

The Law “Office” of the Future: Remote Access and Virtual Law Firms

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Presentation Outline

Introduction

Working Remote vs. Virtual Office

Working Remote

- Temporary way to work
- Access your office computer or server from anywhere
- Most staff is located in the office

Virtual Office

- Permanent way to work
- Everyone works at a different location
- Only the data is stored at a central location which may be online
- Staff can work from anywhere but often work from the same location every day

Remote Access

Taking Your Office Anywhere

Benefits

- **Flexibility** - Provides the ability to get things done when you are temporarily out of the office
- **Cost Savings** – Allows limited telecommuting
- **Work/Life Balance** – Gives you the ability to work from home part of the time rather than requiring that you always be in the office.
- **Client Service** – Make house calls, meet at their office, etc.

Two Ways to Work Remote

Connect to Your Data or Take Your Data With You

Connect to Your Data

Using this method you use whatever computer is available and convenient and connect back to another computer that holds your data. You can connect from a laptop that you bring with you, your home computer, or any computer connected to the Internet.

Take Your Data with You

Using this method, you use a laptop that holds all of the necessary data. Your data is always with you. Remote access is used to transfer files back and forth between your laptop and another computer.

Pros and Cons of Different Methods

- Security - Connecting to your data is always more secure. You have to establish a connection and enter a password. Even if your laptop is stolen your data is not on the laptop.
- Backup - Connecting to your data allows you to setup an automated backup of one location. You do not have to backup your office data AND your laptop data.
- Convenience- It is convenient and often faster to have files with you at all times. It is also helpful to have files with you when you cannot access the Internet (such as when you are on a plane).
- Cost - Connecting to your data requires two computers – one to connect from and one to connect to.

Remote Access

Hardware

Host Computer

The host computer is the computer that you will connect to when you are on the road. This can be a workstation type computer. It must have the following:

- High speed Internet (less waiting and more working)
- Program applications - The host computer must have all of the applications you are going to use installed on it.
- Remote Access - Some form of remote access must be enabled on the host computer.

Remote Computer

- The remote computer is the computer that you will use to access the host.

- For many remote solutions, it can be any computer. However, you will find that you use the same one(s) over and over (i.e. your home computer).
- If you are purchasing a mobile computer in order to remotely access your host computer, remember that the one CRITICAL factor is Internet connectivity.
 - WiFi is widely available for free but it is not available everywhere and it is not free everywhere.
 - Consider an air card if you travel extensively and do not know whether WiFi will be available.
- If the mobile computer's primary function is remote access, many of the normal speed and configuration considerations do not really matter.

Power Protection

- Uninterruptable power is essential. You cannot access your PC remotely if it powers down due a power outage (even one of a few seconds)
- Your UPS must be capable of handling the load of your PC, monitor(s), attached peripherals, etc.
- www.apc.com has a wizard that you can use to determine the appropriate unit for you needs
- (e.g.) APC Back-UPS RS 800VA 120V

Scanning and Printing

- The ScanSnap S300 is an excellent portable scanner with a very small footprint at a cost of around \$300.00
- The HP OfficeJet H470 or similar model can be used for mobile printing
- You will find you will scan more and print less often than you anticipate

Remote Access Options

Log Me In

www.logmein.com

- Accessible through any web browser
- Basic version is free and allows very simple remote control

- Pro version is needed for file transfer
- \$69.95 per year for pro version

GoToMyPC

www.gotomypc.com

- Standard version includes remote control, file transfer, remote sound and dual monitor support.
- \$19.95 per month or \$179.40 annual
- Can also be used to invite someone for one time support

Remote Desktop and Remote Web Workplace

- Remote Desktop included with Windows
- Remote Web Workplace included with Windows Small Business Server
- Free but requires static IP address

One Last Thing - Windows Updates

- Consider disabling or reconfiguring Windows updates on the host PC
- Updates seem to occur at the worst possible time and (with some operating systems) will reboot your system
- Set updates to be done manually – just remember to do them

The Virtual Office

Benefits for the Lawyer

- Reduced need for physical office space
- Practice anywhere
- Greater control over work-life balance

Benefits for the Client

- Increase online visibility
- Ease of online payments and collaboration
- Ability to offer alternative billing arrangements

Hardware for the Virtual Office

Virtual Office Setup

- In most virtual offices, remote users access and work on a remote server
- Users login to the remote server and draft documents, enter data and perform other functions as if they were sitting in an office attached to the server
- Files are saved to the server, just like an actual office
- Printing can be done locally or at a central location

Remote (Workstation) System Hardware

Exact remote hardware depends on the situation.

- **If all work is done while connected to the central server:**
 - Workstations do not need to be as powerful because they are not doing the work, the server is
 - The most important requirement is a fast Internet connection
- **If some work is done on the workstation only (disconnected from the server):**
 - Workstation must be powerful enough to run whatever applications are required
 - This workstation should be similar to a normal one in power

Host Server(s) Hardware

The exact server configuration depends on many factors.

- How many people will be accessing the system?
- How many people need to access the system at any given time?
- What are the data storage requirements?
- What applications do remote users have to run?

Typical Server Configuration

A typical server configuration (for 2 to 20 users) has two servers.

- **File Server**
 - Stores the files, hosts email, performs backup
 - Acts much like a server in a typical office that is not virtual
- **Remote Access Server**
 - This server acts as a host for remote users
 - All of the applications are installed on this server
 - It must be capable of these applications for the number of users you need to access it

File Server Specifications

The file server in a virtual office is very similar to one in a traditional office.

- Windows Server 2008 or Small Business Server 2008
- At least 4GB (8GB is even better)
- RAID array
- Expected cost \$2500 plus labor

Remote Server Specifications

If your office is small enough, the remote server could be an XP or Windows workstation. Make sure it has plenty of RAM and processing power.

In a larger organization, you will want a system designed as a server. Server systems are designed for higher uptime, fewer reboots, etc.

Either way, your remote server will need some sort of thin client installed to enable access.

Expected cost \$2000 for XP/Vista system with ThinStuff or \$3000 for server system with Terminal Server but Terminal Server is charged per license so it could be much more.

Remote Access Options

Remote access to a virtual office is best accomplished through a thin client solution – Microsoft Terminal Server or Citrix.

- Terminal Server or Citrix allows you to create a virtual desktop

- User login and see their “desktop” as determined by you
- Almost any application that can be run on a standard workstation can be installed to a Terminal Server or Citrix Server
- These products can be expensive (

A less expensive alternative is Thinstuff (<http://www.thinstuff.com>) which costs \$499.00 and can be installed on an XP or Vista workstation.

Note: Traditional VPN (one in which drives are mapped remotely) is not an option. This tends to be too slow for data transfer.

Virtual Office Tools

Other Virtual Office Hardware

Because a virtual office server needs to function like a server in any other office you need most of the other equipment necessary to run two servers

- Uninterruptable Power Supply
- KVM Switch
- Backup System

Virtual Office Software

While you can client-server software in a virtual office, there are additional web-based, software as a server (SaS), options.

- Web-based case management systems include Clio (<http://www.goclio.com>)
- Net Documents offers online document management (<http://www.netdocuments.com>)

Digital Dictation

Tapes do not work in a virtual office because they cannot be exchanged

If you must dictate, use digital dictation

- Dictations are saved electronically to the central server or emailed for transcription
- Once documents are finished they can be accessed on the central server

Communications

Internet

Reliable, large bandwidth, high-speed Internet is the lifeblood of a virtual office.

- Reliable = Provider with nearly 100% uptime is essential
- High Speed = DSL, Cable or T1
- Large Bandwidth = Capable of sustaining the number of connections you require
- **Static IP is an absolute necessity**

Email

Email communications are even more critical in a virtual office than in a normal office.

- Users must be able to access their email when connected
- Users must have some method for accessing email when not connected

Microsoft Exchange Server works very well because it can host and distribute email while users are connected and works with Blackberry and other remote devices.

Phone

Phones can be one of the most difficult aspects of setting up a virtual office because users are in diverse locations but have to stay connected.

Consider Virtual PBX, which offers many great features:

- Virtual receptionist
- Multiple extensions
- Voicemail
- Call routing
- Unavailable and away greetings
- Call forwarding allows you to set a phone number to reach you at
- Low cost (as little as \$30 per month)

How Does Virtual PBX Work?

1. Callers dial one number and reach a virtual receptionist
2. Virtual Receptionist offers them a choice of extensions
3. Extension routes to the user's phone
4. Voicemails are accessible via call-in or email

Fax

Paper faxing does not work in a virtual environment but Internet faxing works very well

Incoming Faxes

- Sender dials a number and has no idea that the service is Internet based
- Faxes arrive in an email inbox as PDF attachments

Outgoing Faxes

- Open the web-based interface
- Upload the document to be sent
- Recipient receives fax at their paper machine and has no idea the fax was sent via the Internet

Many Virtual PBX system include Virtual Fax as well

Things to Think About

Meeting Space

When meetings are necessary, be creative.

- Invite your client to coffee or lunch
- Make house calls
- Talk to another professional about a conference room sharing arrangement

Staying Connected

Working virtual has significant benefits but, for some, can lead to a feeling of isolation.

Get out of the office

- Public speaking
- Networking organizations

Get connected online

- Social networking sites like Linked In can help you feel connected to others
- Write a blog

Overcoming Tradition

For the most part, clients are concerned about service, not appearances

- Can they reach you by phone, email, mail? Yes
- Can you meet them if necessary? Yes
- Do you need a physical office to get their work done? No
- Does your office matter one bit with regard to court? No

In the end, overcoming tradition is more about changing attorney perceptions, including you.

Presenter Bio

Jeffrey S. Krause is a Wisconsin attorney and is the owner and founder of Krause Practice Management, LLC. Krause Practice Management provides technology advice and service to law firms of all sizes, with a focus on the efficient use of technology in the law office.

After beginning his career in private practice, Mr. Krause began assisting other attorneys to better use technology in their law practice. Since 1998, he has assisted hundreds of law firms through custom configurations, training and general support.

Mr. Krause is a Certified Independent Consultant (CIC) for the popular Time Matters Business and Practice Management software as well as its companion, Billing Matters. He has worked with Time Matters through its last five versions and has assisted hundreds of law firms during his eight years as a CIC. He is also a CIC for several other Lexis Nexis products including HotDocs and PCLaw.

Mr. Krause is a frequent author and speaker on a variety of legal technology topics and is the primary contributor to Jeff Krause's Practice Management Blog. His extensive background includes knowledge of document management, e-mail systems, litigation support, time and billing, web marketing and office suite applications. In 2006, he teamed up with Neil Johnson of Practice Development Partners and created the nationally recognized Time Matters Boot Camp training seminar. Time Matters Boot Camps are now routinely held at cities around the country. Prior to embarking on his career as a Technology Professional, Mr. Krause was engaged in the private practice of law. His legal background includes Plaintiff's Personal Injury, Insurance Defense, Real Estate, Land Use Planning and Corporate Law. Jeff is a 1996 graduate of the Marquette University Law School. He also holds a B.A. and M.A. in History from the University of Wisconsin-Milwaukee.