

The iPad in Law Practice

One Lawyer's Story

By Scott Bassett

This month's column is part two of a three-part series focusing on integrating the iPad into a law practice. Part one of this series, "Practice Smarter, Not Harder, With These 50 iPad and iPhone Apps" (March 2012) introduced 50 useful apps for the legal professional. Part two details how iPad apps have been successfully integrated into one lawyer's practice. For those wanting to take their iPad usage to the next level, stay tuned for next month's part three, "Beyond the Basics."

—JoAnn Hathaway

Practice Management
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I am not an Apple fan. My skepticism about Apple products dates back to when my children were in high school. They were assigned MacBooks to use in class and at home. Having lived with DOS and then Windows for a couple of decades, I found the Mac operating system counterintuitive. I was frustrated that I didn't know enough about Apple's operating system to help my children with tech problems.

So I was shocked when, in the summer of 2011, I found myself longingly eyeing the iPads on display at my local Best Buy store.

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Buying Decision

My early-model Android tablet proved less than useful and I was looking for a replacement. I held my nose, took the plunge, and purchased the cheapest 16 GB Wi-Fi-only iPad 2 model for \$500. If you are buying your first iPad today, get the new third-generation iPad primarily for the higher-resolution screen that makes reading text easier. If you have an iPad 2, upgrading to the new iPad is more a luxury than a necessity for law practice use.

Wireless Connectivity

For a \$130 premium, you can buy an iPad with cellular data capability in addition to Wi-Fi. A monthly data plan is extra and ranges from \$15 to \$80 depending on the data cap selected, and there can be hefty overage charges. I am happy with my Wi-Fi-only iPad 2 because I find Wi-Fi available almost everywhere I go; if it isn't available, I tether my iPad to my cell phone's data connection via Wi-Fi. This can be cheaper than a separate iPad data plan and often allows for more data per month. If you have an original iPad or iPad 2 with anything other than a rare "grandfathered" unlimited data plan and you have a 4G smartphone capable of tethering, it makes sense to cancel your iPad's data service. Tethering to the much faster 4G phone service will greatly improve Internet speeds.

External Keyboard

Within hours of unboxing my iPad 2 in July 2011, I put my Android tablet and Kindle DX e-book reader for sale on eBay. The iPad experience was so good that I could not imagine going back to either of those devices. As summer became fall and fall became winter, I accumulated a collection of apps that let me use the iPad in my long-

distance Michigan appellate practice run from my home in Florida. One of the first things I realized was that I needed a decent, portable external keyboard to make full use of the iPad as a law practice tool. Fortunately, I had a folding Freedom Pro Bluetooth keyboard (\$99.99) I had purchased to use with my now departed Android tablet.

Although the Freedom Pro lacked function keys designed specifically for the iOS operating system, all the basic keys worked fine with the iPad. Its advantage over other standalone iPad keyboards such as Apple's own wireless model is that it folds to a very compact size and is easy to pack. For many users, an iPad case with built-in keyboard (also known as a folio) is a popular choice. Look for keyboard folios made by Adonit, Belkin, or Zagg. Unfortunately, a folio case adds bulk to the sleek iPad profile. I didn't want to make my iPad less portable 100 percent of the time just to carry a keyboard I might need 10 percent of the time.

Cover and Case

Since I opted not to buy a folio case, I needed a way to protect my iPad 2 from damage. I liked the functionality of Apple's folding Smart Cover, which protects the screen and serves as a multi-position stand for viewing or typing on the on-screen keyboard. The pricier (\$69) black leather Smart Cover offers the most professional appearance for use in court. Staying with the professionally understated theme, I added a satin black SwitchEasy CoverBuddy case designed to work with the Smart Cover. It protects the back of the iPad 2 while adding very little weight or thickness.

Stylus

For those times when keyboard input isn't needed or would be awkward, a capacitive

stylus is useful. I use several apps (described below) that let me handwrite notes directly on the iPad's screen and one that even converts my truly awful handwriting to text. My stylus of choice is the \$30 Wacom Bamboo because it has a narrow tip that makes writing on the iPad's screen more precise.

Apps

The built-in iPad apps work well for basic tasks such as e-mail and web browsing. Those will not be addressed here. Nor will this be a comprehensive review of the many law-practice-related iPad apps; for a look at dozens of useful apps, read JoAnn L. Hathaway's article in the March 2012 issue of the *Michigan Bar Journal*. Instead, I will focus on those apps and services that make the iPad useful in my practice.

Document Syncing

After buying my iPad, I realized I needed to get my practice documents onto the device before I could do anything with them. Toward that end, the first app I installed was SugarSync. I started using SugarSync's file synchronization service to keep my case and practice files in sync between my desktop and laptop computers several years ago. When I got my first Android phone and then tablet, I used the SugarSync Android app to access files when I was on the road. So it was logical that I would use the free SugarSync iPad app to synchronize client files to my iPad so I could read, annotate, and edit them when away from my desk.

Although SugarSync offers a free account that lets you sync up to 5 GB of data between devices, the client and practice files synchronized between my computers exceeds that limit, so I pay a modest \$4.99 a month for a 30 GB plan. If I were only syncing current files to my iPad as needed, the free account would be more than adequate. Other popular file synchronization services with apps for the iPad include Dropbox, Box.net, and SpiderOak, which tout advanced security features of particular interest to lawyers. As with any cloud-based service where your data or documents are stored away from your office on someone else's servers, read their privacy policies to be sure you are comfortable with entrusting your data to them.

Working with Documents

Once your client-related documents are on your iPad, you need an office suite application to view and edit them. Again, I relied on an old friend—in this case, Documents to Go Premium (\$16.99) by Dataviz. I've used Documents to Go since I was a Palm Pilot user in the 1990s. It works directly with SugarSync and most other file synchronization services to sync my client and firm files to and from my iPad. The app allows me to open, edit, and create Word documents, Excel spreadsheets, and PowerPoint presentations. I can also view PDF documents, but as will be explained below, there are better apps for working with PDFs. Other highly rated iPad office suites include Apple's own iWork (\$9.99 each for Pages, Numbers, and Keynote) and Quickoffice Pro HD (\$19.99).

None of these iPad office suites offer full MS Word functionality such as extended formatting tools or track changes, but they work well for all but the most complex documents. If you need more, two apps/services that emerged early this year offer access to a full version of MS Office 2010 from an iPad—so long as you have a decent Internet connection (Wi-Fi or 4G). CloudOn (currently free) works with files you sync to a Dropbox account and gives you a virtual workspace with the full version of MS Office 2010 and all its features.

OnLive Desktop (free and paid subscriptions) takes the next step and lets you run a virtual session of Windows 7 on the iPad. Within that Windows 7 desktop, you have access to the full MS Office 2010 suite in the free version and also Internet Explorer (with Flash) and priority server access in the \$4.99 a month Plus version. It is very speedy—almost like running an app locally instead of in the cloud. I like OnLive Desktop so much for working with complex Word and PowerPoint documents that Documents to Go can't handle that I signed up for the Plus account. The downside is that OnLive Desktop doesn't work with file sync services such as Dropbox or SugarSync. You first need to upload the files you want to work with from your PC or Mac to your OnLive file storage area. Your documents reside in the cloud with both of these services, so read their privacy policies before use.

Working with PDFs

As nice as it is to be able to view and edit Word files on my iPad, I find that the documents I most need to work with in my practice are in Adobe's PDF format. Like MS Office files, I sync PDFs to my iPad using SugarSync. This includes appellate briefs received through the Court of Appeals' e-filing service, briefs and transcripts received on paper and scanned to searchable

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PDF using my ScanSnap scanner, or documents received via e-mail attachment from clients or opposing counsel. A solid majority of the files in my client folders are PDFs, not Word documents.

Although the iPad has a native PDF viewer, it does nothing more than let you open files. I need to annotate the PDFs I work with, which usually includes highlighting key text and adding comments. I purchased several apps for this purpose including iAnnotate PDF (\$9.99), Notability (\$0.99), and GoodReader (\$4.99). All three work very well, and my favorite varies depending on which app was most recently updated with improvements in performance and user interface.

Currently, GoodReader seems to be the speediest but I prefer Notability's user interface. iAnnotate PDF is the most customizable and offers the most features. You can't go wrong with any of the three. For me, these are the apps that make the iPad such a useful law practice tool. In my appellate practice, I have not read and annotated a brief or transcript on any device other than my iPad since purchasing these apps.

Remote Access

If I'm on the road and need to run software for which there is no iPad equivalent, I can remotely access and control my desktop computer from an iPad as long as both are connected to the Internet. In this way, I can access my practice management, time/billing/accounting, and practice-specific applications (such as child-support calculators) from anywhere.

Once more, I turned to a familiar service, LogMeIn, which I used for years to access my desktop computer from my laptop while traveling. I purchased the iPad version called Ignition for about \$30 soon after buying my iPad 2. Unfortunately, Ignition is now very expensive (\$99.99). There is a free version of LogMeIn for the iPad that handles basic remote control for running apps but omits more advanced file management functions found in Ignition and other paid apps. Full-featured remote access and control apps that cost less than Ignition in-

clude Splashtop Remote Desktop (\$19.99) and GoToMyPC (free iPad app, but a monthly subscription of \$9.95 is required to remotely access one computer).

Taking Notes

The iPad is also a great note-taking tool when interviewing clients, taking depositions, or attending meetings and seminars. I've collected many note-taking apps, all of which have something to offer. They include the previously mentioned Notability, along with Auditorium (\$5.99), Noteshell (\$5.99), PaperPort Notes (free), and 7notes HD Premium (\$8.99).

MCR 2.306(C)(2)(b) allows a party to make a non-secret audio recording of a deposition. The iPad's built-in microphone does a decent job of recording meetings, lectures, and depositions. If you need a better microphone, the Camera Connection Kit (\$29) from Apple provides a USB port into which you can plug a variety of high-quality external USB microphones such as the Samson Meteor (\$70). Notability lets me record audio while taking either handwritten notes with a stylus or typed notes with the on-screen or external keyboard. Auditorium records audio, but note-taking is on-screen or external keyboard only. Notes can be keyed to particular portions of audio testimony. With Auditorium, I must manually insert bookmarks linking notes to a specific portion of the audio recording. Notability automatically syncs the notes to the recording. I can tap on a word in my notes to hear what was said at the moment that note was taken. With either program, it is simple to export the .mp3 format audio recording (minus written or typed notes) to satisfy the court-rule requirement of providing a copy of the audio to other parties upon request.

The most unusual note-taking app is 7notes HD Premium. It has a handwriting input area at the bottom of the iPad screen. Write in that area and the recognized text will appear above the input area. This app recognizes my handwriting reasonably well; a good stylus such as the Wacom Bamboo improves recognition accuracy. The recog-

nized text can be e-mailed as plain text or a PDF document. There are settings in which pecking away at a keyboard is distracting or impolite, such as an initial client interview. If I want a text document instead of handwritten notes but don't want to use a keyboard, 7notes HD Premium is one of the few apps that will handle the job.

Legal Research

I still do the bulk of my legal research on my laptop computer with external monitors on either side of the built-in screen. That way, I can have opposing counsel's brief and the trial transcript (both annotated on the iPad and synchronized back to my laptop) open on the two external screens and my research database open in a web browser on the main laptop screen. But when I need to do legal research away from my desk, there are several iPad app choices. With a paid Westlaw or Lexis subscription, the free WestlawNext and Lexis Advance iPad apps are a joy to use. They work much like a Google search by letting you input almost anything into the search window. The formatting requirements (and undoubtedly some of the precision) of the old-style Boolean searches are gone.

Conclusion

Existing Android tablets and the future Windows 8 tablet will have better specs and more impressive hardware than the iPad. But they don't yet, and perhaps never will, have the ecosystem of useful apps that make the iPad a great law practice tool. Even with the cost of accessories and apps added to the basic \$500 cost of the cheapest iPad, it remains a bargain for the productivity gains it provides. ■



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