

## Top 10 Tech Tools No Litigator Should Be Without

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You only need three things to practice law: a degree, a license, and a client.

Yet technology gurus and vendors continually trot out new hardware and software which, they contend, will “revolutionize” law practice. They claim their products will increase efficiency, make you more money, and give you more free time.

It seldom happens. That new software goes unused or under-used, and that great new gadget becomes a paperweight. Promised productivity gains never materialize. More time and money down the drain.

But there are some technology tools every litigator should have. In this article, I list the tools I believe will make your office more productive, improve your presentations, and perhaps save you money.

By tools, I don’t mean just computers or programs (though you do need a laptop to take to court). I also mean processes and procedures that attorneys and staff should follow.

Some of the tools I recommend are free. Some cost money. A few cost a lot of money. Each is worth it.

Finally, many of these tools will benefit all lawyers, not just litigators.

### Top Tool #1: Case Management Software – Amicus Attorney.

No practice, litigation or otherwise, should exist without case management software. My favorite is Amicus Attorney ([www.amicusattorney.com](http://www.amicusattorney.com)). Prices for a for a single lawyer and secretary start at \$698. I used Amicus as a solo with one secretary and a part-time bookkeeper, and convinced my partners to use it in my current three-lawyer, five-staff firm.

Amicus keeps track of your files, contacts, appointments, deadlines, phone messages and notes, e-mail, documents, and research. It links all those items together with an easy-to-use graphical interface. Amicus also can generate documents you set up in Word or WordPerfect, and can work with HotDocs or Amicus Assembly, a new proprietary document assembly program.

There are many other software programs that do the same thing as Amicus, such as Time Matters ([www.timematters.com](http://www.timematters.com)), Abacus ([www.abacuslaw.com](http://www.abacuslaw.com)), Needles, ([www.needleslaw.com](http://www.needleslaw.com)), designed for plaintiff’s firms, PracticeMaster ([www.stilegal.com](http://www.stilegal.com)), and The Master List ([www.themasterlist.com](http://www.themasterlist.com)), which takes a project-management approach to case management. For a complete list of case management programs and their features, try Law Office Computing magazine ([www.lawofficecomputing.com](http://www.lawofficecomputing.com).)

Before you buy any program, look at and use a demo disk. Ask for recommendations from other attorneys. Visit offices that use the programs and see how they work. This is a very personal decision, and one size does not fit all.

For a more in-depth article on case management software, see my article at [www.lissonlaw.com/legal%technology.html](http://www.lissonlaw.com/legal%technology.html).

## **Top Tool #2: Litigation Database – CaseMap.**

Cases come in all sizes, from he-said/she-said divorces to class actions with thousands of plaintiffs and tens of thousands of documents. I've handled both extremes, and many in between.

I once relied on my memory and my notes (dozens of legal pads and hundreds of loose pages) to keep track of facts, witnesses, and important papers. It quickly became clear to me: My memory is unreliable, and my handwriting is illegible. I tried long memos to the file, but they were just as hard to find, digest and keep current.

Enter CaseMap. CaseMap ([www.casemap.com](http://www.casemap.com)), is the premier program for litigators to keep track of facts, people, documents, and issues in a case. CaseMap puts a lawyer-friendly face on a relational database that does what litigators need: It links important facts to issues and the sources of those facts, whether people, documents, or statutes.

Need to know who said the light was red? Which e-mail from the plaintiff shows he wasn't harassed? What facts reveal a failure to mitigate damages? One click and CaseMap provides the answers.

CaseMap is not a panacea. You still have to distill information and enter it into the program. But that effort is paid back many times over when you need to prepare for depositions, summary judgment, settlement negotiations, or trial.

CaseMap gives a free 30-day trial. The publisher, CaseSoft (now part of Bowne DecisionQuest), has the best technical support I've found for any software anywhere. Cost of the program and 90 days of technical support is \$495, with discounts if you buy combinations of their other products.

## **Top Tool #3: Presentation Software – Sanction II.**

There are many ways to present evidence to a jury. I believe that the best method is to combine media – paper handouts, mounted enlargements, and computerized presentations/projections. Sanction II from Verdict Systems, [www.sanction.com](http://www.sanction.com), is the best software for computer-based presentations I've found.

Sanction costs \$595 per license, and is well worth it. Unlike Microsoft PowerPoint, which is fine for “static” or linear, pre-planned presentations, Sanction allows you to load documents, photos, video, and audio, and access them individually in any order you want. The program has tools that allow you (or your witness) to highlight, enlarge, and make changes to exhibits on the fly. The learning curve is moderate, but the payoff is tremendous.

The company is rolling out a web-based service to synchronize video depositions with a transcript which can be played through the software. Fees will be \$5 to \$30 per video hour, a fraction of the current cost.

Sanction is not the only player in this field. But it is the best I've found for dynamic presentations. I've used the program for trials, mediations, and even during conferences with counsel, witnesses, and clients.

## **Top Tool #4: Scanner – Your Choice.**

You need a way to get those photos, documents, and other evidence into your computer.

That's what a good scanner does.

The scanner you choose depends on your budget and needs. Our firm just bought a Xerox DocuMate 510 ([www.xeroxscanners.com](http://www.xeroxscanners.com)) for \$350. It's not the fastest on the market, but we don't need to scan 50 pages per minute. The 510 has an automatic document feeder, and also can be used as a flatbed for photos. (A good ADF is a must, unless you want to pay staff to stand by the scanner for hours, feeding page after page.)

For those who want to go "paperless" and scan everything, you'll want a faster scanner. Check the TechnoLawyer archives for scanner discussions and recommendations.

### **Top Tool #5: Projector – Boxlight.**

I use my projector all the time. Weekdays, I tote it to court and mediations. I use it in the office to make presentations to clients, and to train staff on office systems. Weekends, I show Disney movies to my kids.

My point is, a projector makes an impression. It shows counsel and the court that you're serious about a case. It shows clients that you understand technology and can manage their matters. And it shows your kids, well, movies.

The technology and price points here change so fast that I can't recommend a particular projector. I can, however, recommend a source: Boxlight, [www.boxlight.com](http://www.boxlight.com).

I found this company a few years ago when I spoke at the LegalTech show in New York. Though many others vendors also had booths, I was impressed at the time Boxlight took to listen to everything I wanted to do with the projector, the conditions in which I'd use it, and the research they did to recommend a projector to me. Their prices were excellent, and their service was superb.

I bought a Sony CP7311. Cost with a great screen, extra cables and an extra bulb, was about \$4,200. You can now get a better projector for less than half the cost. The projector with cables weighs about 10 pounds, can be used with lights and blinds open, and comes in a soft case that I can put on my shoulder and carry into a courthouse.

Don't skimp on a quality screen. The best projector can't make up for a poor surface for the projection.

Finally, don't judge projectors based solely on lumens, which is one measure of brightness. There are a lot of factors that go into a quality projector. That's why I relied on the experts.

### **Top Tool #6: Time Lines - TimeMap.**

Most of us think linearly, in chronological order. That's why one of the most effective ways to convey information is a time line. Nothing better shows the relationship between events.

Preparing these exhibits can cost hundreds or thousands of dollars for graphic artists, all of which can go to waste if testimony reveals a different date for just one of dozens of facts.

Enter CaseSoft again, and TimeMap ([www.casemap.com](http://www.casemap.com)). TimeMap is an easy-to-use program that makes time lines. You can enter dates and facts in advance or on the fly, and TimeMap will automatically position them appropriately on a professional-looking time scale.

TimeMap's newest version also can be used as a presentation tool. You can link documents to events in your time line, and with one click pull up a scanned-in letter or medical

record that supports the facts in the time line.  
Cost is \$199.

### **Top Tool #7: Document Management System – Windows Explorer/2xExplorer**

Call me cheap (I prefer frugal), but I believe Windows has built-in everything law firms need to manage documents. You just need a system. I do it as follows:

On the network server is a folder called “Client Docs.” (If you don’t have a network server, just designate one computer to store documents.) Each client gets his, her or its own folder, such as “Smith, Jane” or “ABC Corp.” Each client matter gets a folder within the client’s folder. And if there are a lot of documents, each client matter folder can have subfolders, such as “Letters,” “Pleadings,” “Photos,” etc.

So you’d find plaintiff’s responses to our requests to admit, which we scanned in for easy access, as follows: “F:\Client Docs\XYZ LLC\Jones v XYZ\Discovery\Pf’s Responses to Requests to Admit.pdf.” A letter with a settlement offer may be: “F:\Client Docs\Jones, Mary\Letters\letter to counsel re settlement.wpd.” Note the descriptive name of the file, instead of just “letter to counsel.”

When the matter is closed, burn the client’s folder to a CD and store it with the closed paper file. Then delete the folder on the computer.

Even if all you need to keep track of are documents your firm generates, this system makes it easy to find your firm’s work product.

I also recommend a folder on the network called “Forms,” with subfolders divided into practice areas. When the firm generates a new type of document, or updates an old one, copy the document into the “Forms” folder. A document may have a path like this: “F:\Forms\Corporate\Bylaws.wpd.”

I plan a longer article on file management in the near future.

Another method to find documents is AtLast’s File Notes Organiser Pro ([www.filenotes.com](http://www.filenotes.com)), \$49. This program will keep an index of documents on a network using keywords or descriptions added by the computer user when a file is saved. You can then search the File Notes database for documents, rather than searching entire hard drives.

Finally, if you use Windows Explorer much, you might look at 2xExplorer, <http://www.netez.com/2xExplorer>. This free utility does everything Windows Explorer does, but adds some features, the most useful of which is a third “pane,” so you can see multiple directories at once, without clicking between nested folders.

### **Top Tool #8: Productivity/Time Saver – ActiveWords.**

This difficult-to-describe program garners raves from those who use it. ActiveWords ([www.activewords.com](http://www.activewords.com)) lets you define words or letters to use as shortcuts to make your computer do things. The best way to describe ActiveWords is to tell you how I use it.

When I want to open the “F:\Client Docs” folder on the network, rather than click through a list of drives and folders, I type “fcd” and hit the space bar twice. Regardless of the program I’m in (WordPerfect, Word, Windows Explorer, etc.), I get the “open document” window displaying the contents of the “Client Docs” folder on the network.

I’ve written a script to open my web browser and automatically log onto Westlaw and

other sites. To open the Windows calculator, I type “calc” followed by two spaces. If I want to insert a section or paragraph symbol, I type “sec” or “para” in any program, and the § or ¶ symbol appear. If I type “esig” followed by two spaces, my electronic signature is inserted into a document or e-mail.

ActiveWords won’t save you hours daily. But if it reduces your “click” and “type” time by just two minutes a day, that’s nearly nine hours a year. Cost starts at \$19.95.

### **Top Tool #9: OCR - Abby FineReader.**

Optical character recognition (OCR) is the “holy grail” of scanning. It takes a text document and turns it into an electronic version you can edit. FineReader has the best accuracy I’ve found. And though the process isn’t perfect, it does a good job of preserving the formatting of a scanned document transferred directly into Word or WordPerfect.

FineReader ([www.finereader.com](http://www.finereader.com)) costs \$149.99 if you own any OCR software, which likely came with your scanner.

### **Top Tool #10: Photo Viewer – SlowView.**

This is another free utility ([www.slowview.at](http://www.slowview.at)). SlowView lets you browse graphics, photos, video, and audio in a folder. It shows thumbnails in one pane, and a large version of the photo in another. Excellent program when you need to compare photos of evidence, family vacations, etc., and decide which ones to print or use for presentations.

### **Honorable Mentions.**

I frequently “capture” web pages, to keep records of online orders, or for litigation purposes. (It’s amazing what you can find on your opponent’s web site.) The best tool I’ve found for the job is Adobe Acrobat, [www.adobe.com](http://www.adobe.com), about \$250 street for the latest version without an upgrade. Once you capture the pages you want, you can click through them as if you were on the Internet. Acrobat has other fine features as well.

FinePrint, [www.pdfactory.com](http://www.pdfactory.com), lets you print multiple pages of a document on one page, similar to a compressed deposition transcript. Some word processors have this feature, but it doesn’t work nearly as well. Cost is \$109.95.

NoteMap, [www.casemap.com](http://www.casemap.com), is far superior to the outliners included in word processors. It also can be used as a presentation tool, and includes the ability to attach files to notes. Cost is \$149.

IMSI Flow Charts and More, [www.imsisoft.com](http://www.imsisoft.com), \$39.95. Easy to use program to create professional looking charts of all types. Great for showing relationships between witnesses, family trees, decision trees, etc.

Hand-numbering Bates stamper. Cost is \$30, available at office supply stores. Use this device to track documents in discovery. See the article, “Tracking Documents in Litigation for Less Than \$30,” on my web site, [www.lissonlaw.com/legal%technology.html](http://www.lissonlaw.com/legal%technology.html).

### **About the Author:**

Jeffrey S. Lisson is the civil litigator in the three-attorney firm of Carter & Boyd, P.C., in San Angelo, Texas. He was a sole practitioner for 10 years in Winston-Salem, North Carolina. He has lectured nationally on legal technology, and his writings have been appeared in bar journals and legal technology publications across the country. This and other articles are available on his web site, [www.lissonlaw.com](http://www.lissonlaw.com).