

Being a Road Warrior Attorney:  
Staying Organized and In Touch While Out of the Office

PBA Solo and Small Firm Section

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Begin at the Beginning:  
What Does Your Law Firm Need to Access  
When On the Road?

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Ask Some Questions

- What are your firm's specific needs when people are traveling?
  - What do you need to accomplish?
  - Do different attorneys have different needs?
- Why do your people travel?
- Where do your people travel?
- What types of documents do you need to access?
- With whom do you need to communicate?
- How technologically savvy are the travelers?
- How technologically savvy are the clients?
- Level of security concern?
- Budget?

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Confidentiality is Critical

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Must Keep Client Data Confidential

- 1.1 Competence with technology
- Rule 1.6 Confidentiality of information (Comment 25)
- Shifting requirements based on:
  - Sensitivity of information.
  - Likelihood of disclosure if no additional safeguards
  - Cost of employing additional safeguards.
  - Difficulty of implementing safeguards.
  - Extent to which the safeguards adversely affect the lawyer’s ability to represent clients.
  - Consider relevant laws (such as HIPAA) or client requests.

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Hardware Choices

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### Laptop: Thin and/or Convertible

- Needs will impact cost of laptop
  - Unless editing video, an expensive laptop is not necessary
  - If editing video:
    - More ram
    - Higher processor speed
    - More hard drive space
    - High end video card
- Convertible laptop \$500-\$1500
  - Screen folds to form tablet.
  - Thin and light
  - <https://www.pcmag.com/roundup/346226/the-best-2-in-1-convertible-and-hybrid-laptops>
  - <https://www.techradar.com/news/mobile-computing/laptops/best-2-in-1-laptops-top-5-hybrid-laptops-reviewed-1258451>

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### Encrypt Laptop Hard Drive

- Prevents others from looking at content
  - As long as they don't have encryption key
- <https://www.pcmag.com/article/347066/the-best-encryption-software>




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### Tablet

- Microsoft Surface Pro
  - Capable of running full Microsoft Office Suite
  - Has USB ports for additional functionality
- Apple iPad
  - Many useful apps
  - Easy to use
  - Office 365
- Android Tablet
  - Many different types
  - Many useful apps
  - Some easier to use than others
  - Office 365

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### Tablet Security

- Use a password
- Install app that allows finding and wiping
  - Freely available on both Apple and Android tablets
- Enable iPad encryption
  - <https://www.zdnet.com/article/how-to-turn-on-iphone-ipad-encryption-in-one-minute/>
- Enable Android table encryption
  - <https://www.androidauthority.com/how-to-encrypt-android-device-326700/>

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### Smart Phone

- iPhone
  - Popular among lawyers
  - Easy to use
- Android
  - Many options
  - Can be more complex than Apple
    - Not as difficult as used to be
  - Inexpensive options available
- Use time keeping app
  - <https://blog.capterra.com/4-awesome-free-timekeeping-software-options-for-lawyers/>
- Use mileage/expense app

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### Smart Phone Security

- Turn on apps that allow finding and wiping
  - Freely available on iPhone and Android
- Turn on encryption
  - Normally involves checking a box
    - Search Google "phone model encryption"

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### Mobile Wi-Fi Hotspot

- Allows for portable, secure connectivity
- Can act as backup in office or at home
- Device potentially free with annual service contract
- Pay for device, pay as you go
- Cost of service varies based on amount of data use
- Device outright \$100-\$300
- Data \$10-?

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### VPN Router (Virtual Private Network)

- Stand alone device
- Allows users to connect to Internet (out and network (in) securely
- More advanced than software VPNs (Discussed shortly)
  - Balances use of bandwidth for quality purposes
  - Protects against failure to use software VPN
- Choose correct VPN Router for business size
  - Small router \$200-\$300
  - Small business router \$300-\$600
- Critical to install properly
  - Will likely need IT consultant or employee

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### Secure Your Home Router

- Be certain security is turned on
  - Router should have modern security – WPA2
  - Not WEP
- Change network name
- Change network password
- Home access is often the weakest point

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### Auto Bluetooth

- Allows connection of phone to car for hands free connectivity
  - Many cars already include
  - If not, can purchase device for between \$50-\$300

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### Additional Items

- Surge protector \$10-\$50
- Laptop lock \$12-\$50
- Spare cables for phone and tablet
- Portable battery to connect phone or tablet
- Strong cases for phone and tablet
  - Otterbox \$20-\$30
- Headphones
- Extension cord



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### Software/Service Choices

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### Use The Cloud

- Upload your data to server (computer) through the Internet.
  - Server normally owned by 3<sup>rd</sup> party.
- Access your data from any internet enabled device.
- Sometimes all data is stored on server
- Sometimes data is stored locally *and* on server




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### Rules Implicated by the Cloud

- 1.1 Competence
- 1.4 Communication
- 1.6 Confidentiality
- 1.15 Safekeeping Property
- 4.4 Respect for Rights of Third Persons
- 5.2 Responsibilities of a Subordinate Lawyer
- 5.3 Responsibilities Regarding Nonlawyer Assistance

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### Ask the Correct Questions

- Read the *entire* agreement
- Ask questions if you are not sure
- In most cases, you will not be able to alter the agreement

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### Privacy

- Where are the servers located?
  - Different countries, different laws
- Review the privacy policy

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### Security and Access

- Can employees (of cloud company) or contractors access the data?
- If service is not encrypted, can you add encryption
  - Non-encrypted service – Dropbox (can add encryption)
  - Encrypted service – SpiderOak

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### Reliability

- How old is company?
- Is it likely to go out of business?
- Does it have a lot of down time?
- Is data backed up?
  - Where is it backed up?

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### Portability

- Can you permanently delete data?
- Can you move your data easily?
- Who owns the data?
  - It should be your client

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### Factors to Consider

- Review Pennsylvania Bar Association Ethics Opinion 2011-200
  - Contains useful information on choosing a cloud provider

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### Sync Data on Cloud and All Computers

- Numerous options
  - Choose based on security needs, tech savvy, and price
  - Spideroak = very secure
    - Zero knowledge
    - Full encryption
    - Learning curve
  - Dropbox = less secure
    - Not zero knowledge
    - Not encrypted while traveling
    - Easy to use

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### Email, Calendar, Contacts

- Appropriate email service
  - Cloud services – Office 365 or Google Business
  - Exchange server in office
  - No Free Email Ever!
- Must preserve emails to client file
  - Use folders and rules to automatically sort emails.
    - Preserve when case is finished by exporting specific folder or saving as a PDF
  - Improve sorting with Add-ons
    - SimplyFile \$50
  - Use law practice management software that allows sorting of email to files
    - Both cloud and local options

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### Use Email Encryption

- Turns text into unreadable nonsense unless recipient has correct key
  - Prevents third parties from reading content
- ZixCorp
- PGP
- VeraCrypt
- AxCrypt

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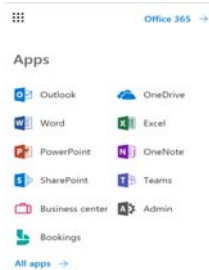
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### Office 365

- Purchase annual subscription
  - Use on computers, tablets, phones
  - Can work on documents seamlessly between devices
- Cost varies
  - \$5/month email only
  - \$8.25/month Office suite, no email
  - \$12.50/month Office suite & email




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### VPN – Virtual Private Network

- Software
- VPNs provide encryption to secure data sending over Internet
  - Even if connection is not secure
- Do not use free VPN – many are not secure and even add malware
- Samples:
  - Express VPN
  - Nord VPN
  - IPVanish
- \$4-\$15/month depending on payment plan

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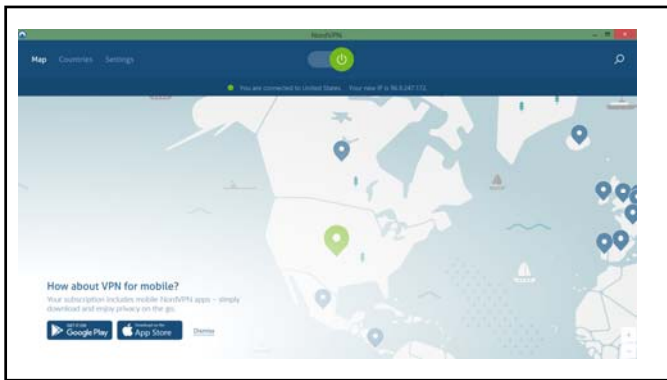
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### App to Download Smart Phone Content

- If communicate with clients through texts, must preserve to file
- Android: SMS Text or CopyTrans \$30
- iPhone: PhoneView \$30
- Also preserves call history, voicemails, WhatsApp data, etc.




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### About Texting With Clients

- Note: Recommend not texting with clients
  - Easy to delete texts by mistake
  - Difficult to collect time
  - Requires immediate response – law practice requires thought

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### Backup and Restore Phone Content

- Can sometimes restore deleted texts
- Useful for your own phone
  - Be careful before use in litigation
  - Could cause problems with chain of evidence
- Usable on prior iPhone backup on computer
  - Great for when drop phone in water and need to find data
- DrFone.com \$30

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### VOIP Phone Service

- Can include hardware and software
- Some allow cell phone to serve as business handset
  - Shows business number instead of cell
  - Can be set to call cell and office in any order
- Cost and service varies greatly
- Be aware of history of company, security issues, etc.

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## Some Traveling Tips

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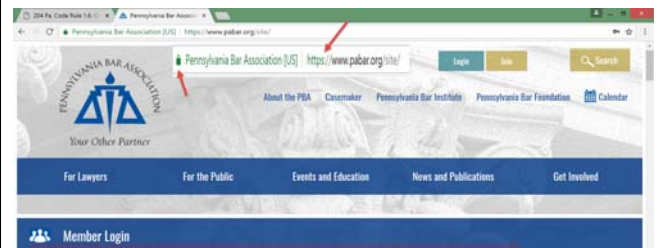
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## Be Aware of HTTPS v HTTP

- S means that the website itself is encrypted



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## Do Not Use Public Computers

Public computers such as those in coffee shops or hotels are not secure. They almost always have malware on them. This malware will steal all usernames and passwords you type into the computer.

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### Use Malware Protection on all Devices

There are many options for malware protection. You can purchase one suite and use it on your computer(s), phone(s), and tablet(s).

- Some IT professionals will discourage use of malware protection on servers. This is an outdated view. Your servers need protection.
- Even Apple devices need malware protection these days.
- Be certain to keep the malware software up-to-date. Automatic updates are your best choice.

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### Keep Your Computer's Operating System Updated

Either use automatic updates or keep a schedule.

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### Keep Systems Up To Date

- Update phones and tablets within a few days of any update
  - Often include security updates
- Do not use outdated technology

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### Have an Alarm System at Home

- If you keep files at home, you must keep them secure.
- Wireless alarm system that call you instead of an alarm company are available and inexpensive. They can be easily installed and do not require you to run any wires.
  - Use removable two-way Velcro stickers and you do not need to put holes in your walls or doors.

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### Encrypt USB Drives and External Hard Drives

Anything that can easily “walk away” should be encrypted. Many USB drives and external hard drives can be purchased already encrypted. There is also software available for easy encryption of these devices.

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### A Note About Airline Travel

- The smaller the better
- Purchase equipment that is sturdy
- Checkpoint friendly bags
  - Sleeves
  - Trifold Cases
    - Let you keep laptop in bag when open it
- Spare batteries may not be checked

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