

Introduction

The Google Apps Suite

The Google Apps suite is a collection of web-based software and tools that allow you to create, share, and store documents on the Internet and communicate online (<http://www.google.com/enterprise/apps/business/products.html>).

These include:

- **Gmail** (e-mail)
- Ancillary tools found within **Gmail**
 - **Hangout** (video conferencing for up to ten people)
 - **Call Phone** (using your computer to call someone's phone)
 - **Voice Calling** (using your computer to call someone's computer)
 - **Chat** (one-to-one text chat)
- **Google Calendar** (appointment calendar)
- **Google Docs** (word processing)
- **Google Spreadsheets** (spreadsheets)
- **Google Presentations** (slide presentations)
- **Forms** (such as client intake forms)
- **Sites** (websites)
- **Drive** (storage)

This book focuses on just two of the many tools in the Google Apps suite: Gmail (and its Ancillary tools listed above) and Calendar. Before you can make use of the Google Apps suite, you need to sign up for one

of Google's seven types of accounts (which are explained beginning on page xxv).

Because these tools and the related document storage are all web-based and require little more than an Internet connection and a web browser to access, they are referred to as “cloud computing” applications (see Appendix A for a more detailed explanation of cloud computing).

PRACTICE TIP

Why We Use Google Apps for Our Law Office

Chad Burton, Principal in the seven-lawyer, Dayton, Ohio-based Burton Law firm, cites a number of reasons for switching his firm to Google Apps for Business. “We have a virtual law firm with lawyers working in a distributed manner around Ohio and North Carolina, and Google Apps makes it easy for everyone to connect,” he said. “Google Apps integrates with our other practice management platforms—Clio and Box—and the \$50 per year price point is excellent for what is provided.”

Burton made the decision to switch his full service and virtual law firm to Google Apps for Business two to three years ago because of the “user interface, 25 GBs of storage, and up-time guarantee,” he said. “I also like the ease of use with mobile devices, including iPhones and iPads, and also back when I unfortunately used a Blackberry.”

Security, Confidentiality, and Ethics

Some of the first questions we get when discussing Google Apps are “What about the security, confidentiality, and ethics of the information stored in those documents and e-mails?” and “Is it secure enough for lawyers to use?” We wouldn't be writing this book for lawyers if the answer were no. (See Lesson 22 for a full discussion.) Even with the security measures Google has in place for Google Apps, you still have a responsibility

to make your account as secure as is reasonably possible by using a strong, hard to guess, password and 2-step authentication to access your account. (See Lesson 19 for more details about 2-step authentication.) You should also continually focus on security in everyday use and consider additional security features as they become available.

Millions of corporations, small businesses, solo lawyers, large and small law firms, and federal, state, and local governments have “gone Google”—meaning that they have moved from hosting their own e-mail servers (and in some cases calendars and documents) to using Google Apps. Companies that have gone Google range from Konica Minolta and Jaguar to the solo law practice Craig Law Firm (North Carolina) and the twelve-office law firm Bradford & Barthel. Government users include the U.S. General Services Administration, the U.S. National Oceanic and Atmospheric Administration, the State of Wisconsin, the New Mexico Attorney General’s Office, the City of Los Angeles, and the City of Pittsburgh.

“As a law firm handling confidential information for our clients, Bradford & Barthel takes security extremely seriously,” said the firm’s Director of Knowledge Strategy and Technology, Eric Hunter, in a guest post on the Official Google Enterprise Blog (<http://linkon.in/VvM3pL>). “We’re responsible for private information on individuals and companies, and our best security option is Google Apps,” he continued. “Google has many security features—SAS70 Type II certification and two-step verification included—that allow us to feel confident our data and the data of our clients is much safer than if we hosted it on premise.”

Focus on the Practical Use by Lawyers

The book is designed as a step-by-step guide for lawyers to learn what features and functions are available in Gmail and Calendar, as well as some ancillary services including Google Chat, Hangout, and Call Phone. You

will learn how other lawyers are already putting those tools to work in their practices, and be provided ideas on how you could put those tools to work in your practice.

In particular, the book focuses on these tools as accessed via the paid Google Apps for Business account (see page xxvi). However, the majority of features and functions we describe are also available to users with free Google Accounts. We primarily use our own Google Apps for Business account to illustrate how a law firm might integrate these tools into its practice.

While this book is not intended to be an implementation guide for IT professionals, we realize that some solo and small firm attorneys might actually be the IT person at their firm. Lesson 19 provides information for those attorneys. (Attorneys not managing their own Google accounts

PRACTICE TIP

Why We Use Google Apps for Our Law Office

“We used to run an on-site Microsoft Exchange Server for our e-mail and calendars. It worked okay,” said Clayton Hasbrook, an associate at the Oklahoma City firm of Hasbrook and Hasbrook, a three-lawyer firm handling insurance law, employment law, and personal injury matters. (See his post on the firm’s blog, “Injury Attorney Resource Center” at <http://linkon.in/VJuPoH>). “Any time we had problems with it though, we’d have to call our tech guy.

“We ended up switching to Google Apps in 2009,” he said. “The main reason I prefer Gmail to Outlook is that it groups everything by conversation. This saves time and is really easy to use. Plus, we’ve never had to call our tech guy about e-mail or calendar problems.

“For those in your office who swear by Outlook, they can still use it,” he continued. “The back-end will be the only thing different. But it will generally be easier to log on from the Internet and sync your phones to it. We had people in our office that stayed with Outlook after we initially switched over. Within two weeks they were using Gmail full time.”

can probably skip this lesson.) With that said, some of our step-by-step illustrations of the lesser-known features of Gmail could be useful to IT professionals as they deploy Google Apps in their firms and train their users.

Why Use the Cloud-Based Google Apps Suite's Calendar and Gmail over Conventional Calendar and E-mail Software?

For the law firm of Bradford & Barthel, “Technology like Google Apps and social applications are creating a culture where the legal industry is much more connected with clients and clients have much more access to information about the law,” the firm’s Hunter said in that same blog post (see page xix). “Our primary reason for investigating Google Apps back in 2009 was to start preparing our firm to keep up with this new culture of constant communication and to help employees enhance client relationships through better sharing and collaboration.”

“Since we migrated to Google Apps in April 2010, we’ve made collaboration much easier and more efficient through the use of Google Sites, Google Docs, and shared Google calendars,” Hunter added. “Our attorneys have found Google Apps to be intuitive and flexible.”

From a practical, day-to-day perspective, the cloud-based Google Apps suite’s Calendar and Gmail offer a number of advantages over conventional software as discussed below.

Access Your E-mail from Any Web-enabled Device, From Anywhere at Anytime

You can check and send e-mail or add events to your calendar using any device from anywhere, as long as it has an Internet connection. The device could be your laptop or desktop computer (or one at a hotel’s

business center). The device could also be almost any web-enabled mobile device such as Android, iOS (iPhone or iPad), BlackBerry, or Windows Phone using the device's dedicated Gmail application, or through a web browser.

USAGE TIP

Using a Public Computer Like Those in a Hotel's Business Center Is Not Recommended

There have been a number of reported incidents of software and hardware clandestinely installed on business center computers that can steal passwords or confidential information on the computer before it travels over the encrypted connection. They range from hard-to-detect spyware installed on the computer's hard drive to a small keylogger device that can be plugged into the computer where it's concealed from view. Additionally, these public computers often are not securely configured and lack current security software.

Automatically Sync Your E-mails and Calendar

With conventional calendar and e-mail software, you may have to install software on each device and then manually sync your data frequently. With Google Calendar and Gmail, you do not need to install any software and you do not need to manually sync any of your devices; it happens automatically because the suite tools and your data live in the cloud.

USAGE TIP

Even without an Internet connection, you may be able to at least view your Gmail messages and your Calendar (see Lessons 2 and 18, respectively, for details).

Integrate with Practice Management Software

As practice management software has evolved, vendors of traditional and cloud-based practice management software have built-in the ability to integrate messages and/or appointments from Gmail and Google Calendar into their products. Some of the most popular of these include **Abacus** (<http://www.abacuslaw.com>), **Advologix** (<http://www.advologix.com>), **Clio** (<http://www.goclio.com>), **HoudiniESQ** (<http://www.houdiniesq.com>), **MyCase** (<http://www.mycase.com>), and **Rocket Matter** (<http://www.rocketmatter.com>).

When discussing Rocket Matter's integration with Google Calendar, company CEO and Founder Larry Port explained, "Our Google Calendar integration is a full-two way sync and allows users to leverage Google's powerful calendaring tools and Rocket Matter's billing capabilities. The two-way sync supports advanced functionality like recurring events, alarms and notifications, and coordination across all attendees of an event," for example. "Since Google Calendar integrates with a variety of software and devices, Rocket Matter two-way syncing extends to those platforms as well: an event created in Rocket Matter will show up in Outlook, Apple's iCal, or Android, iPhone, and iPad mobile devices," he continued.

Save Money

- The Google Apps accounts range from free to \$50 or \$100 per user per year (as of this writing), depending on which type of account you select (see page xxv, Types of Google Accounts) vs. the \$200 price for one copy of Microsoft Office Home and Business.
- There are no upgrade costs. When new features and functions are introduced to the Google Apps suite, they appear automatically.
- You may be able to reduce your IT expenses because Google's engineers are maintaining the servers that handle your mail.

The Health and Security of the Servers That House Your Data Are Monitored 24/7

Google's engineering staff:

- Regularly update their servers to include the most up-to-date security patches.
- Continually test their servers' hard-drives and replace them before they fail, so you don't lose any of your data.
- Create redundant back-ups of your data to guard against loss.
- Physically secure their data centers with fences, guards, and key card and biometric access.
- Give random file names to "data chunks" and do not store the data in clear text, which makes them not humanly readable to anyone but you and those with whom you share the document.

Gmail Provides You with Large Storage Space for Your Messages and Offers Large File-Attachment Limits

Free Gmail accounts and free Google Apps Accounts now come with 10 gigabytes (GB) of storage space for e-mail messages and attachments. You can upgrade a free account to 25 GB for \$2.49/month, but Google Apps for Business accounts already come with 25 GB of storage space as part of the \$5 per user monthly fee.

Gmail Provides Strong Spam-Filtering

Regardless of how you access your messages (e.g., from your laptop, your phone, Outlook . . .), you will benefit from Gmail's strong spam-filtering capabilities.

Google Provides Powerful Search and Retrieval Capability for Gmail and Calendar

Because Gmail and Calendar are operated by Google—a well-known and powerful search engine for the web, they benefit from the same powerful search-and-retrieval capability when you are trying to find a message, an attachment, or an event. Many of these advantages are discussed in detail later in Lesson 6.

Types of Google Accounts

There are seven account types you can create to access the tools described in this book (see Figure I.1).

The type that you're probably most familiar with is the free consumer **Gmail Account** (e.g., `mrosch@gmail.com`). This type of account is meant for the personal use of one individual. If you have a Gmail address, you already have access to the free versions of these tools. To set up a Gmail account if you don't already have one, visit <http://www.gmail.com>. All e-mail and documents created in this consumer version are connected to a generic `username@gmail.com` address (e.g., `mrosch@gmail.com`).

Beyond the free consumer **Gmail Account**, there are six other types of accounts for accessing Gmail, some free and some paid. They are intended for business use and are called:

- **Google Apps.** (Free.) You can customize these tools for your own Internet domain name (e.g., `netforlawyers.com`), with up to 10 users with a customized e-mail address (`mrosch@netforlawyers.com`). Note that as of December 2012, new customers can no longer create these types of free accounts, but they will remain free to those who had already created them.

- **Google Apps for Business.** (Paid; \$5 per user (for an unlimited number of users) per month or \$50 per user per year when automatically billed to a credit card.) While similar to the free Google Apps version, this type of account adds greater storage capacity, additional security features for mobile devices, dedicated technical support, and certain service guarantees.
- **Google Apps for Business with Vault.** (Paid.) An additional \$5 per user per month adds the **Vault** corporate message retention, governance, and compliance tool (discussed in Lesson 20) to a Google Apps for Business account.
- **Google Apps for Education.** (Free.) This account is the same as the Google Apps for Business account, but it is provided for free to selected educational institutions.
- **Google Apps for Government.** (Paid.) Available to governmental agencies, this account is the same as the Google Apps for Business account.
- **Google Apps for Non-Profits.** (Free.) Provided for free to selected non-profit organizations, this account is the same as the Google Apps for Business account.

All of these accounts work the same way and offer the same level of security. However, the paid accounts offer a few additional features, such as more technical support, more storage space, guarantees of service (a.k.a. uptime), and the ability to disable ads in Gmail, among others. Therefore, while we've stated that this book focuses on these tools as accessed via the paid Google Apps for Business account, the information is applicable no matter which type of account you are using. One small difference between the free and paid accounts is that the free account uses the label "Gmail"

for e-mail messages while the paid account uses the label “Mail.” Depending on which account was used when we took screen shots, you will see one or the other.

Figure I.1 Google Account Comparison

Calculate your savings
Use our [simple calculator](#) to learn how much your business can save with Google Apps.

Google Apps for Business
Business-ready
[Start Free Trial](#)
\$5/user/month or \$50/user/year

Google Apps for Business with Vault
With advanced security and e-discovery features
[Contact Sales](#)
\$10/user/month

Key Features	Google Apps for Business	Google Apps for Business with Vault
Inbox size	25 GB	25 GB
Included Drive storage (need more?)	5 GB	5 GB
Custom email address	✓	✓
Unlimited users	✓	✓
Video chat, calendar, document editing and more	✓	✓
Business controls	✓	✓
24/7 customer support	✓	✓
99.9% uptime guarantee	✓	✓
Business-critical data archiving		✓
Data retrieval for investigation		✓
Company-wide data discovery and export		✓

(<http://www.google.com/enterprise/apps/business/pricing.html>)

Which Type of Account Is Appropriate for Lawyers?

We used to recommend that solos and small firms begin by using the free Google Apps Account to test drive the service and that larger firms and government agencies begin with Google Apps for Business from the outset. But, as noted earlier, the free Google Apps Account no longer

exists for new users, so all lawyers will need to sign up for the Google Apps for Business account. Even with its (minimum) \$50 per user per year price tag, it can still be a big cost-saver compared with other e-mail service providers. It's also a good choice because it comes with technical support while the free account did not. Fortunately, Google Apps for Business offers a thirty-day free trial for you to evaluate the service. For those who created a free Google Apps Account before Google ceased offering it, conversion from the free Google Apps Account to the paid Google Apps for Business account is seamless.

Conventions Used in This Book

Throughout the book we use **boldfaced** type to indicate exact text that appears onscreen in links, buttons, drop-down menus, labels, etc., for the features and tools we discuss (e.g, **Compose, Attach a file**) as well as the first instance of key terms. Additionally, we use italics to indicate exact text (search terms/keywords) typed for sample searches.

Throughout this book we offer **Practice Tips** from lawyers who are using Google Apps in their practice and **Usage Tips** that are more general.

PRACTICE TIP

Before using any cloud computing service provider, lawyers should make a reasonable effort to insure that confidential client information stored on those systems will remain confidential. The recent addition of a new Paragraph (c) to ABA Model Rule 1.6 (<http://linkon.in/OYJllc>) reads, “A lawyer shall make reasonable efforts to prevent the inadvertent disclosure of, or unauthorized access to, information relating to the representation of a client.” Lesson 22 of this book looks at security practices Google has put in place for the information stored in Google Apps and surveys State Bar ethics opinions related to cloud computing services.

USAGE TIP

If you sign into Gmail from multiple computers, but are worried you may have forgotten to sign out of one, you can sign out remotely. At the bottom of your Inbox, you'll see information about the time and location of the last activity on your account. Click **Details** to see whether your account is still open in another location and **Sign out all other sessions** to close all other open sessions. Also see the Usage Tip, *Using a Public Computer like Those in a Hotel's Business Center is Not Recommended*, on page xxii, warning against using public computers.