Top Technology Tools to Streamline Your Law Practice

April 13, 2016

12:00 p.m. to 1:30 p.m.

Portland City Grill
Jefferson & Adams Rooms
111 SW 5th Ave. 30th Floor
Portland, OR 97204

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OSB Professional Liability Fund

MCLE FORM 1: Recordkeeping Form *(Do Not Return This Form to the Bar)*

Instructions:

Pursuant to MCLE Rule 7.2, every active member shall maintain records of participation in **accredited** CLE activities. You may wish to use this form to record your CLE activities, attaching it to a copy of the program brochure or other information regarding the CLE activity.

Do not return this form to the Oregon State Bar. This is to be retained in your own MCLE file.

Name:	Bar Number:

Sponsor of CLE Activity:

Title of CLE Activity:	Program Number:

Date:	Location:

❑ *Activity has been accredited by the Oregon State Bar for the following credit:*	❑ **Full Credit.** *I attended the entire program and the total of authorized credits are:*	❑ **Partial Credit.** *I attended _____ hours of the program and am entitled to the following credits*:*
_____ **General**	_____ **General**	_____ **General**
_____ **Prof Resp-Ethics**	_____ **Prof Resp-Ethics**	_____ **Prof Resp-Ethics**
_____ **Access to Justice**	_____ **Access to Justice**	_____ **Access to Justice**
_____ **Child Abuse Rep.**	_____ **Child Abuse Rep.**	_____ **Child Abuse Rep.**
_____ E**lder Abuse Rep.**	_____ E**lder Abuse Rep.**	_____ E**lder Abuse Rep.**
_____ **Practical Skills**	_____ **Practical Skills**	_____ **Practical Skills**
_____ **Pers. Management Assistance**	_____ **Pers. Management Assistance**	_____ **Pers. Management Assistance**

*Credit Calculation:

One (1) MCLE credit may be claimed for each sixty (60) minutes of actual participation. Do not include registration, introductions, business meetings and programs less than 30 minutes. MCLE credits may not be claimed for any activity that has not been accredited by the MCLE Administrator. If the program has not been accredited by the MCLE Administrator, you must submit a Group CLE Activity Accreditation application (See MCLE Form 2.)

Caveat:

If the actual program length is less than the credit hours approved, Bar members are responsible for making the appropriate adjustments in their compliance reports. Adjustments must also be made for late arrival, early departure or other periods of absence or non-participation.

IMPORTANT NOTICES

Faculty

Nicole Black

Nicole Black is a Rochester, New York attorney and the Legal Technology Evangelist at MyCase.com, a law practice management software company. She is the nationally-recognized author of "Cloud Computing for Lawyers" (2012) and co-authors "Social Media: The Next Frontier" (2010), both published by the American Bar Association. She also co-authors "Criminal Law in New York," a Thomson West treatise. She writes a weekly column for The Daily Record, has authored hundreds of articles for other publications, and regularly speaks at conferences regarding the intersection of law, mobile computing, and Internet-based technology.

Agenda

11:45-12:00   Program check-in

12:00   Program begins

12:00-12:15   Innovative tools to help lawyers streamline their law practices
Cloud technologies and mobile apps to improve efficiency

12:15-12:30   Ethical and practical considerations of cloud storage and
online collaboration

12:30-12:40   Client communication in the 21st century

12:40-12:50   Operating a paperless law practice – scanning and essential apps

12:50-1:00   Time tracking and billing tools

1:00-1:30   Open session and Demonstration of MyCase (no MCLE credit)

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Top Technology Tools to Streamline Your Law Practice

Your Law Practice

Niki Black | Legal Technology Evangelist, MyCase.com

Author | Cloud Computing for Lawyers (ABA 2012)

1995

CLIFFORD STOLL

Mocking futurists | The Internet: Bah!

"(VISIONARIES SAY) COMMERCE AND BUSINESS WILL SHIFT FROM OFFICES AND MALLS TO NETWORKS AND MODEMS – BALONEY. . . (THEY) PREDICT THAT WE'LL SOON BUY BOOKS AND NEWSPAPERS STRAIGHT OVER THE INTERNET. UH, SURE. . .DO OUR COMPUTER PUNDITS LACK ALL COMMON SENSE? THE TRUTH IS NO ONLINE DATABASE WILL REPLACE YOUR DAILY NEWSPAPER. "

ME

Total Geek

TECHNOLOGY TIMELINE

2005

2006

AMAZON EC2
released in private beta

2007

IPHONE
first released

2008

APP STORE
launched

2010

IPAD
first released

2015

APPLE WATCH
first released

HOW DID WE GET HERE?

1.

2.

3.
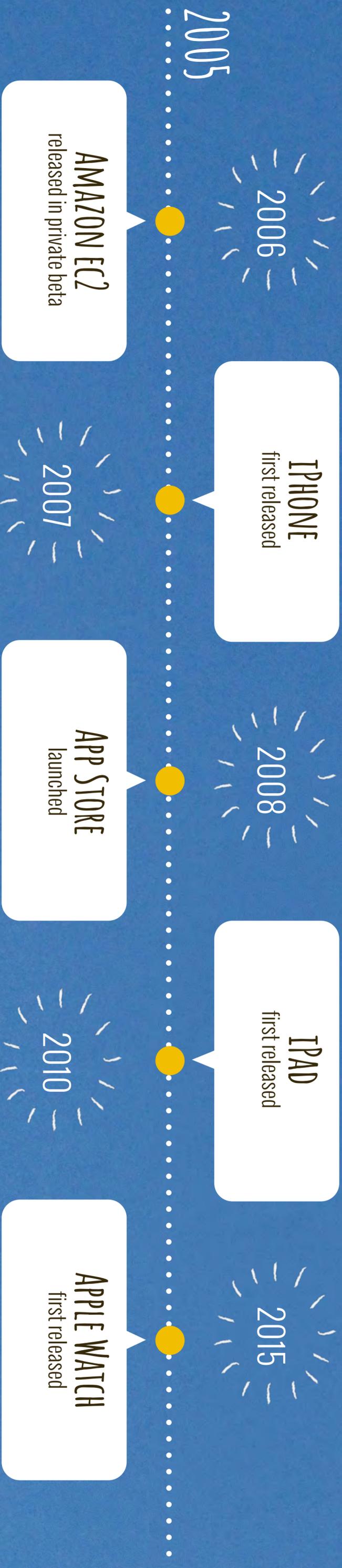
CONFLUENCE OF EVENTS

1. Improved processing power
2. Cloud computing
3. Mobile computing

"Mobile devices are constrained by their memory, processing power, and battery life. But combined with cloud computing, data processing and storage can happen outside of mobile devices."

*IEEE Computer Society 2014 Tech Trends Report

LAWYERS GOING MOBILE

40%

79%

40%
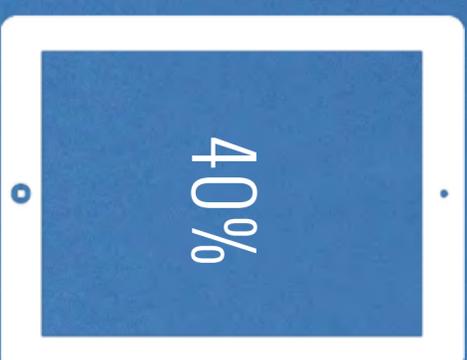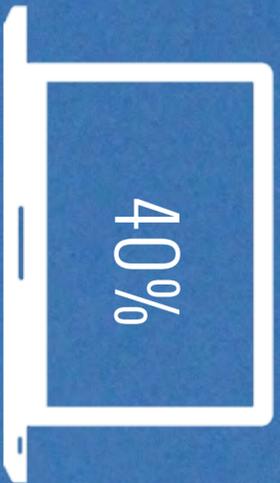
* 2015 ABA LEGAL TECHNOLOGY SURVEYS

Billing time

BILLING ON THE GO

LEGAL APPS / WEB-BASED

STAND ALONE OR LPM INTEGRATION
....
Time59 or LPM apps

LEGAL APPS / SERVER-BASED

SERVER-BASED BILLING INTEGRATION
....
iTimekeep

NON-LEGAL APPS

STAND ALONE
....
Timewerks Pro, Timemaster
+Billing, Bill4Time,

Collaboration Tools

GOOGLE DOCS

SLACK

FREE

TRELLO

WEB-BASED TOOLS

DROPBOX

PAID

LPM SYSTEMS

BOX.NET

GLASSCUBES

LEGAL V. NON-LEGAL
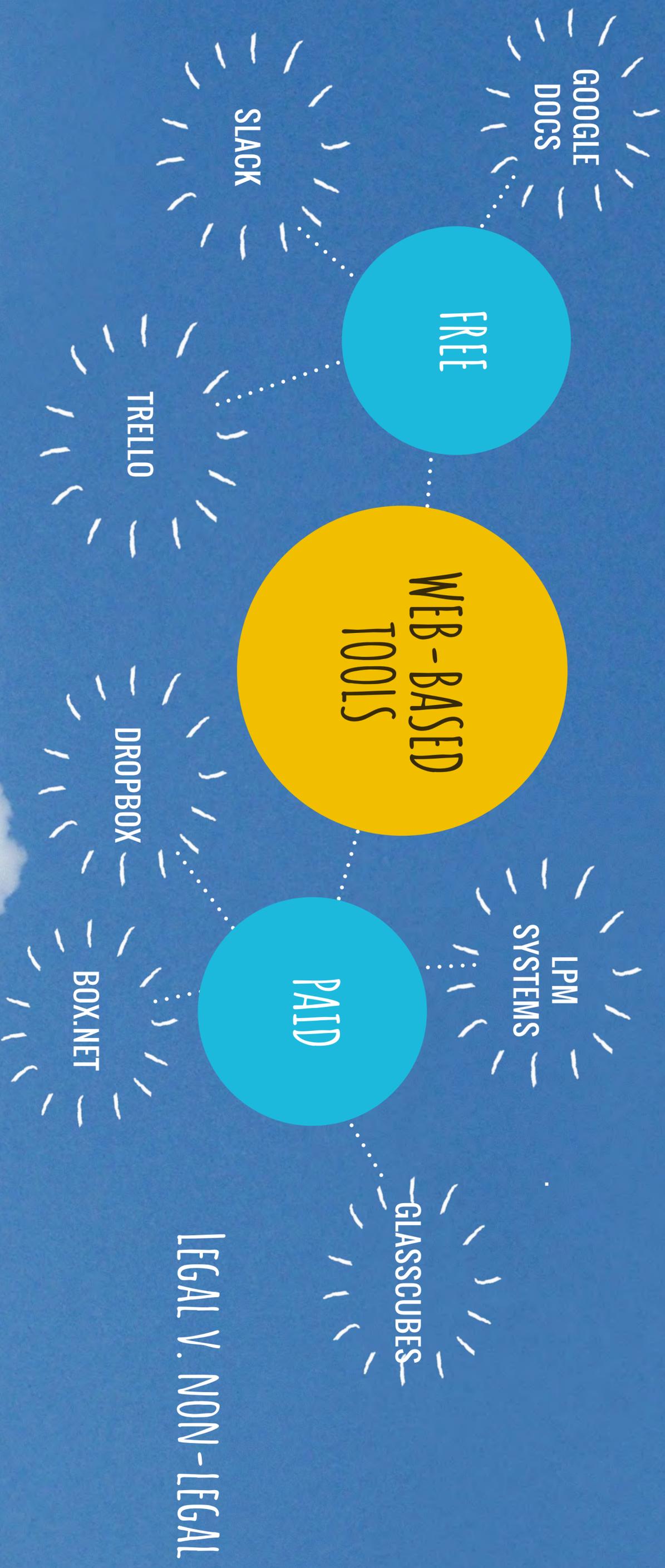
Secure communication

SECURE COMMUNICATION

EMAIL

ENCRYPTED EMAIL

SECURE
ONLINE
PORTALS
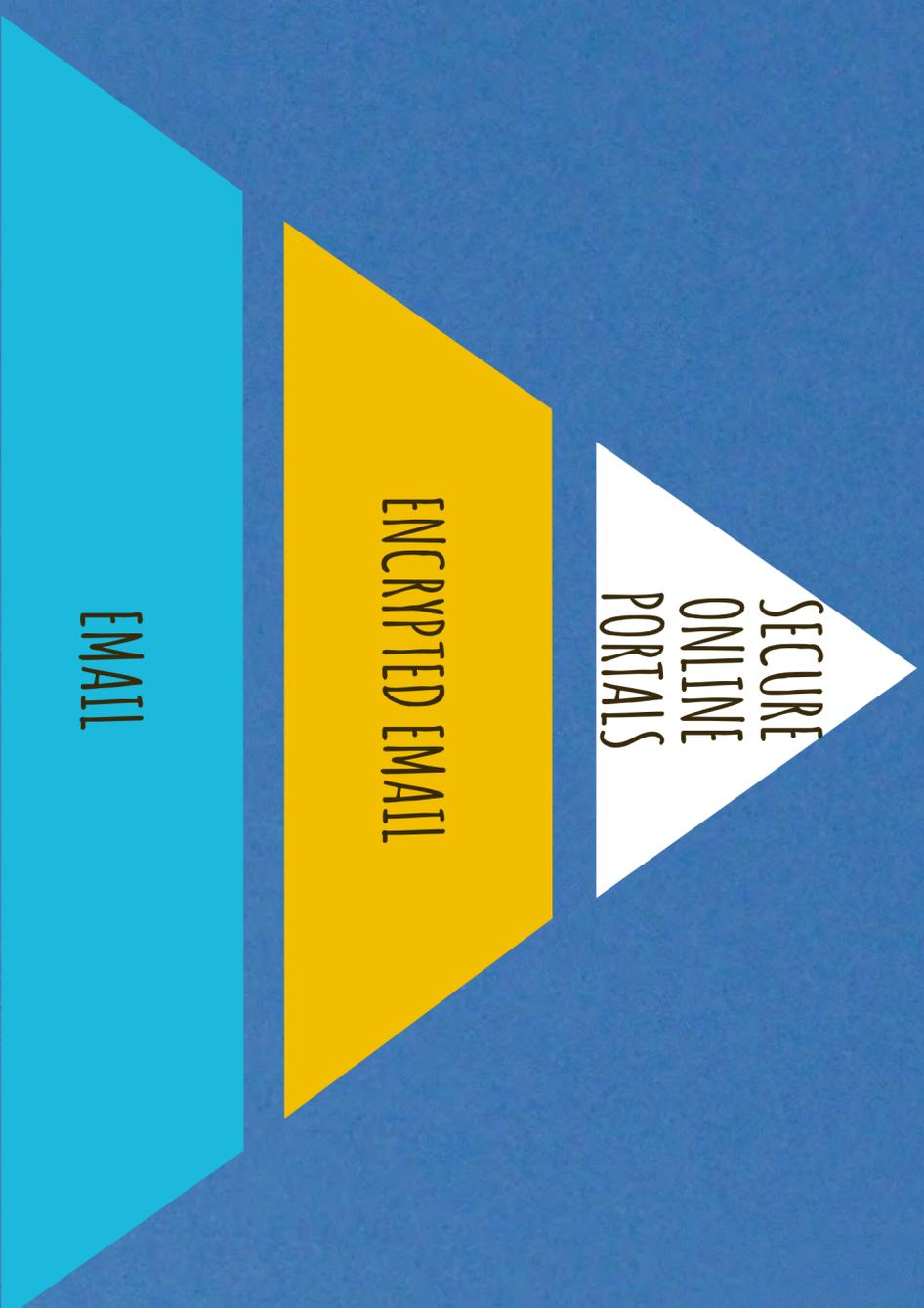
MOST SECURE
encrypted, protected, confined to platform

MORE SECURE
forwarded emails lose encryption

UNSECURE
like a postcard written in pencil

	Yes/No	Standard	Requirements
NORTH CAROLINA 2011 Formal Ethics Opinion 6	Yes	Reasonable Care	• Review terms and policies, and if necessary re-negotiate, to ensure they're consistent with ethical obligations. • Evaluate vendor's security measures and backup strategy. • Ensure data can be retrieved if vendor shuts down or lawyer wishes to cancel service.
OREGON Opinion 2011-188	Yes	Reasonable Care	• Ensure service agreement requires vendor to preserve confidentiality and security. • Require notice in the event that lawyer's data is accessed by a non-authorized party. • Ensure adequate backup. • Re-evaluate precautionary steps periodically in light of advances in technology.
PENNSYLVANIA Opinion 2011-200	Yes	Reasonable Care	• Exercise reasonable care to ensure materials stored in the cloud remain confidential. • Employ reasonable safeguards to protect data from breach, data loss, and other risk. • See full opinion for 15 point list of possible safeguards.
VERMONT Opinion 2010-6	Yes	Reasonable Care	• Take reasonable precautions to ensure client data is secure and accessible. • Consider whether certain types of data (e.g. wills) must be retained in original paper format. • Discuss appropriate types of cloud storage

* Source: http://tinyurl.com/abaCloud

ing Web Highlighter (v1.7)

Feedback

Security issues to consider:

1. Encryption
2. Geo-redundancy
3. Data back ups
4. Extraction of data
5. Transborder data flow
6. Financial security

For full list of questions see:

http://bit.ly/hyFBx0

Document storage

DOCUMENT STORAGE

LPM PLATFORMS

ENCRYPTED BY COMPANY

designed for lawyers

DROPBOX & BOX

ENCRYPTED BY COMPANY

non-legal

SPIDER OAK & BOXCRYPTOR

ENCRYPTED BY USER

non-legal & storage only

Document scanning

SCANNING TOOLS

SCANNING TOOLS

IOS APPS
- SCANNER PRO
- GENIUS SCAN
- TURBO SCAN

HARDWARE
- KODAK SCANMATE i940
- XEROX MOBILE
- SCANSNAP FUJITSU IX500
- NEAT SCANNER
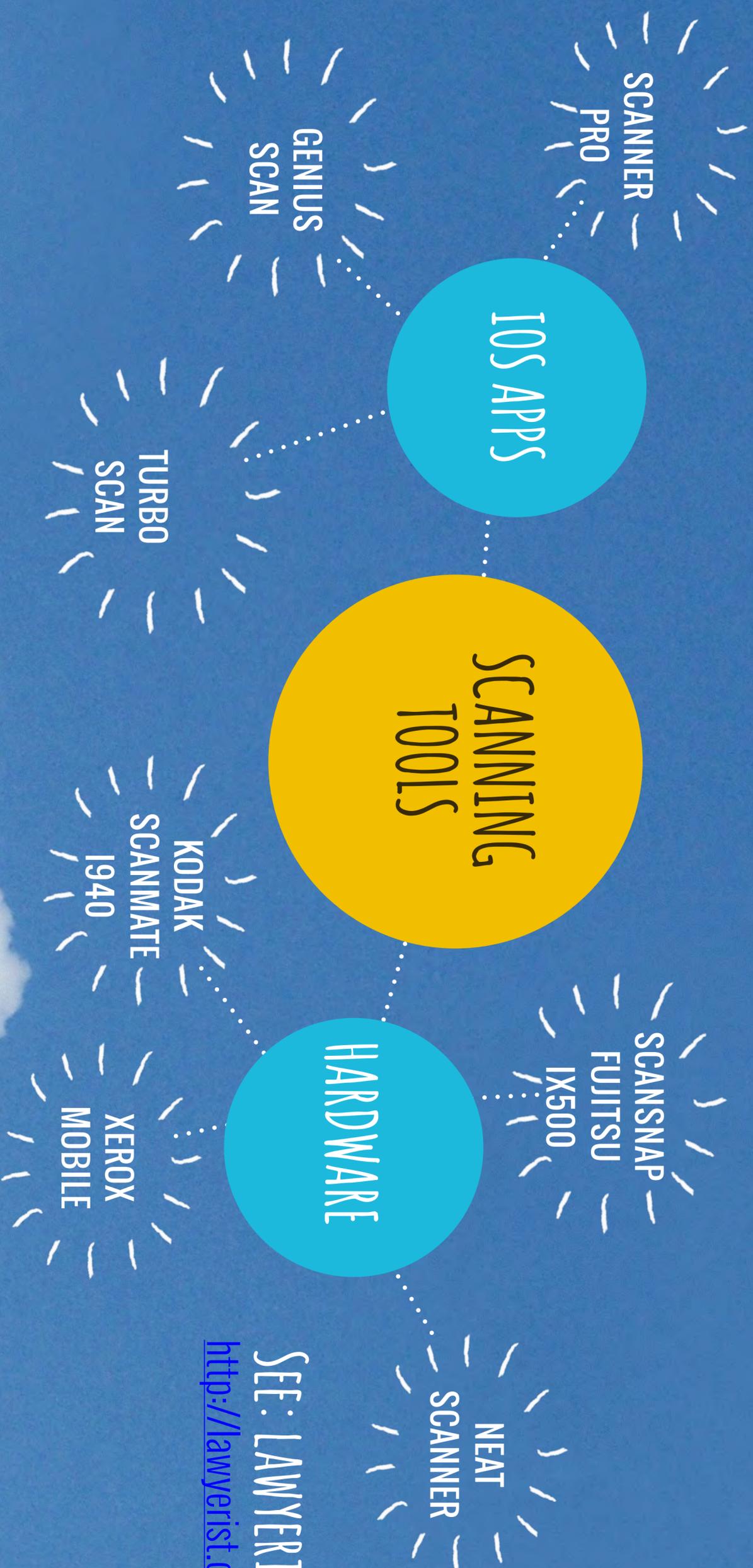
SEE: LAWYERIST BLOG
http://lawyerist.com/best-scanner/

PDF annotation

PDF VIEWING AND ANNOTATION

IOS APPS

PDF EXPERT
....
See also: Goodreader,
iAnnotate, ReaddleDocs

WEB-BASED SOFTWARE

GROUP DOCS
....
See also: PDFEscape,
A.Nnotate, PDFOnlineReader

DESKTOP SOFTWARE

ADOBE ACROBAT
....
See also: Foxit, Okular

Legal research

LEGAL RESEARCH

GOOGLE SCHOLAR & FASTCASE APP

FREE
but less flexibility

CASEMAKER, FASTCASE, LOISLAW, VERSUSLAW

FREE
with bar participation

CASEMAKER, FASTCASE, LOISLAW, VERSUSLAW

LOWER PRICE
prices and coverage vary

WESTLAW & LEXIS

MOST EXPENSIVE
plans vary

Litigation

DOCUMENT STORAGE

DEPOSITION

LexCity, TranscriptPad

JURY SELECTION

iJuror, iJury

TRIAL PRESENTATION

TrialPad, TrialDirector, TrialTouch

Wearable technology

Smartwatches

Google Glass

"The truth is usually just an excuse for a lack of imagination."

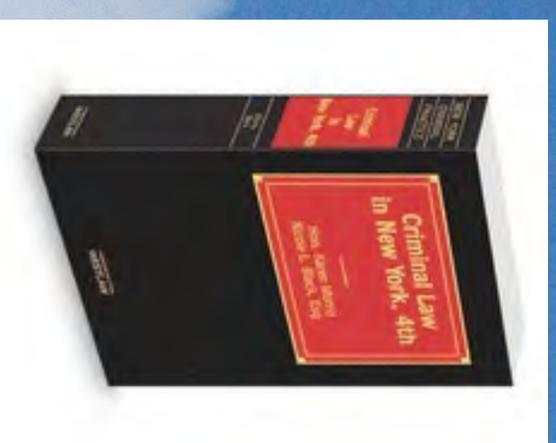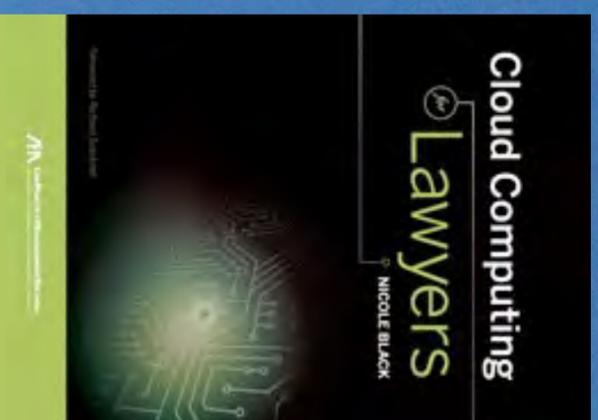- Garak, Star Trek: Deep Space Nine

THANKS FOR LISTENING!

LEGAL TECHNOLOGY EVANGELIST | MYCASE.COM | WEB-BASED LAW PRACTICE MANAGEMENT

NICOLE BLACK

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AUTHOR AND CO-AUTHOR OF:

THE DAILY RECORD

Legal LOOP

Litigation and trial iPad apps for lawyers

Although I've written about iPad apps for lawyers in the past, the number of apps designed specifically for attorneys is always increasing. For that reason, I figured it was high time to revisit this topic so that I could cover most of the legal apps available, including some of the more recent releases.

One of the most popular and rapidly growing categories of apps for lawyers are those developed for use in trial and litigation. Within this subset of apps, there are generally two different types: apps for use during trials and apps for use during the pretrial discovery phase. In this article, I'll highlight apps developed for use during trial and next week I'll discuss the pretrial apps.

First, there are the apps that assist with jury selection. At the most basic level, these apps allow you to keep track of jurors' responses and reactions during voir dire.

The least expensive of the bunch, at just $4.99, is the Jury Tracker app. This app was created by an attorney and is designed to aid lawyers during trial by providing an easy way to keep track of observations regarding jurors by organizing notes and predictions regarding each juror throughout the course of the trial.

Next up is iJury at $14.99, an app that facilities the analysis of juror responses. After inputting the jurors' voir dire responses into the app, you can score their responses as either negative or positive and then the app generates metrics about your prospective jury.

Not to be confused with iJury is the iJuror app. This app costs $19.99 and allows you to add jurors to a configurable seating chart. You then add information and notes about the jurors by tapping the juror's location on the seating chart. When jurors are dismissed from the panel, you simply drag them off of the seating chart.

Another voir dire app is the JuryStar iPad app, which was developed by an attorney and costs $29.99. This app has a number of built-in features designed to make it easy to assess your jury panel at a glance, including color codes for the gender of jurors and the ability to add a custom color code for another category of your choosing. It also allows you to create custom fields so that you can easily track the factors that are most important to your case.

Finally, JuryDuty is another app designed to assist with voir dire. This app costs $39.99 and allows you to enter unlimited data about each juror. Once you've entered notes about a juror, that juror's icon changes from white to blue, thus making it easy to determine which jurors you've already addressed.

By NICOLE BLACK

Daily Record Columnist

Now, on to the trial apps. First, there's the newly released TrialDirectory app, the only free app in the bunch. With this app you create case folders and then add exhibits via your Dropbox or iTunes accounts. You then work with your evidence using the annotation and presentation tools.

Next up is the Exhibit A trial presentation app, which, at only $9.99, is also a bargain. This app allows you to import your documents, photos, etc., via Dropbox, iTunes, WiFi, FTP or email. You then organize your files into "projects" and can highlight and mark your exhibits, which are shared with the jury using your iPad and an external monitor or by a projector using a VGA or HDMI adapter, or by connecting wirelessly using AirPlay and Apple TV.

Finally, there's the ever-popular TrialPad app, which costs $89.99. TrialPad was one of the first trial presentation apps to be released and has thus had time to fine tune and perfect its app based on user feedback. With TrialPad you import files into the app via a large number of interfaces, including Dropbox, WebDAV, email, iTunes, Photos app, or other iPad apps. You can highlight, annotate, redact and zoom in on your documents and compare documents side by side. There is also a whiteboard available so that you can draw freehand as you speak.

The wonderful thing about all of these apps is that they are both affordable and innovative. The jury selection apps streamline and simplify the process of voir dire while the trial apps level the playing field and offer all lawyers access to tools and features that were once only available to large firms with thousands of dollars available to spend on costly trial presentation software programs.

So, just as the iPad is revolutionizing the consumer content consumption experience, it is likewise improving the experiences of trial lawyers and jurors alike. Not bad for a device that many naysayers used to call an unnecessary and unimpressive oversized iPod. Not bad at all.

Nicole Black is VP at MyCaseInc.com, a cloud-based law practice management platform. She is also of counsel to Fiandach & Fiandach in Rochester and is a GigaOM Pro analyst. She is the author of the ABA book Cloud Computing for Lawyers, co-authors the ABA book Social Media for Lawyers: the Next Frontier, and co-authors Criminal Law in New York, a West-Thomson treatise. She speaks regularly at conferences regarding the intersection of law and technology. She publishes three legal blogs and can be reached at niki@mycaseinc.com.

THE DAILY RECORD

LegalLOOP

Mobile apps for the paperless law office

More than ever, lawyers are realizing the value and time-saving capabilities of mobile devices. The flexibility and convenience of practicing law on the go is especially apparent when lawyers take advantage of mobile apps created for creating, storing and organizing documents and notes. If you haven't yet discovered the many benefits of creating and accessing digital documents on your iPhone or iPad, why not get started today using some of the iOS apps discussed below?

First, your iOS device is perfect for taking notes no matter where you happen to be. Some of the most popular note-taking apps include Evernote (free), Notability ($2.99), and, my favorite, Springpad (free). All three of these apps offer a vast assortment of note-taking capabilities, including a variety of methods and integrations which allow you to access your notes on both your device and online. Springpad and Evernote also offer Web-based interfaces which make it easy to clip and store websites, images and more using any Web-enabled device.

For document creation, one of the best options is Apple's Pages app ($9.99), which offers full-featured word processing right on your iPad or iPhone. If you prefer Microsoft Word, then you can use the Office 365 app for iPhone (free, but not yet developed for the iPad), although that app requires that you have an Office 365 subscription and doesn't offer many of the popular features found in Word, such as the ability to track changes.

For a more full-fledged word processing app for Word documents, take a look at Office² HD ($7.99), an app that lets you view, edit and create Microsoft Word-compatible documents, Microsoft Excel-compatible workbooks and Microsoft Powerpoint-compatible presentations right on your iPad.

Next up, apps that facilitate the storage and annotation of PDF documents. There is a lot of competition in this space and as a result, there are a number of PDF apps that are popular amongst lawyers.

First, there's Goodreader ($4.99). For many lawyers, this is the app of choice for reading and storing PDF documents. although I find the interface to be a bit clunky. My preferred

By NICOLE BLACK

Daily Record Columnist

PDF annotation app of choice is PDF Expert ($9.99), because it has the cleanest and most intuitive interface. Like Goodreader, it reads most documents types and and once you've imported documents, you can create folders, name your files and store them away.

It also has fantastic annotation features, making it incredibly easy to fill in forms by adding typewritten or handwritten text into documents. You can also mark up documents by highlighting text or striking through words and easily input text into blanks found in documents. Other popular options to consider include iAnnotate ($9.99) and ReaddleDocs (free).

Finally, another way that you can use your the iPhone and iPad to manage documents on the go is by using a scanner app. There are a number of document scanner apps available either for free or at very reasonable prices of less than $10. These apps make it easy to scan a document using your device's camera function. You simply take a picture of the document and then send it to the recipient via email. Many also give you the option of printing the document or uploading it to a cloud-based document storage website such as Dropbox, Evernote or Google Docs. My scanner app of choice is Scanner Pro ($2.99). Other alternatives include GeniusScan (free) or TurboScan ($1.99).

So there you have it: an assortment of apps that make it easier than ever to create and manage documents on the go. So download a few of them today and give them a test drive. You might be surprised at how easy it is to to stay on top of your busy law practice no matter where you happen to be.

Nicole Black is a director at MyCase.com, a cloud-based law practice management platform. She is also of counsel to Fiandach & Fiandach in Rochester and is a GigaOM Pro analyst. She is the author of the ABA book "Cloud Computing for Lawyers," coauthors the ABA book "Social Media for Lawyers: the Next Frontier," and co-authors "Criminal Law in New York," a West-Thomson treatise. She speaks regularly at conferences regarding the intersection of law and technology. She publishes three legal blogs and can be reached at niki@mycase.com.

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WESTERN NEW YORK'S SOURCE FOR LAW, REAL ESTATE, FINANCE AND GENERAL INTELLIGENCE SINCE 1908

Legal LOOP

6 must-have apps for every lawyer's new iPad

You received exactly what you'd asked for this holiday season and now you're holding a shiny new iPad in your hands. Now what? How do you figure out which apps to download to help to make you a more effective, efficient lawyer? Well, you're in luck! Get started by downloading the 6 apps suggested below:

First, purchase PDF Expert ($9.99). It's my favorite app for PDF annotation and storage. Using this app, you can easily import documents from many sources, including email attachments, your computer's hard drive, Dropbox, SkyDrive and GoogleDocs. You can import a range of file types, including iWork, MS Office, Power Point, text files, images, music and video files and more.

Then, using this app you can fill in forms, add type-written text in any number of fonts and colors, or insert handwritten text into documents. You can also mark up documents by highlighting text or striking through words.

Fastcase is another great app. This free app includes cases and statutes from all 50 states and the federal government and allows you to conduct free legal research on the fly, even if you don't have a Fastcase subscription.

For a mobile scanner, consider the Scanner Pro app ($2.99). It allows you to use your iPad's camera to capture an image of the document, then converts it into a PDF which you can then email or upload into any number of integrated online storage services.

Every lawyer needs a "to-do" app and Any.DO is a great choice. This free app is user-friendly and versatile and is flexible enough to fit into most workflows. It's available as a browser extension for Chrome and other Web browsers as well as an iPad app. You can add tasks via the Web interface or the smartphone app, and can even share them with others if necessary.

But what sets it apart is the way that it integrates with your smartphone and with Gmail. So, if you add a task using your smartphone and the app will automatically include a link to any contact information stored on your phone relating to that person. The Web browser extension integrates with Gmail, prompting you to add an email-related task at the end of each email. The

task you create is then linked to the email, so that you can quickly return to the email, should you need to do so in the future. Finally, the developers recently came out with a great, free calendar app, Cal, that integrates with Any.DO and GCal or your native iOS calendar.

Next, download Google Now. This free app is Google's intelligent personal assistant that is designed to provide you with the information most relevant to your daily life, right on your smartphone. Like Siri, Apple's personal assistant, the Google Now app responds to voice commands and also provides "information cards" catered to your needs, based on your interaction with your phone. The information is gleaned from your phone's GPS data and the data that Google has collected regarding your search history. It then personalizes its results and predicts which "information cards" will be most useful to you.

And last but not least, don't forget about law practice management apps. Most reputable Web-based law practice management companies offer iPad (and iPhone) apps which provide lawyers with 24/7 access to their firm's documents, client files, contact information and more. And, some, such as MyCase's app (the company for which I work), even offer a client-facing app which allows clients to securely communicate with their lawyers and access all of their case-related information as well.

So there you have it — a great list of apps to get you started. Download a few of them and see how much your new iDevice helps you to streamline your law practice and improve your productivity in 2014!

Nicole Black is a director at MyCase.com, a cloud-based law practice management platform. She is also of counsel to Fiandach & Fiandach in Rochester and is a GigaOM Pro analyst. She is the author of the ABA book "Cloud Computing for Lawyers," coauthors the ABA book "Social Media for Lawyers: the Next Frontier," and co-authors "Criminal Law in New York," a West-Thomson treatise. She speaks regularly at conferences regarding the intersection of law and technology. She publishes three legal blogs and can be reached at niki@mycase.com.

By NICOLE BLACK

Daily Record Columnist

THE DAILY RECORD

LegalLOOP

Productivity apps help lawyers manage time

According to the American Bar Association's 2013 Legal Technology Survey, 91 percent of attorneys have smartphones and 48 percent use tablets in their practices. So more likely than not, you own either a smartphone, a tablet, or both. And now that you own a mobile device, why not use it to increase your productivity?

To help you do just that, here are some of my favorite productivity apps that you might want to consider.

First there is my favorite to-do/calendar app combo: Any.do and Cal. Both apps are free and were developed by the same company. Most importantly, the apps integrate, making your tasks and calendaring system a seamless, intuitive experience.

Any.Do is a user-friendly and versatile to-do app (iOS, Android, and web app) that is flexible enough to fit into most workflows. You can add tasks via the Web interface or the smartphone app. If you add a task using your smartphone and include the name of someone stored as a contact on your phone, the app will connect the task to your contact and will automatically include a link to any contact information relating to that person.

Another great Any.Do feature is that the Web browser extension integrates with Gmail, prompting you to add an email-related task at the end of each email. The task you create is then linked to the email, so that you can quickly return to the email, should you need to do so in the future.

Cal, the corresponding calendar app integrates with Any.do so your Any.do tasks are listed within the Cal interface. Cal connects with the native iOS app, Google calendar, or any other calendar that you've set up on your mobile device.

You can connect the app with your contacts so that whenever you enter an event, such as "Meeting with Mary," the app will search your address book and suggest contacts with that same name, which you can then link to the event. The app then automatically includes the contact information so that you can email or text him or her from within the event with just the touch of an icon.

You can also add a location and, once you've done so, the app suggests businesses that match the location. After you choose the correct business, a map appears along with a navigation button, so that you can then pull up turn-by-turn instructions via Google maps.

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If you're in the market for a voice mail system other than your phone's native system, YouMail, a free iOS and Android app, might be just what you're looking for. One of its best features is the ability to forward voice mails to your email. Being able to do this makes it much easier for me to remember to respond to or take action in regard to a specific message. You can also email a voice mail to someone else as well — something that occasionally comes in handy.

YouMail also makes it easy to organize your voice mails. Instead of being forced to store all of your voice mails in one location, you can create sub-folders (ie. "follow up," "work" or "personal"). Once you've done so, you can then file received voice mails into specific folders after you've listened to them.

For contact management, consider Brewster, a free iOS and Android app that facilitates contact management across your social networks. Once you download this app, it collects all of your social network contacts along with your phone's contacts into a fully searchable database. This is a wonderful feature because for those of you who travel often, since it makes it so much easier for you to locate (and network with) your connections who live wherever you happen to be traveling to.

And last but not least, Springpad is a great app for note taking and keeping your life — both online and offline — organized. Using Springpad you can create notes and collect and organize many different types of files — including photos, Web pages,UPCs (of wine, books or other items) scanned via your smart phone, online recipes, and notes or reminders — using any Internet-enabled device.

So there you have it — an assortment of apps to help you stay organized and increase your productivity. So why not get started today? Download a few apps and see how much time you save!

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