



Integrating an iPad into your Practice

Seminar Topic: This program is designed to help you integrate an iPad into your practice. It begins by addressing why you should consider an iPad instead of a different tablet. It then addresses the benefits of a paperless office. It also explains the benefits of using the cloud and how well the cloud integrates with the iPad.

The remainder of the program discusses a number of the apps available for the iPad and how they can benefit the practitioner.

This material is intended to be a guide in general and is not legal advice. If you have any specific question regarding the state of the law in any particular jurisdiction, we recommend that you seek legal guidance relating to your particular fact situation.

The course materials will provide the attendee with the knowledge and tools necessary to identify the current legal trends with respect to these issues. The course materials are designed to provide the attendee with current law, impending issues and future trends that can be applied in practical situations.



Copyright © 2018

Printed in the United States of America. All rights reserved. No part of this monograph may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage and retrieval system, except for citation within legal documents filed with a tribunal, without permission in writing from the publisher.

Disclaimer: The views expressed herein are not a legal opinion. Every fact situation is different and the reader is encouraged to seek legal advice for their particular situation.

The Apex Jurist, www.ApexJurst.com is
Published by ApexCLE, Inc.
www.ApexCLE.com

119 South Emerson St.,
Suite 248
Mount Prospect, Illinois 60056

Ordering Information:

Copies of this monograph may be ordered direct from the publisher for \$64.95 plus \$4.25 shipping and handling. Please enclose your check or money order and shipping information. For educational, government or multiple copy pricing, please contact the publisher.

Library of Congress Cataloging-in-Publication Data

ApexCLE, Inc.

1. ApexCLE, Inc. 2. Law-United States – Guide-books.
3. Legal Guide 4. Legal Education.



About the Author and Presenter

Bryan M. Sims

Bryan Sims is a shareholder and founder of Sims Law Firm, Ltd., where he concentrates his practice in the areas of commercial litigation and civil appeals. He is a member of the Illinois Bar and the Northern District of Illinois Trial Bar. He is also admitted to practice before the United States Supreme Court, the United States Court of Appeals for the Seventh Circuit, the United States courts in the Central District of Illinois, the Southern District of Illinois, and the Eastern District of Michigan.

Bryan is a member of the Illinois State Bar Association, the American Bar Association, the DuPage County Bar Association, and the Will County Bar Association. He is a member of the ISBA Standing Committee on Legal Technology, where he currently serving as the chair and previously served as the newsletter editor. Since 2006, he has been a member ISBA Solo and Small Firm Conference Planning Committee.

Bryan has spoken on legal technology issues at the ISBA Solo and Small Firm Conferences, Wisconsin Solo and Small Firm Conferences, for the DuPage County Bar Association, the Chicago Bar Association, the Winnebago County Bar Association, the Lake County (Indiana) Bar Association, the Lake County (Illinois) Bar Association, the International Technology Law Association, National Business Institute and ABA Techshow. Also he was the featured speaker at the 2014 Oklahoma Solo and Small Firm Conference.

Bryan has contributed to TechnoLawyer and was recognized as the 2005 TechnoLawyer of the Year. He has also written for PDA JD and regularly wrote reviews for Law Office Computing. Bryan blogs about the intersection between law and technology at www.theconnectedlawyer.com.

Before entering private practice, Bryan worked as a judicial law clerk for Illinois Supreme Court Justice S. Louis Rathje. He has also worked as a staff attorney for the Second District of the Illinois Appellate Court.

He is a 1993 Cum Laude graduate of Wheeling Jesuit University and a 1996 Magna Cum Laude graduate of Loyola University Chicago School of Law. While in

law school, Bryan served on the staff of both the Loyola Law Journal and the Loyola Consumer Law Reporter.

Author's Email Address: bsims@simslawfirm.com
Author's Website: www.simslawfirm.com
www.theconnectedlawyer.com
Author's Mailing Address: Sims Law Firm, Ltd.
1700 Park St., Suite 206
Naperville, IL 60563
Author's Phone Number: 630-344-9267



Table of Contents

Contents

Table of Contents	5
Timed Agenda:	6
INTEGRATING AN IPAD INTO YOUR PRACTICE	7
A. Going Paperless	8
B. Joining the Cloud.....	8
a. Dropbox (www.dropbox.com)	10
b. SpiderOak (www.spideroak.com).....	10
c. Box (box.com)	10
d. NetDocuments (www.netdocuments.com)	11
e. ShareFile (www.sharefile.com).....	11
C. Apps any iPad-Ownning Lawyer Should Have.....	11
1. Legal Research Apps	12
2. PDF Apps	12
3. Office Apps.....	12
4. Note Taking Apps.....	13
5. Email, Calendaring & Contacts.....	14
6. Rulebook	14
7. Evernote.....	14
8. Checklist Again.....	15
9. To Do Lists.....	15
10. Lit Software	15
a. TranscriptPad	15
b. TrialPad	16
c. DocReviewPad.....	16
11. Apple TV: It's Not An App, But You Still Want One.....	16

Timed Agenda:

Time	Description
00:00:00	Program Start
00:00:22	Introduction
00:01:02	Integrating an iPad into your Practice
00:06:42	Going Paperless
00:08:16	Joining the Cloud
00:20:28	Apps any iPad-Owning Lawyer Should Have
00:21:20	Dropbox
00:24:34	Legal Research Apps
00:28:32	PDF Apps
00:32:27	Office Apps
00:39:40	Legal Specific Apps
00:53:42	Note Taking Apps
00:58:29	Additional Note Taking Apps
01:00:30	Email, Calendaring & Contacts
01:02:11	Rulebook
01:04:31	Evernote
01:06:05	Checklist Again
01:08:42	To Do Lists
01:15:03	Program End

INTEGRATING AN IPAD INTO YOUR PRACTICE

Many attorneys are now seeking to integrate tablets, in particular, iPads into their practice. This is no great surprise. They are light, fast, and powerful enough to give you access to your entire office with just a few taps of the finger.

In these materials, I discuss how to integrate an iPad into your legal practice. In the first section I discuss the integration between the cloud and the iPad. In the second section, I discuss some apps that are useful for just about any attorney.

Before addressing the substantive aspects of integrating an iPad into your practice, I first want to address the question of why an iPad instead of a different tablet, such as an android tablet. This is a legitimate question, especially considering the cost difference between an iPad (starting at \$400) versus something such as a Kindle Fire (starting at \$50) or the Galaxy Tab (starting at around \$150). Further, depending on the iPad chosen, the cost difference can be even greater.

Which tablet to get depends greatly on your anticipated use of the tablet. If you are going to use it only for reading email and reviewing documents, then an android tablet will likely work just fine for you. If, however, you want to leverage the power of the legal specific apps that are available, then you likely will want an iPad. You can see the difference in the apps available from two articles from the Lawyerist from last year. In July, Lawyerist published an article purporting to identify every legal app for the iPad (<https://lawyerist.com/74399/legal-apps-ios/>). A week later, Lawyerist published a companion article identifying all of the legal specific android apps (<https://lawyerist.com/74518/legal-apps-android/>). I have no doubt that both of these lists may have missed some apps, however, it gives you a good idea of the variety of apps available for each platform.

For my practice, I am firmly in the iPad camp. Some of the apps that I discuss below are available only on the iPad and I find them indispensable to my practice. For many of the non-legal specific apps, there are usually the same or similar app available for the android platform.

All of that being said, lets first turn to the first real principle that I believe attorneys need to incorporated into their practice before they can truly leverage the power of an iPad: Having a paperless office that is fully accessible via the Cloud.

A. Going Paperless

I don't actually like the term paperless. It is a misnomer, no law office is going to be completely without paper. Certainly there are things that you can do minimize the use of paper in your office. However, the purpose of a paperless office is not necessarily to rid your office of paper. Instead, the purpose is to make you not dependent on paper. Instead, your client file becomes a digital file. You no longer rely on the paper file. And, most importantly, having your file as a digital file means that you can access any document on any file in your office via your computer.

Once you are able to do that, by joining the cloud (see below) you can then access those same files (every document on every file in your office) from anywhere that you have internet access and from any device that you have (whether computer, tablet, or smartphone).

If your office is not already digital, then there is a process for getting there. It will take time, however, it is definitely a worthwhile process. In fact, I firmly believe that there is no one single thing that you can do that can improve the efficiency of your practice than moving to a digital practice. Given that this is a process, if you are not already digital, then the sooner you start the process, the sooner your office will be digital.

Once you are digital, then you can join the cloud.

B. Joining the Cloud

A few years ago the question facing many lawyers was whether the ethics rules allowed them to use cloud services in their practice. Today, that question has been answered in the affirmative. Although not every state has officially passed on this issue, those states that have, all approved the use of cloud services. For a summary of the cloud services ethics opinions, see the summary page provided by the ABA's Legal Technology Resource Center at <http://tinyurl.com/pmh5z2g>.

Now, the question facing attorneys is not whether to use the cloud, but instead, which cloud service to use. This becomes especially important when integrating an iPad into your practice. Although you can add documents to your iPad using iTunes, that is, by far, the most cumbersome method of adding documents to your iPad. The easiest way to add documents to your iPad is by using a cloud service.

One of the great strong suits of the iPad is its ability to integrate with various cloud services to allow you to access information on your iPad without having to download a bunch of information to your iPad.

If that information is information that you control, you will need to get it from paper to digital format. Once it is in a digital format, you can then use and distribute it in a variety of ways. One of the easiest ways to do this is to host your documents and other information in the cloud. If you use the phrase "cloud computing" in a group and you will get as many definitions as there are people in the room. Some describe cloud computing as delivering Software as a Service ("SaaS") wherein all users of that service or product access the same tools sharing a common interface and providing little or no customization capabilities. One example of this would be any of the free e-mail services such as Gmail, Hotmail, or Yahoo! Mail. Why you can generally change the appearance of move columns around every user shares very much the same interface with little ability to provide a significant customization to the service.

Others describe cloud computing as any service or product outside your firewall delivered across the Internet including traditional off-site or remote hosting of applications and data. An example of hosted services would be buying copy of exchange e-mail server but rather than installing it on a server in your office, you have a company in the Internet install it on one of their servers. You have full control over the features and settings in the product and share it with no one other than those in your office. Luckily, for the purposes of this materials, we do not need to draw these distinctions. Instead, the ultimate goal should be finding products or services that work for you.

Ideally, these products or services will allow you to access your tools and data anywhere you have an Internet connection. Solos and law firms are using these tools to connect all of their users and staff whether located in a single office or geographically dispersed locations.

With the legal profession becoming more and more mobile, the need to access documents on the go is necessary. Whether lawyers need to review files in court or during client meetings, the ability to pull up a client file on a laptop, tablet, or smartphone is not just convenient but a critical part of one's practice.

Cloud-based technologies allow this to occur. No longer do lawyers need to store mass amounts of data on an expensive on-site server that needs to be replaced every five years or so. Like any use of cloud-based technology, lawyers need to understand the security and storage capabilities of the provider before putting client files on a third-party server. Once the lawyer is comfortable with the provider, it provides many options for storing documents on the cloud.

Some cloud-based document management systems have existed for several years and have robust features to help organize information.

Others are created to be very simple. Even though the user is storing documents on a third-party server, systems, such as Box and Dropbox, allow the user to sync documents to a local computer. The following discusses several of the options for cloud-based document storage systems:

a. Dropbox (www.dropbox.com).

Dropbox is one of the more popular systems that lawyers use to save their documents online. Dropbox, which originally was a consumer grade product, has been integrated more and more into the business world. Despite some public hiccups on security, Dropbox maintains that documents are secure on their system. Dropbox can be used on a PC or Mac computer. It also has apps for the iPad, iPhone, Android and Blackberry. Documents sync locally to the user's hard drive. Dropbox also recently rolled out a Dropbox for Teams product that allows multiple licenses to be purchased for one account.

b. SpiderOak (www.spideroak.com).

SpiderOak is a competitor of Dropbox in that it provides a simple online storage system where you can store up to 2 GBs for free. Additional space can be purchased and synced to unlimited devices. SpiderOak has mobile device apps for iOS and Android systems. SpiderOak markets itself as the sole “zero-knowledge” data privacy product. In other words, data is encrypted on SpiderOak’s server and cannot be viewed by any SpiderOak employees. This puts the control of remembering passwords on the user to keep a true “zero-knowledge environment.”

c. Box (box.com).

Box has been in the cloud-based document storage arena since 2005. Box’s market is targeted to-wards enterprise use. While most of its features are available through a free account, more robust security and functionality is available for a monthly license fee. Box integrates with a growing number of online applications, such as Google Apps, EchoSign, Zoho, and Yammer. Documents can be synced locally, or the user can upload and download information through the web-based platform. Box allows tagging of documents to increase organization and has robust collaboration features.

d. NetDocuments (www.netdocuments.com).

NetDocuments is one of the leading online document management systems. In 2011, NetDocuments rolled out a new interface to increase functionality. NetDocuments is one of the more comprehensive platforms to store and work with documents online. If you are a Windows user, you can save documents directly from Office applications, including Outlook, straight into NetDocuments. NetDocuments also has collaboration features, and, like some of the other products such as Box, has the ability to monitor online status of documents and whether they are being edited.

e. ShareFile (www.sharefile.com).

ShareFile is a cloud-based document storage service that was developed by Citrix. In addition to the secure file storage and sharing, Like Dropbox, ShareFile allows you to sync your files with a local computer and to easily sync them with other members of your team. It also includes versioning and an FTP service that allows you to let others easily download documents you share with them or allow others to upload documents to share with you. Also, depending on the particular plan that you choose, ShareFile includes encrypted email with an Outlook plugin.

Dropbox, Box, and SpiderOak provides you with free space that you can use to test the service. I received a free trial to test ShareFile. All of the services provide a variety of plans at different price points. For example, with Dropbox, you can get 1TB of space for \$99 per year, with Box you can get unlimited storage for \$15 per month per user, with SpiderOak you can get 1TB of space for \$129 per year. NetDocuments is \$20 per user per month and ShareFile's plan with the encrypted email is \$1,200 per year, includes up to 5 users, and has unlimited storage.

The great thing about any of these services is that they have apps that work on your smartphone or tablet and allow you to download documents from the service or upload documents to it. With an appropriate cloud provider, you can access, via your iPad (or smartphone), any document on any file that you have stored electronically.

C. Apps any iPad-Owning Lawyer Should Have

Now you have an iPad and you can use it to access your documents when you are away from your office. So what? What else can you do? What apps can you integrate into your practice?

There are hundreds of thousands of apps in the App Store. Obviously not all are well-suited for a legal practice. However, there are several apps and several categories of apps that I have found useful in my practice.

1. Legal Research Apps

In my view there are three big players in this area. First up is **Fastcase**. The great thing about the Fastcase app is that it is free and it gives you access to their full database. Given that it is free, there is no reason not to have this app on your iPad.

Also available are apps from both Lexis and Westlaw. West offers a **WestlawNext** app. The app is free, but it requires a subscription to WestlawNext to make use of it. If, however, you have a subscription, you definitely should make this app part of your legal research toolbox. I have a WestlawNext subscription and I do a majority of my legal research from my iPad.

Lexis offers **Lexis Advance**. Again, the app is free, however, you will need a Lexis subscription to access the content.

2. PDF Apps

Having all of your documents available to you via the cloud does you no good if you cannot read them. There are a variety of apps that allow you to read, manage and annotate PDFs. My favorite of these is **iAnnotate PDF**. It costs \$9.99 and allows you to read and annotate PDFs. Other popular apps include **Adobe Reader** (free), **PDF Expert** (\$9.99), and **GoodReader** (\$4.99). GoodReader is probably the most popular of these, however, each of these apps has its fans and you may prefer one over the other. I tried a large number of them before I settled on my preferred one. I recommend that you read the reviews and try a couple before you pick your favorite.

3. Office Apps

For years, the popular apps in this category were **DocsToGo** (\$16.99) and **QuickOffice**. Both of these apps have been around on mobile platforms since PDAs first appeared. As of now, QuickOffice is essentially dead. However, DocsToGo is still around, if you are a fan of it.

I never used either of those apps with my iPad, however, I opted instead to use the solutions made by Apple: **Pages**, **Numbers**, and **Keynote**. These come free with iPads now. If you want or need to purchase them, they are priced at \$9.99 and they work flawlessly on the

iPad. Pages does not play nice with all of my formatting in my Word documents. However, I find its ease of use worth that difficulty.

Additionally, I find that I prefer using Keynote on the iPad works really well and offers an experience comparable to PowerPoint on a computer. If your plan to do any serious word processing, spreadsheeting, or presenting, I recommend that you explore these apps.

Now, however, you can finally have Microsoft Office on your iPad. For free you can download apps for Word, Excel, and PowerPoint. These apps allows you to review, and edit documents in each of these formats. If you have an Office 365 account, you gain additional functionality such as advanced change tracking features, no limits on the ways you can use paragraph styles, and advanced chart, table, and picture formatting tools. The first time that I used track changes on a Word document on an iPad I was amazed. Of course, never one to start with something simple, the first document I did this with had track changes from 2 other people in it before I opened it on my iPad and made my changes.

Regardless, if you use Microsoft Office in your office, you will want these apps for your iPad.

4. Note Taking Apps

One of the great things about the iPad is that it is very easy to take notes on. Add a stylus and a good app and you can ditch the legal pad and work with just your iPad. Further, if you have the iPad Pro and an Apple Pencil you had a device that was literally made for taking notes. My favorite note taking app is **Note Taker HD** (\$4.99). Other popular note taking apps are **Penultimate** (free), **Noteshelf** (\$8.99), **Bamboo Paper** (free), **Moleskine** (free), for those who want to try to replicated their Moleskine notebook. One great feature about Penultimate is that is now owned by Evernote, thus it seamlessly integrates with Evernote.

Another interesting note taking app is **WritePad** (\$4.99), which includes handwriting recognition software. Given my poor handwriting, I was impressed with the accuracy of WritePad.

One app that I find amazing is **Notability** (\$5.99). It allows you to make an audio recording and then it synchs that recording with notes that you take. This mean that you could record a deposition, take notes, and rehear the testimony simply by clicking on the notes. For \$6, that's a pretty good deal. I actually use this when I am conducting citations to discover assets. When I am done, if there is something important, I just send it to my court reporter to transcribe it.

Like the PDF apps, each of these operates slightly differently from the others. The one that works best for you will likely be a very personal

decision. I urge you to try a number of these, especially the free ones, to see which works best for you.

5. Email, Calendaring & Contacts

Most people use the apps that came with their device to handle their calendar, email, and contacts. That is fine, if it is working for you. However, that is not your only option. A significant new option is Outlook (free). This app is not build on the Outlook engine found on your computer. Instead, Microsoft bought a third party product, improved it, and rebranded it as Outlook. However, it works well. It handles your email, calendaring, and contacts, all in a single app. The only thing that I really don't like about this app is that, on my iPad, I can't get a monthly view of my calendar.

Other options for the iPad include Boxer (\$4.99) and Spark (free). These other apps usually offer features such as email snoozing that are not available in the app that comes with the iPad.

6. Rulebook

One of my favorite legal related apps is **Rulebook**. The app is free to download, however, you have to pay for the content that you want. The app allows you to purchase content from a number of different sources. For example, I have the Federal Rules relating to appellate procedure, bankruptcy, civil procedure, and evidence. Additionally, I have the Illinois Rules of Evidence as well as Articles I through III of the Supreme Court Rules as well as the Code of Civil Procedure. This means that I am carrying the full text of all of these books around with me at all times. This can be invaluable in court. In a recent trial I was participating in, I used Rulebook on my iPad to point out specific rules of evidence to the judge on multiple occasions.

The different rule sets vary in price. For example, the Bluebook is \$39.99, while most of the federal rules are \$1.99. I wish that Rulebook would strike licensing deals with other companies and offer a wider range of products. However, I am happy with the materials that they do offer.

7. Evernote

This is another app that is not legal specific, but it certainly gets used regularly by me. Evernote is a great service to store information that you want to access at a later time. The information is fully searchable. Further, if you can get the information into a digital format, you can likely

store it in Evernote. Plus, you can easily add information to Evernote from your iPad, smartphone, or computer. All, usually with just a couple of clicks of your mouse.

8. Checklist Again

Checklist Again (free) is designed to help you make sure that you perform all steps in a routine task. Whether it is your morning ritual or reviewing a real estate contract. You can set up your list in Checklist Again. Once you have completed it, you hit the reset button so that you can do it all again.

9. To Do Lists

Many of us search in vain for the perfect to do list apps. Fortunately there are a number that you can try. The app that I use is Trello (free). It allows you to organize your items by projects, boards, and cards. Priority Matrix is designed for those who use the Eisenhower box. The app is free, but there is a cost if you want to fully integrate it into your workflow. Those plans start at \$8.25 per month. Other popular choices include Any.do (free), Remember the Milk (free), Todoist (free), and Wunderlist (free).

A to do list is critical to keeping your workflow moving and working effectively. Keeping your to do list in an app on your iPad that allows you to refer to it or add items to it, regardless of where you are is invaluable.

10. Lit Software

Lit Software makes a suite of iPad apps specifically designed for the legal market. As a consequence, I have devoted an entire section of these materials to those apps. These apps are more expensive than most apps that you will purchase. On the other hand, they are a fraction of the cost of a piece of software on your computer. Further, the apps are very well designed and they perform functions that are sorely needed.

a. TranscriptPad

TranscriptPad is \$89.99. This is one of my favorite apps ever, it allows you to easily read a transcript, annotate it, highlight it, code it for issues, and create a report with that information.

In the past, I paid a couple of hundred dollars for a program on my computer that did this. TranscriptPad is a fraction of the price and works better and more easily than the computer software.

b. TrialPad

If you are going to be using an iPad at trial, mediation, hearing, arbitration, etc., you need to check out TrialPad. This app is not cheap (\$129.99), but it does the work of computer programs that cost thousands or tens of thousands of dollars.

Further, the app is extremely easy to use. It allows you to easily resize your documents, use a laser pointer, and create call outs. There is even a white board that allows you or a witness to easily draw pictures for display to the judge or jury.

c. DocReviewPad

DocReviewPad is the latest offering from Lit Software. It is designed to allow you to review documents, create production sets, and even Bates stamp your documents. The price on it is \$89.99. I have not yet had the opportunity to fully test all of the features of this app, however, it looks like another great app along the lines of TrialPad and TranscriptPad.

If you don't have any of these three apps and you want them, I urge you to check out the Ultimate Litigation Bundle in the App Store. It has all three apps for a reduced price of \$299.99 (as compared to the full price of \$309.97 when purchased individually).

Given the hundreds of thousands of apps that are available, there are quite likely many more apps that you could incorporate into your practice to make yourself more efficient. However, the apps identified above are a good place to start to integrate an iPad into your practice as a key component in your computing equipment.

11. Apple TV: It's Not An App, But You Still Want One

One last thing that I want to note is that once you start making use of your iPad, you will likely want to make more use of it. One of the best ways to do this is with an Apple TV (\$69 or \$149, depending on the generation). This device allows you to wireless display your iPad screen on a monitor or via a projector. Doing this allows you to easily use your iPad for presentations, trials, mediations, or even displaying information in your conference room.