

The Basics of the Lawyer's iPad

By Jim Calloway

The iPad has proven very popular with the legal profession. Some lawyers are quite proficient at using their iPads with numerous apps installed and a proclivity to show off their latest app to anyone who will stand still and watch. Others mainly use the iPad for entertainment, browsing the Internet or responding to email. The editor of this legal technology-themed issue of the bar journal is Sandee Coogan. She asked me for a “beginner’s” article on how lawyers can use their iPad.

The iPad is the king of tablet devices, but not the only game in town. Droid tablets, like the Google Nexus, the Asus Transformer Pad and the Samsung Galaxy Note are greatly improved in features and gaining in popularity. Microsoft’s Surface tablet was launched late last year to decidedly mixed reviews, accompanied by a flood of snappy TV commercials. I have had no time with the Surface and limited time with Droid tablets. The ability to use a full version of Microsoft Word on the Surface is a plus. But, for most of us, the huge number of apps, particularly lawyer-specific apps makes the iPad much more appealing for lawyers. For the Droid side of the story, you can stop by the Droid Lawyer™ blog (www.thedroidlawyer.com). And, while the Surface could be the dominant force in mobile computing in a few years, it is certainly not there with the first edition.

WHY AN IPAD?

The iPad is elegantly designed and easy to use. The iPad has become popular because it is a simple computer that turns on instantly and can be operated with your fingertips. While a laptop computer can be effectively used at counsel’s table during a trial, laptops do not work well for motion dockets or many other types of hearings where a lot of lawyers are milling around in the

courtroom well. The iPad works very well in these situations. And if a judge calls you up to the bench to schedule a hearing, “instant on” is very important too.

WHICH IPAD?

When purchasing an iPad, one looks at three variables. First is the type of iPad. The options are iPad 2, iPad Mini and iPad with Retina display. (The iPad 1 is no longer recommended.) Next is the size of storage on the iPad. The 16 GB model will likely be fine if you only intend to use it for work and won’t be storing much in the way of music, photos and videos on the iPad. Others will opt for 32 GB or 64 GB. Finally you have to decide whether to spend an additional \$129 for a Wi-Fi plus cellular data model that supports 3G and 4G LTE on AT&T, Sprint or Verizon. Some purchasers keep their options open by buying the cellular model, but not setting up the monthly paid data plan until they are sure they will need it.

Your budget will drive your final iPad purchasing decision. One can purchase a 16 GB iPad 2 Wi-Fi only for \$399 and refurbished ones for even less. The top end model, the 64 GB iPad with Retina Display and Wi-Fi plus cellular data costs \$829 plus a monthly fee for the data plan.

The iPad Mini is very popular, less expensive and convenient to carry. A full-size iPad might be a better choice for the first iPad, but that is a personal decision. Veteran iPad users are beginning to report using the iPad Mini more frequently than the originals.

NOW WHAT DO I DO WITH MY IPAD?

First you have to download and install iTunes on a computer. Then you plug in your new iPad and follow the instructions to set it up. You will want to set up your email and calendar to synchronize with your primary email and calendar.

Then you want to protect your iPad and your information.

IPAD SECURITY

It is important to make sure any i-Device is properly secured, especially if you intend to use it for client work. The smaller the device, the easier it is to lose or have someone steal it, so taking some basic precautions is important.

- Adequate Passwords – go to **Settings>General>Passcode Lock>Require Passcode** and turn it on. We recommend turning off the option for **Simple Passcode**, and having a longer, more secure passcode.

- Consider using a password storage program to save your passwords. We recommend both **LastPass** (www.lastpass.com) and **1Password** (<https://agilebits.com/onepassword>) – both of them work on any browser as well as your iPad or iPhone. They securely store all of the passwords you use on websites, and will also help generate long, secure, unbreakable passwords for you.

- Auto-Lock – within **Settings>General**, make sure you set your iPad to automatically lock after a certain period of time. Never set it to Never.

- Make sure the **Erase Data** is set to ON, so data from the device is erased after 10 failed passcode attempts

- Download the **Find My iPhone** app (it works on the iPad, too) – it is an invaluable tool for both locating a lost or stolen iPad, as well as wiping it or locking it remotely once found.

- Backup – make sure you routinely backup your devices, so you don't lose sensitive information. You can backup the old-fashioned way using iTunes, or backup wirelessly to an iCloud account, which will likely be the preferred method.

LEARNING ABOUT THE IPAD

Step-by-step instructions to do every little thing with the iPad or apps would seriously bloat this article and make it unreadable. Apple has lots of online help available at www.apple.com/support, but I rarely use that resource. It always seems easier just to type whatever question I have into Google and locate an article on how to do something written by a blogger or professional reviewer.

Several websites provide information for lawyers who use iPads. These include Tom Mighell's blog iPad 4 Lawyers (<http://ipad4lawyers.squarespace.com>), Jeff Richardson's iPhoneJD (www.iphonejd.com), which includes many detailed reviews of apps and Brett Burney's Macs in Law (www.macsinlaw.com).

ABOUT ALL THOSE APPS

There are more than 1 million apps in Apple's App Store and 200,000 alone for the iPad. I'll highlight some "must have" apps here. But bear a few things in mind. Apps are relatively inexpensive, but the time invested in learning how to use them is not. There are often a dozen apps that accomplish the same things. Spend some time reviewing legal app blogs and consumer reviews. Ask trusted people about what they recommend. Your workplace may prefer one app over another. Consistency/uniformity at the office typically is a good thing. If your co-workers or friends use an app, they can provide you with a "support network" to better learn and use the app.

If you want to see even more apps that are useful for lawyers, check out Tom Mighell's book *iPad Apps in One Hour for Lawyers* (www.okbar.org/s/5fce4 at the ABA Bookstore).



DEALING WITH DOCUMENTS ON THE IPAD

The most common initial question is “how do I get documents on the iPad?” Although you can use iTunes to do this, that is not normally your best choice. Generally you will either email documents to yourself or using a cloud-based file sharing or file synchronization service like Dropbox or SpiderOak. (For more on cloud computing, your attention is directed to “Conquering Cloud Computing: Tips for Online File Storage” 83 *Oklahoma Bar Journal* 2697, Dec. 8, 2012.)

One of the nice things about iPhones and iPads is that you can open and read most email attachments with the built-in viewer. But the viewer tool, while handy, does not let you edit the attachments or even save them to your iPad.

There many great iPad apps to work with documents.

Because PDF files are so ubiquitous for lawyers, an initial “must have” app for lawyers is **GoodReader**, available for iPhone and iPad. (\$4.99, www.okbar.org/s/goodreader). It provides excellent annotation tools for PDF files, including the ability to highlight text, insert text boxes, post “sticky notes” comments, compose freehand drawings, lines, arrows, rectangles, etc. These tools are extremely useful when you are reading a court opinion or law review article. GoodReader also has a robust file manager and has the ability to sync directly with your accounts from Dropbox, Box.net, Google Docs, and many other similar services. GoodReader also works with Microsoft Office files and other document formats.

If you want to use an iPad for annotation, then you will probably want to purchase a stylus. Annotation with a finger doesn’t really work all that well. Three popular styli are the AdonitJotPro (\$29.95), Kensington Virtuoso (\$25 with included pen or \$15 without pen) and Wacom Bamboo (\$29.95).

PDF Expert (\$9.99, www.okbar.org/s/pdfexpert) is similar to GoodReader. But PDF Expert offers a few additional features that are hard to find in other apps and that appeal to legal professionals. PDF Expert supports PDF

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forms and allows you to fill-in PDF forms via text fields, check boxes, radio buttons and other form elements. You can create a PDF form on your computer and transfer it over to your iPad when you need to complete the form away from the office.

If you want to draft and edit documents, there are a handful of “office suites” for the iPad

that can perform the core features found in Microsoft Office on your computer. One of the top choices for legal professionals is **Quickoffice Pro HD** (iPhone/iPad) which allows you to view and edit Microsoft Word (Quickword), Excel (Quicksheet), and PowerPoint files (Quickpoint). (\$19.99, www.okbar.org/s/yhk6a).

Another very popular app to work with Microsoft Office files is **DocumentsToGo Premium** (\$16.99, www.okbar.org/s/xt9z8). This app has been around for a long time and is in wide usage. Tom Mighell has worked extensively with both and gives the edge to QuickOffice Pro, but either will serve you well. Quickoffice does not handle footnotes while DocumentsToGo does, if that is an important consideration for you.

If you are still using WordPerfect, you will not find a tool to edit those documents on the iPad. But the **WordPerfect Viewer for the iPad** (\$5.99, Corel Corporation www.okbar.org/s/ohzmj) will allow you to open, view and search through WordPerfect documents.

NOTE TAKING

Note taking is another handy function that could let you use the iPad like you use a traditional legal pad.

Notability (99 cents, www.okbar.org/s/d5u5h) is also a “must have” tool at a bargain price. Very few note-taking apps perform all three recording functions with handwriting, typing and audio recording. Just imagine how handy it is to be able to turn on the audio recording feature when you realize that you are falling behind on your note taking during an important meeting.

Noteshelf (\$4.99, www.okbar.org/s/j4n90) Noteshelf is a great way to take notes and keep them organized. You can organize various

notebooks on subjects and projects as you desire. The various notebooks are displayed on shelves when not in use like they are displayed in iBooks or other ebook apps. This gives you the advantage of not only taking notes, but making certain you will know where they are when you need them.

BLUETOOTH KEYBOARDS

While touch typing directly on the iPad is fine for doing Internet searches or briefly answering email, if you really want to edit and prepare documents on the iPad, you will want a Bluetooth keyboard. Bluetooth is the wireless method that keyboards use to connect to the iPad since there is no place to plug them in. You can use the standard Apple keyboard, but that combination doesn't make a handy travel package. Most lawyers purchase a combination keyboard and iPad cover like the ZaggFolio, the Brookstone iPad Keyboard case or Logitech Ultrathin Keyboard Cover.

If you want to learn what several experts have recommended for iPad Bluetooth keyboards, see "Revisiting the iPad Keyboard Problem," www.attorneyatwork.com/revisiting-the-ipad-keyboard-problem. I have embraced the Logitech Ultrathin Keyboard Cover.

DOCUMENT SCANNING

Like smartphones, the iPad also contains a camera. While the iPad is a bit awkward to use to take snapshots, we should not forget that with the right app, this can be a great tool to scan documents. Several apps will convert pictures to PDF files and resolution of the iPad is such that you can take a picture of an 8.5" x 11" document for scanning. Lighting can be a problem when trying to take a picture of a full-sized document.

On the inexpensive side you can get an app like JotNot Scanner Pro (99 cents, www.okbar.org/s/d25g9) to do this, but if you are going to do this often you may appreciate the expanded features of Scanner Pro by Readdle (\$6.99, www.okbar.org/s/kxk9w), especially for multiple pages.

LEGAL RESEARCH

Your legal research provider has an app for legal research.

LexisNexis® has several apps including Lexis Advance™ and CourtLink®. More informa-

tion is online at www.lexisnexis.com/en-us/products/mobile.page. You can learn about the WestlawNext iPad app at www.store.westlaw.com/westlawnext/mobile-ipad/ipad-app/default.aspx.

Fastcase, your Oklahoma Bar Association-supplied legal research tool also has an iPad app at www.fastcase.com/ipad. Here are the instructions for synchronizing your iPad Fastcase account with the access you enjoy by computer, if you have not already done so:

For users who login through their bar association, law school or law firm landing page, simply login to your account, scroll over to the Options menu and select Mobile Sync. Once on the Mobile Sync page, you will be prompted to enter an email address. This will be your username for logging in using the mobile app (Tip: If you already use Fastcase for the iPhone or Fastcase for the iPad or Fastcase for Android and are syncing your accounts, please use the email address associated with your pre-existing app account.) When you've entered your email address, click Go. We will send an email to this address to confirm that you own it. The email will contain a link that you must click to complete the sync process. If you have already established a mobile app account, simply click the link in the email, and your two accounts will automatically link together.

If you might like reading news from various sources in a magazine-style format, you might try the free Flipboard app, www.okbar.org/s/rga-d. It will also handle Twitter and Facebook. It is hard to describe how well this app works, so please just give it a try.

There are many apps that a lawyer can use at trial. But that is really an entirely new article. I hear rumors that trial apps might even be a new book from Tom Mighell. But as I have noted in the bar journal several times before, you really cannot go wrong by starting with apps like TrialPad and TranscriptPad from Lit Software, www.litsoftware.com.

If you want some training on iPad basics, you can view Getting Started with iPad2 on our OBA MAP YouTube page, www.okbar.org/s/6w9uk, and Ten iPad Typing Tips at www.luigibenetton.com/2012/12/typing-on-an-ipad/

If you want to learn about even more apps, here are the ones highlighted at ABA TECHSHOW 2012's 60 Apps in 60 Minutes presentation, www.okbar.org/s/b8tio.

You can use an iPad in so many ways. In my article "Unexpected Uses of Tools and Unintended Consequences," 83 *Oklahoma Bar Journal* 2414, Nov. 3, 2012, I outlined how you can make great movies with the iPad. But I hope this article gives you a great start on using your iPad.

Author's note: This article is drawn in part from materials for CLE webinars that I have co-presented with Tom Mighell. Mr. Mighell is senior consultant for Contoural Inc. and author of "iPad in One Hour for Lawyers" and "iPad Apps in One Hour for Lawyers," both published by the American Bar Association. The word "we" is used in places to reflect our joint recommendation.

ABOUT THE AUTHOR



Jim Calloway is the director of the OBA Management Assistance Program and manages the OBA Solo & Small Firm Conference. He served as the chair of the 2005 ABA TECHSHOW board. His Law Practice Tips blog and Digital Edge podcast cover technology and management issues. He speaks frequently on law office management, legal technology, ethics and business operations.

At the end of the day...

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Who's Watching Your Firm's 401(k)?



The American Bar Association Members/Northern Trust Collective Trust (the "Collective Trust") has filed a registration statement (including the prospectus therein (the "Prospectus")) with the Securities and Exchange Commission for the offering of Units representing pro rata beneficial interests in the collective investment funds established under the Collective Trust. The Collective Trust is a retirement program sponsored by the ABA Retirement Funds in which lawyers and law firms who are members or associates of the American Bar Association, most state and local bar associations and their employees and associates of certain organizations related to the practice of law are eligible to participate. Copies of the Prospectus may be obtained by calling (866) 812-1510, by visiting the website of the ABA Retirement Funds Program at www.abaretirement.com or by writing to ABA Retirement Funds, P.O. Box 5142, Boston, MA 02208-5142. This communication shall not constitute an offer to sell or the solicitation of an offer to buy, or a request of the recipient to indicate an interest in, Units of the Collective Trust, and is not a recommendation with respect to any of the collective investment funds established under the Collective Trust. Nor shall there be any sale of the Units of the Collective Trust in any state or other jurisdiction in which such offer, solicitation or sale would be unlawful prior to the registration or qualification under the securities laws of any such state or other jurisdiction. The Program is available through the Oklahoma Bar Association as a member benefit. However, this does not constitute an offer to purchase, and is in no way a recommendation with respect to, any security that is available through the Program.

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