.okbar.org/s/casemgmt.

Desktop Search Software. Because we are fallible human beings and will make mistakes, it is important to have some sort of desktop search software. This can be used to find electronic documents that have been misfiled. It can also be used to search for previously-created documents. Thankfully, Windows 7 includes outstanding desktop search application as a part of the operating service and the Macintosh computers have had desktop search included for a long time. If you don't have a Windows 7 computer or just would rather have the additional power of a third-party program, your attention is directed to Copernic desktop search at www.copernic.com or X1 desktop search at www.x1.com. Both of these third-party applications have many tools and filters.

Smartphone. You may just want a mobile phone to make phone calls, but efficiency requires the ability to check your calendar and email to make good use of otherwise wasted time. *iPhone J.D.* www.iphonejd.com is a "must visit" site for lawyers to learn more about apps and ways to use their iPhones and iPads more effectively. It is packed with product reviews. *The Droid Lawyer* http://the droid-lawyer.com is the go-to place online for lawyers who want to learn more about their Droid phones and tablets.

Document Management Systems (DMS) are systems that take care of storing and organizing all digital documents. These are really the ultimate filing systems. Some document management systems can be configured so that no document can be saved or scanned without filling out the DMS form that allows for better retrieval. This is called forced user compliance. Most DMS have full text indexing and retrieval. Another important function of DMS is versioning that creates discreet copies of versions of a document. This can be very handy in the event of an emergency. DMS also provide document security and often are set up for remote access.

Furniture. It is not my place to second guess or micromanage your office decorating choices. But I do have a few observations. The fundamental question your décor should address is "Does this look like a place where I can entrust the most important thing in my life?" Most legal matters feel like they are that important at the time and many are.

A lawyer opening a law office on a budget should definitely look at used furniture and business closing auctions. There are some fine opportunities there. Your intended clientele may have some impact as well. A consumer bankruptcy lawyer wouldn't want their office to look so expensive as to make potential clients question whether they can afford you. A family lawyer might not want to appear to be overly formal and unapproachable. A white collar criminal defense practice or corporate attorney would not want to have a thrift store aura about the office.

Be cautious about waiting room furniture that is low or could be difficult to get up from. We all want our law offices to be accessible. Make cer-

tain the waiting room furniture will be appropriate for the elderly or disabled.

Document Shredder. You will need at least one document shredder in the law office. You may decide to have one at every workstation. Do not buy the cheapest paper shredder. You want it rated to handle at least five or six sheets of paper at a time. Cross cut shredders provide greater security and the finer chopping means more paper goes into a container so you can empty it less frequently and the trash bags hold more. The very cheapest shredders are nothing more than a light plastic trash can with the shredder attachment on top. They are often unstable and easy to tip over, plus they are often messy to empty. A shredder that empties with a slide out compartment rather than taking the shredder off the top is desirable as are those that will accept plastic cards, envelopes and staples.

Filing Cabinets. Even in a state of the art digital law practice, you will still need some filing cabinets. You also may want to consider one lockable filing cabinet or safe that is fire and water resistant. You should try to avoid it, but at some point someone will drop off something very valuable that you have to keep overnight when there is not time to get to your bank safety deposit box.

CONCLUSION

Equipping the modern law office is different than it would have been many years ago. Hopefully this will give the reader a good start on setting up or reorganizing the law office.

ABOUT THE AUTHOR

Jim Calloway is the director of the OBA Management Assistance Program and manages the OBA Solo & Small Firm Conference. He served as the chair of the 2005 ABA TECHSHOW board. His Law Practice Tips blog and Digital Edge podcast cover technology and management issues. He speaks frequently on law office management, legal technology, ethics and business operations.