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Road Warrior
A Mobile Lawyer Tool Kit

By Jeffrey Allen

I define a mobile lawyer as one who does work outside of the office. Since almost all of us work at home, go to clients' offices for meetings, go to other attorneys' offices for depositions and meetings, go to court, or work from somewhere other than our office from time to time, most lawyers today are mobile; it's just a matter of degree. No matter how infrequently you actually work out of the office, you will find some mobile technology helpful. The more you work outside of the office, the more essential you will find these items. With that introduction, let me introduce you to the mobile lawyers tool kit.

Telephone

You undoubtedly will use a cell phone more than any other tool in the kit. Today you have many choices of phones and plans offered by an assortment of providers. Although most providers offer similar services, each provider has a different coverage area, so choose the one that provides the broadest and strongest coverage where you will use the phone the most (especially if you travel often). If you travel often enough, you may need more than one cell phone and provider to achieve satisfactory service.

Each carrier offers a variety of service plans; make sure you have enough time in the base structure—carriers charge premium rates for extra minutes. Don't fall prey to plans touting thousands of minutes, most of which are unusable during normal work hours, unless you plan to make the majority of your calls during evening and weekend hours. If you travel a lot, look for a carrier with a national plan that treats virtually all calls as local calls, wherever they originate in the United States (the national plans use the continental United States as the "calling area" for billing purposes). That means you avoid both roaming charges and long-distance charges in most cases. Some carriers also have regional plans that allow you similar privileges over a smaller, regional, area. If you don't travel enough to justify a national or a regional plan, but you do a reasonable amount of long-distance calling, a plan that includes all calls from your home area to anyone in the United States generally is a better value than per-call long-distance charges.

Phones sold directly by a provider generally have frequency locks so they work only on that provider's network. Generally, those limitations are imposed by the provider, not the manufacturer. Many manufacturers make phones that will work across several networks, but for the provider's lock. You can sometimes buy unlocked phones, but you will pay a premium for them, if you can find them. Generally, the discounts offered by providers make the acquisition of the locked phone a better choice.

Today's phones have an incredible array of features, and those that I find most useful include the following: (1) address book; (2) speed dial; (3) voice recognition dialing; (4) large display characters; (5) color screen (provides better reading contrast); (6) ability to synch to a computer address book (no retyping necessary); (7) headset compatibility (I've become partial to wireless Bluetooth headsets and prefer a Bluetooth-enabled phone); and (8) speakerphone. Most of the cell phones on the market include items 1, 2, and 7 (except for the Bluetooth part). Beyond that, they vary. Additional features to consider include calendars, built-in games, built-in cameras, web access, and the ability to marry with a fully functional PDA. I generally carry a phone with web access, which adds something to the monthly bill. The amount will vary from provider to provider and according to the access time you purchase/use.

PDA (Personal Digital Assistant)

After my cell phone, I use my PDA more often than any other tool in my kit. At the present time, I prefer having a separate cell phone and PDA, although I use converged devices from time to time. I strongly prefer the Palm OS (www.palm.com) to the Pocket PC (www.microsoft.com/windowsmobile/products/pocketpc), largely because of its almost trouble-free operation. Palm devices also seem to deliver better battery life and have a much larger available program library. I particularly like the new Palm OS 5, which brings much more power to the Palm platform and allows programs and auxiliary devices to access more memory and use more powerful microprocessors. One of the reasons I prefer a separate PDA and phone is that no manufacturer has yet offered a converged device that operates on the Palm OS 5 platform (although three are promised by the end of 2003).

Prices for PDAs are all over the board. You can get basic PDAs for under $100 and fancy ones for $800 or more. My current favorites in the market are the Palm Tungsten T3 ($399), the Tungsten C ($499) and the Sony Clie UX-50 ($799). All three operate on Palm's OS 5, have excellent color screens (Sony's is the best of the screens), considerably more memory, and faster processors than any of their predecessors. Additionally, the T3 has built-in Bluetooth, the Tungsten C has built-in Wi-Fi (802.11b), and the UX-50 has both.

I firmly believe that all attorneys should have and use PDAs. I prefer them to paper calendars because I can (and do) regularly back up all data by synching it with my computer.

Although I generally don't like reading long documents on the PDA screen, I carry a large library of information in my PDA in addition to my calendar and contacts. I carry the California Civil Code, Code of Civil Procedure, and Evidence Code, just in case I want to look something up while I travel. You can find many state statutes and portions of the federal code in electronic format, readable by PDA software. I can access periodicals and similar materials on the Internet and automatically download them to the PDA (Avant Go software, http://avantgo.com, facilitates this process). If you travel often, you'll likely find that carrying a few games can come in handy to help relieve stress and/or boredom.

Laptop

Today's laptops offer so many features and so much power that you can use them for virtually any aspect of your practice. Many mobile attorneys have opted not to have a desktop computer and simply use a powerful laptop, with a monitor, keyboard, mouse, and docking station at the office (and at home in some cases). Having one computer that goes everywhere with you and also serves as the desktop computer in your office definitely has some appeal. The fact that laptops and desktops often have substantially the same power and speed makes this option even easier.

I prefer having a separate laptop and desktop computer—if your budget allows, I recommend you do the same. I believe in backup and redundancy when it comes to protecting my work and my ability to function in my practice. Laptop computers get knocked about and occasionally dropped and tend to require repairs more often than desktops—at least mine do. Laptops can mysteriously disappear more easily than desktops as well. Whether I can't use a computer due to failure, damage, or theft, the bottom line remains that I cannot use it, which substantially impairs my ability to work. If my office desktop fails for some reason, I can always work on the laptop pending repair of the desktop.

This issue addresses backup elsewhere (see "), so I will just mention it in passing and not dwell on it here. You must do it and do it regularly. Use a two-stage backup process: (1) Back up the entire system (applications and data) on a regular basis (weekly, monthly, or quarterly, depending upon how often you change your program configuration); and (2) Back up data *every single day*. Make at least two backups, leaving one at the office and storing the other elsewhere for security. For both desktop and laptop backup, I like disk cloning software that allows me to recreate the drive on a new drive (or the same drive after reformatting) without having to reinstall every program. For data backup, any one of a number of programs will handle the process for selected files (or you can simply drag and drop).

For those of you who use more than one computer, the backup process can also facilitate the synchronization process that allows you to keep data identical for use on more than one computer. For that reason, I will explain the process that I use.

Make the task easier by organizing the hard disk so the data needing backup is in a few master folders. For example, all documents I create or save electronically from any source exist in client files on my hard drive, organized by content/matter/client, alphabetically. All my client files live in a folder called "Documents." Duplicating the folder covers 95 percent of the information that I need to back up on a daily basis. The other 5 percent lives in three other folders: accounting (includes billing and time records), PIM (includes calendar and contact information), and Palm (PDA synchronization backup files).

Those with small offices might consider backing up systems to a large-capacity hard disk, which can hold clones of several smaller hard disks. One 250 GB hard drive can carry the clones of six or more computers with hard disks of 40 GB or less. I strongly recommend a small-footprint, large-capacity disk drive for daily backup of data, which also can serve as an emergency drive to keep you going on the road if you have a problem with your hard disk or your operating system. I use a 60 GB hard disk (SmartDisk, www. smartdisk.com, $349) that fits in the palm of my hand. It leaves the office with me every day and travels with me on the road. I set it up with an operating system so the computer can boot to it as an external hard disk. I added key programming so I can work from it on the road (I included Microsoft Office, my billing and timekeeping software, an assortment of disk utilities, calendar, contact management and communications software). I also back up all of my critical data to it on a daily basis. I can synchronize my computers by replacing the same four folders I discussed above—it takes just a few minutes a day.

Presentation Technology

I find more and more reasons to have an LCD projector and a document camera in connection with my work. Multimedia presentations can enhance courtroom presentations and arbitrations as well as assist in conveying information to other attorneys and to clients in meetings. The cost of this technology has dropped dramatically in the last several years.

Projectors. LCD (liquid crystal display) and DLP (digital light processor) projectors have shrunk in size, increased in power, and dropped in price in the last few years. For most small office uses (other than courtroom presentations or presentations in large, brightly lit rooms), a 1,000-1,500 lumen projector will suffice (lumens measure the brightness of the image). You can find good small-footprint units weighing less than three pounds in the $3,000 price range. I like Hewlett-Packard's Xb31 unit ($3,495 and 1,200 lumens, www.hp.com) quite a bit. If you want a unit for courtroom presentations and/or use in large, well-lit rooms, you will need at least 2,000 lumens, preferably 3,000 ($3,000 to $4,000, between ten and 15 pounds). Look for continuing reductions in size and weight and/or price (generally this is a trade-off). As a rule, heavier and lower-resolution projectors cost less than lighter and higher-resolution ones. DLP projectors tend to cost and weigh less and have smaller footprints than LCD projectors. Purists may argue that LCD projectors produce more vivid colors and a brighter image per lumen than DLP projectors. Although there is some truth to this, DLP projectors produce very good images and have been the driving force in reducing size, weight, and cost.

Document cameras. Highly portable, very functional basic document cameras are available in the $1,000 range from AverMedia (www.avermedia.com) and Elmo (www.elmousa.com),

for example. Full-featured but still easily portable document cameras cost approximately $3,000 (I'm quite partial to Samsung's DLP-950 units, www.samsung.com; the standard model lists for $2,750 and the deluxe for $3,600). Document cameras enable projection of papers and 3-D objects that haven't been or can't be converted to electronic files.

Hauling It Around

The more gear you acquire, the more you will need viable ways to carry it with you. But you'll find you don't take all of it with you all the time. For this reason, you'll probably end up with a variety of carrying cases of various sizes and features. A few points are worth keeping in mind as you assemble this collection. First, if you pack it, you have to move it—if you have a lot of gear, get a case with wheels. You will travel faster, easier, and more comfortably. When choosing a large bag, look for one that allows some flexibility in packing so you can accommodate different groupings of your gear. Also look for a bag with outside pockets for easy access to the things that you use most, such as PDA, voice recorder, and cell phone. If you choose to get a case without wheels, remember that backpacks are easier on you physically than cases carried over the shoulder. If you do get a shoulder case, look for one with a wide strap and a well-padded shoulder rest. Be sure the bag provides sufficient protection for your gear. I'm particularly partial to cases by Brenthaven (www.brenthaven.com) and Swiss Army (www.swissarmy.com); both offer a number of well-designed cases for protecting your gear. If your case lacks sufficient padding, supplement it with a good computer envelope that fits inside the case.

Still More Tools

You may find additional tools that will help tailor your mobile office to best suit your practice. Consider the following:

Scanner. Some people like to carry scanners with them on the road. I have done so occasionally but usually I can get by without one or use a hotel business center to fax or e-mail a document to me. When I travel with a scanner, I want a small one. Visioneer (www.visioneer.com) makes the very usable, highly portable USB-powered (Windows) Strobe 100 ($199). The Travel-Scan 464 ($129) is also small, lightweight, and USB-powered and works very well (Windows and Mac).

Printer. I generally don't travel with a printer any more; I can e-mail files to myself, then download and print them at a hotel business center, another attorney's office, or a commercial business center. If you need or want to travel with a printer, Canon's new i70 (www.canon.com, Windows/Mac) turns out good-quality copy at the fairly rapid rate of 13 ppm for black and white and 9 ppm for color; but at four pounds, it weighs in on the heavy side. The i70 lists for $249. Canon's older BJC-55 ($349 list) and BJC-85 ($249) (two and three pounds, respectively) work at less than half of the i70's speed but can double as scanners by replacing the print cartridge with an optional scanner cartridge. All three can work from batteries.

Text messenger. Although many cell phones now have this feature, using them as a keyboard is very awkward; I prefer to carry a RIM (Research In Motion) device like a Blackberry. Text messaging is useful at times, and with a little practice you can get quite proficient with the "thumbboard" it employs. Such devices generally cost $300 to $400, depending upon features. They also require a service provider (another monthly charge that will be based on the service usage you purchase).

Digital recorder. The sound quality of digital recorders has dramatically improved in recent years, as has recording time. The best units can be used for everything from general dictation to recording a meeting. I particularly like the units produced by Sony and Olympus; they're reliable, and the higher end models work with voice recognition software. Remember that you can send a recorded WAV file by e-mail to your office for downloading and word processing or by telephone to a transcription service.

Digital camera. I use digital photography in my practice regularly and find digital images present better than do scanned film images. Excellent digital still cameras are available at reasonable prices from a variety of manufacturers, in sizes ranging from standard 35 mm

SLRs to credit-card-sized units. In my last column (GPSolo, June 2003, "Road Warrior") I discussed in some detail considerations for choosing a digital still camera. A basic digital camera should have at least two-megapixel resolution, optical zoom, an LCD display, and removable storage media. Stay with a manufacturer known for quality and good optics: Nikon (www.nikon.com), Canon, Sony (www.sony.com), and Olympus (www.olympusamerica.com) are reliable and offer models for beginners and experts alike.

Digital movie camera. Newer models of DV (digital video) cameras reflect significant advances in technology that have made them small, powerful, and reasonably priced. I have been very happy with a number of Sony, Canon, and JVC units. Go with optical over digital zoom (the better cameras include both), good optics, a reasonably sized LCD display, and an image stabilizer. Many DV cameras also will record still digital images, but at relatively low resolution, which makes the feature nice to have but not a replacement for a good digital still camera. If you get a DV camera with this feature, make sure it has a card slot for removable storage media for still images.

Cables. You will probably want to carry some basic cables with you when you travel. I always carry a retractable phone cord and a retractable Ethernet cable. If you take peripherals such as projectors, scanners, printers, cameras, and the like, you also should carry the appropriate interface cables.

Backup. A small footprint, high-density hard disk serves as an excellent backup device in and out of the office and can come in handy for keeping your computers up to date with new material. FireWire or USB 2.0 transfer data at satisfactory rates for such purposes. For small, critical amounts of data, you might consider USB drives that are about the size of your thumb —they're now reasonably priced (I have found them for as little as $39 after rebate for 256 MB). Larger capacity drives are available but tend to be more expensive per megabyte. This will change as the technology continues to advance and the larger units become more common. SmartDisk (www.smartdisk.com) and Other World Computing (www.otherworldcomputing.com) are good sources for online shopping.

Relaxing. The more you travel, the more you'll need to take a break every once in a while. For that reason, I have an assortment of games on my PDA and in my computer and a collection of music on my hard disk. When traveling for longer periods, I often bring along movies on DVD. I recently started carrying an iPod as well—think of it as a pocket-sized jukebox. Apple's iPod (which works with both Mac and Windows computers) comes in several storage capacities (up to 40 GB) and stores a tremendous quantity of music. The iPod can also function as an external hard disk to back up data as well as play music. If you often travel by plane or find yourself in noisy environments, consider replacing the earphones with noise-canceling earphones or a headset. Sony offers very good quality noise-canceling earphones, and Bose makes the Quiet Comfort II noise-canceling headset ($299).

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