

Cloud Computing – The Cure for Global Warming

By Seth G. Rowland, Esq.

Global warming is a myth! Why else would we be sitting here in the tundra just a few miles outside New York City? Why else would we be facing yet another “snow day” away from the office? All kidding aside, whether you believe that “global warming” is the cause of the unseasonable snowy weather or that the snow disproves the warming trend, the reality is that we have had to spend more days “out of the office” this winter than in previous years. These “business interruptions” would have been less severe if you had moved some or all of your business to “The Cloud”.

The Cloud has different meanings to different people, much of it driven by marketing hype. For my purposes, I will define The Cloud as a bundle of software and computer services that exists outside the physical confines of your law office. These services run on computer hardware that is owned and maintained by a third party and provided to you on for a periodic fee based on usage. Usage is measured by number of users accessing the service, the amount of data stored or transferred, or the frequency of access.

Cloud services come in a variety of shapes and sizes:

- These services can be as simple as tools for secure “remote access” to your office or encrypted “offline backup” of your files.
- “Hosted servers” can be “rented” for document storage, managing emails, and even “virtual desktops” and “virtual servers”.
- Shared workspaces can be created for collaboration, for document production repositories, and for distribution of documents.
- Complete “practice management systems” can be secured for a small monthly fee; can be setup in minutes; and can be used to manage your matters, calendar, documents and billing.
- Powerful “document management systems” can be set up to manage all the document storage requirement of a large law firm without any hardware investment.

- Online document assembly systems, previously the domain of large law firms, are now available for a small monthly fee, and can be used internally by your staff, or externally by your clients (and potential clients).

The range of offerings has exploded in the last few years. It seems as if there is announcement for a new product or service every month. This article is your guide to understanding what these services are and how they might affect the way you will manage your law practice in the future.

The Rationale for Cloud Services

Computers are no longer a luxury; they are a necessity, and a single computer per attorney is no longer enough. The range of devices that must be networked to share information in a typical law firm include: desktops, laptops, tablets, cell phones, and file servers, not to mention all the home computers and the guest computers used when travelling. Managing information on this array of devices, synchronizing the files, and securing them from theft or intrusions is a gargantuan task. Add to this hardware costs for servers and networking, payment for internal and external technical consultants, and the never ending costs of software updates, and patches. This baseline represents your TCO or Total Cost of Ownership.

Cloud Services can reduce the TCO in a number of ways, bringing you financial savings, improved access, and peace of mind.

- First, cloud services require no additional hardware, no purchase of a software license, and no installation services. Upon

execution of the service agreement, you are provided a login and are ready to go.

- Second, while you will still need to configure your cloud service, migrate data and train users, cloud services are usually designed to be “easy” which means lower cost.
- Third, cloud services don’t require you to apply updates and patches; these are done centrally by the service provider, and are included as part of your subscription fee.
- Fourth, cloud services are designed to work equally well on a range of devices, whether computers, laptops, tablets or cell phones. The networking, security, and management features are included with the subscription fee.
- Fifth, cloud services are accessible from ANYWHERE you have an internet connection. A number of cloud services have “offline mode” for those rare times where you are not jacked into the NET.
- Sixth, tech support for cloud services is generally more accessible: via searchable forums, wikis and videos, email ticketing, live chat, and phone. And because the focus of support is on “functionality” rather than “installation and network” the support can be more substantive.

In evaluating whether “cloud services” are cost effective for your firm, you should evaluate the TCO of your existing system and compare it to the “subscription fees” of the cloud service. It is helpful to “annualize” your total costs for proper comparison. The “software cost” of a desktop product is not comparable to the “subscription fee” for a cloud service; services and hardware must be factored into the comparison.

Remote Access & Collaboration

The first step you will likely take into the Cloud is usually in the area of remote access. Simply put, whether it’s a snow day and you are working from home or you are on the road or on vacation, you will want access to your “desktop”. You will want to

be able to look at your calendar, work with documents, or perform research. If you have an on-call technician you can enable Microsoft’s remote desktop connection, configure your router, and setup a VPN. For the rest of us, you will find it easier to use a Cloud Service for safe, secure, encrypted connections to our desktop.

The easiest service to use is GoToMyPC from Citrix Online (www.gotomypc.com). Once you activate your subscription, you can download a “remote client” to your computer. When you are out of the office, just go to the GoToMyPC website and enter your login and password. Your desktop appears on any device, whether a PC, a Mac or a Tablet. Moreover, you can print documents to a remote print, and even stream videos.



For \$9.95/month you can have this service up and running in less than 5 minutes. Similar options are available from other vendors, including LogMeIn (www.logmein.com) , and NTR Service Desk (<http://www.ntrglobal.com/ntrconnect>) .

Conversely, the business of law involves extensive meetings and collaboration. Scheduling time for in-person meetings can take quite a bit of planning, time and money. However, anyone can make a phone call. What if, during the phone call, you can review documents, discuss a term sheet, even negotiate a lease. Web meetings are transforming the way law is practiced and the pace of work. GoToMeeting (www.gotomeeting.com) enables you to invite up to 15 people, from anywhere in the world into a virtual meeting. GoToMeeting provides a free conference call number. It allows you to share your desktop, change presenter, use drawing tools, and even record the meeting. You can attend a meeting from your Mac, PC or iPad. For \$49/month, you might even consider offering

"webinars" to your clients to promote your expertise. HDFaces™ from Citrix Online will soon add HD videoconferencing to the meeting mix.

There are a large number of other vendors offering web meeting technology. Cisco has a product called WebEx (www.webex.com/) which offer face-to-face meetings, along with desktop sharing. LogMeIn has a product call Join.Me (<https://join.me>). FUZE Meeting offers meetings with "high res", catering toward collaboration in graphic design (www.fuzemeeting.com). Skype, which is known for its real cheap phone service (www.skype.com) no includes desktop sharing as an option, though it isn't particularly fast. Their video conferencing technology is much better. Yugma (<https://www.yugma.com>) promotes its meetings as "free", but the free version only allows 2 attendees, which isn't much of a meeting. DimDim was recently acquired by Salesforce.com to enhance its private social networking platform, called Chatter ([www.chatter.com](http://www chatter.com)). This collaboration feature is will soon be available to users of AdvologixPM (www.advologix.com) which is built on the Force.com platform.

Offline Backup

Disaster planning and business continuity are often grouped with the perennial favorites, disability insurance and life insurance. Most likely you will not need to file a disability claim or life insurance claim. But when you do, you will be very glad it is there. What would you do if a hurricane swept into your town flooding the streets and knocking out power? Would you be able to continue to work from outside the office, access your files, and conduct business? And what if the server room would be flooded by a broken sprinkler system, as happened to a client of mine? Or what if your hard drive failed? These contingencies are low probability, but high consequence.

The solutions for business continuity can be quite expensive, until you weigh the alternatives. Many attorneys seem willing to roll the dice; waiting for that catastrophic server failure before they find religion. Cloud Services have no made it easier and much cheaper to do what you should have been doing in the first place; backing up your data to a location off-site.

Recognizing the problem, a friend of mine, Wells Anderson, set up a backup service for solos attorneys and small firms calls Active Online Backup (www.activeonlinebackup.com). He provides the personal touch, assisting attorneys define what files should be backed up, along with the backup service itself. Once you define what folders are to be backed up, these services run "automatically", moving copies of your data off-site, to safe and redundant servers. It is easy to restore selected files. However, wholesale server restoration can take a while.

Most backup services, and there are many, charge you based on the number of machines and the amount of data stored. Pricing can vary widely, as well as the level of service. There are a number of "consumer" services that heavily advertise on television, such as Carbonite (www.carbonite.com) and Mozy (www.mozy.com). While these services may be cheap, I would highly recommend you review the "Pro" versions of these products. They offer more storage and more features to enable you to manage restores. If you have a file server, you will discover that the Terms of Service expressly excluding backing up a server on the consumer version. I have found MozyPro easy to work with, but for the volume of files I store, I found it to be slow and expensive. Alternatives include iBackup (www.ibackup.com) which works with Macs and CrashPlan (www.crashplan.com). You can backup your data to Amazon S3 very cheaply (<http://aws.amazon.com/s3/>), but the pricing structure is Byzantine. JungleDisk (www.jungledisk.com) gives you the choice of backing up to Amazon S3 or to Rackspace through a custom interface that makes sense and at a price everyone can afford.

Hosted Servers & Private Cloud

There are times when managing a document server or a Microsoft Exchange server can be too expensive. Wouldn't it be great if someone else could take over that job and just send you a monthly bill. You would connect to these remote servers through the Cloud. Let the service provider take care of patching their server and update Exchange. There are dozens of vendors who provide Hosted Microsoft Exchange and Sharepoint for as little as \$5 a month per user, including

Microsoft itself (www.microsoft.com/exchange). Some will even give you a free copy of Outlook. The largest provider is Intermedia (www.intermedia.net). Other providers, like OwnWebNow (www.ownwebnow.com) may provide more storage space, or archive services and spam blocking. Wouldn't you like to get out of the business of managing email servers? An added bonus of Hosted Exchange is OWA or Outlook Web Access which gives you secure access to your email mail box, calendar and address book from anywhere.

You could even dispense with the Exchange Server and get a GoogleApps business account for \$25 a year per user and connect to Outlook via iMAP. You can add case management capabilities to your Outlook with Credenza (www.credenzasoft.com) from Gavel & Gown. For \$19.50/month per user you can have your practice management data backed up the Cloud, and be able to work with members of your group in different locations.

You can go one-step further and move both the server and the computer desktops off-site to the Cloud. Worldox is now offering the Worldox CompleteCloud (www.worldox.com/complecloud). Worldox sets up a server for your firm, with Worldox DMS installed, and it sets up a "virtual PC" for each user with Windows 7 and Office 2010. This is an outsourced and off-site complete network. There are similar offerings, from a number of vendors, including 8x8 Private Cloud (www.8x8.com) and Rackspace (www.rackspace.com).

Document Storage & Document Management

If you have "commitment issues", online document storage may be for you. DropBox (www.dropbox.com) is for those who want to dally before they take the plunge. It is free to sign up for 2 GB of online storage. DropBox creates a folder on your PC. Anything you drop into the folder is synchronized to the Cloud and any other PC, tablet, or even phone where you install DropBox. You can even share a folder with other DropBox users, and the files will be synchronized across all users. As an added bonus, for every invitation that is accepted you get 250 MB more of free storage. Or you can

take the plunge, \$199/year for 100 GB of free shareable storage. That's a lot of space.

Online folders are particularly useful for collaboration. No need to send out email attachments. Other services include Box.Net (www.box.net), SugarSync (www.sugarsync.com), eGnyte (www.egnyte.com) and LiveDrive (www.livedrive.com), to name a few. GoogleApps can also be used for online storage and collaboration. And opensource project Alfresco offers Alfresco Document Management Cloud (www.alfresco.com).

If you are willing to make more of a commitment, you should consider NetDocuments (www.netdocuments.com). This product was developed with the needs of attorneys for secure, online storage, with full text indexing and profiling. NetDocuments integrates with your Office applications and your MS Outlook. It is a fully functional document management system that allows you to save and profile documents to the cloud, with version control. You can create private workspaces for clients to access their documents or send links to their documents.

Online Document Assembly

For years, there has been just HotDocs for the solo attorney or small firm. Online document assembly was out of their price range, requiring them to set up a web server and pay substantial license fees. Legal Systematics (www.legalsystematics.com) offers one option with a hosted HotDocs server. Recently, two other vendors announced offerings geared for those with big ambitions and limited budgets. Last year, Business Integrity launched ContractExpress (www.contractexpress.com) powered by DealBuilder for \$199/month as a web service. Now you can sign up for a free trial and see how easy it is to create automated templates and access them from anywhere. Just markup your documents and upload them to the server and you are "good to go". And just this January, a new entrant, XpressDox (www.xpressdox.com) launched a hosted web server for the bargain price of \$29/month for your firm. That fee gives you up to 50 assembly sessions per month. You create the template in MS Word with an XpressDox ribbon to add variables, functions and rules. There is a lot of power and flexibility in this seemingly simple tool.

Practice Management Systems

The real test of your commitment to The Cloud comes in the area of law firm practice management systems. And here there are very real potential savings. This is a brand new space with a lot of energy and creativity. These are real pioneers who are rethinking the way we practice law and will practice in the future. These visionaries are changing the way we interact with our clients, and what level of service and information our clients can expect from us.

For years the legal practice management was dominated by the big-3: Time Matters, Amicus Attorney and ProLaw, followed by PracticeMasters and AbacusLaw, and then specialty vendors focused on corporate counsel or trial attorneys. These products offered incremental changes with upgrades, but no substantial design rebuilds.

Cloud Services for practice management present a new vision. They engage lawyers in a conversation, a dialog with their clients. Email templates, client portals, integrated web intakes, chatter, social networking, and file-sharing present a brave new world where "small clients" can get the royal treatment. And these features are all included in the subscription. Practice management in the cloud means all the things it does in the desktop products, plus more for less cost: contacts, matters, notes, tasks, calls, calendar, time and expense slips, invoices, and trust accounting.

AdvologixPM (www.advologix.com) is the most comprehensive and flexible of the Cloud solutions for attorneys. Because it is built on the Salesforce.com platform, it inherits all the security, flexibility, workflow, and reporting features that come with the product. On top of that the AdvologixPM "app" is a sophisticated product designed to meet the needs of the most demanding attorney. With Salesforce Chatter and Salesforce Content, AdvologixPM also includes collaboration technology, social networking, and file management.



The Advologix home page includes a bill time, Chatter for networking, recent items, and a navigator to ensure ease of use.

But this space has become crowded of late. RocketMatter (www.rocketmatter.com) has produced a Zen-like stripped down interface that does most of what a lawyer would need for practice management and can be learned in under an hour. Clio (www.goclio.com) gives you an online matter management system that focuses on task management, billing and trust accounting. The system runs on a PC, Mac, tablet or iPhone. HoudiniESQ (www.houdiniesq.com) offers a web-accessible legal practice management system that can run either on-premises or as a SAAS. Where RocketMatter and Clio focus on cutting-edge design and simplicity, HoudiniESQ, using flash is elegant and completely customizable. RealPractice (www.my.realpractice.com) takes a new tack. It offers a free single user version of its practice management system in the hopes you will retain them to develop your website. Another vendor, MyCase (<http://www.mycaseinc.com>) stresses integration with social networking.

LexisNexis is putting substantial effort into a new product for solos and small firms. It will soon be releasing Firm Manager (<http://www.myfirmmanager.com>). This product will offer a complete solution designed for ease of use. Built on the Silverlight engine, Firm Manager has the look and feel of a desktop application without requiring any installation. One innovation will be the inclusion of customizable and modular matter intake forms that can be used both by internal users and external users to enter information into the system.

In the coming year, more vendors will likely enter this space. New features will be added by the current vendors. It should get quite exciting with all this energy and innovation.

Get Off My Cloud

The options for lawyers to engage with their clients in The Cloud have never been greater. And the price for these cloud services has never been lower. Whatever your position on global warming, there is a cloud in your future. It may be nothing more than online backup and file sharing. Or, you may decide to "cut the cord," retire your file server to a junk yard for scrap metal, and move all your information

to the cloud. This article presents options; it can be done.

However, there are a host of questions you need to ask before you take the plunge. There are questions about the "terms of service" offered by these vendors. Who backs up the backup service? What happens if the cloud vendor closes its doors? Can you download all your data into a usable format? Is there a commitment to keep your information confidential? What sort of guarantee is there? Are you safe?

Be sure to do your due diligence. Speak to the vendor; check certifications. Find out the vendor's history. Get a client list. Remember, this is your information and your business. But be realistic. The level of technical support provided by a \$5/month vendor will be different from that provided by a \$500/month vendor. Free services are paid for by "someone".

But after you have done your due diligence, sign up for those subscriptions, upload your data to the cloud, and relax. Someone else will be taking care of business from now on, and you can go back to practicing law.

ABOUT THE AUTHOR: Seth Rowland, Esq., a recovering lawyer, was named TechnoLawyer Consultant of the Year in 2002 for his contributions to TechnoLawyer on the subject of document assembly and law practice automation. He is a nationally known technologist whose company, Basha Systems LLC <<http://bashasys.com>>, has helped many law firms build customized practice management and workflow solutions. Please feel free to visit his blog <<http://www.bashasys.info>> for the latest on document assembly and practice management. The author is a consulting partner for several of the products listed in this article and is on the advisory board for both Advologix and Firm Manager.