

iPad for Lawyers

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Jennifer Ellis

Faculty Biography

Jennifer Ellis is an attorney with the Philadelphia personal injury firm of Lowenthal & Abrams, where she assists the other attorneys with issues involving social media and the Internet. She also handles the firm's online presence. In addition, Jennifer is a law practice management consultant. She helps law firms with their websites, social media and online marketing. Jennifer also assists firms identify their technology needs.

Involved in the American and Pennsylvania Bar Associations, Jennifer serves on both the Diversity and Publications committees of the ABA's Law Practice Management Division and is Secretary to both the Solo and Small Firm Practice Section and the GLBT Rights Committee of the PBA. Jennifer is a nationally recognized author and speaker. Her upcoming book on creating WordPress based websites for law firms will be published in early 2014. Find Jennifer online at www.jlellis.net, www.lowenthalabrams.com or at jle_jd on Twitter.

iPad for Lawyers

Jennifer Ellis

The iPad has become a very useful device for lawyers. Whether in the office, on the road or in the court room, an iPad, loaded with the proper applications, can be quite helpful in legal practice.

These materials and the accompanying seminar cannot possibly discuss every single useful app; there are simply too many apps available. The goal is to give you a sense of apps you can use in your practice.

iPad and Security

I would be remiss if I failed to discuss the ethical and security risks surrounding your iPad. If you lose your iPad, you have most likely placed a considerable amount of confidential information in the hands of whoever found it (or stole it.) It is important that you set up your iPad so it can be remotely wiped. In addition, you should use a security code so that if someone tries to use your iPad, he won't be able to easily do so.

Passcode

If you did not set up a code for your iPad, please do so now. The steps are as follows:

1. Access the Settings app
2. Touch General
3. Choose Passcode Lock
4. Turn it on
5. Pick your code
6. Return to General
7. Select Auto-Lock
8. Pick the amount of time after which your iPad will lock

Do not use an obvious password, such as 1234. People will guess that one first. If you forget your password you will have to set up your iPad as a new device. So please keep this in mind.

If you are so inclined, you can choose the Erase Data option. This feature will wipe your iPad clean after 10 unsuccessful attempts. 10 attempts is a lot, so it might be worth it for you to

activate this if you have a lot of very confidential data on your device. As long as you consistently backup your iPad, it won't be a big deal to restore your backup.

Find your iPad

You should activate the Find Your iPad feature. This way, if your iPad is lost or stolen, you can try to locate it. If you cannot get your iPad back, you can remotely wipe it using this feature. You have to activate this feature *before* you lose your iPad. Otherwise it is useless.

1. Get the Find My iPhone App through the app store.
 - a. <https://itunes.apple.com/us/app/find-my-iphone/id376101648?mt=8>
2. Run it and you will be walked through the set up.

You will need to enable the ability for your iPad to track its location. If you turn this off and you lose your iPad, you will be out of luck. When you first install the app, it will tell you if location is turned off and that you need to turn it on. Do so.

If you lose your iPad, you can set a warning that it has been lost (put it in lost mode) or wipe it. The changes will take effect next time your iPad is connected to the Internet. Once you wipe your iPad, you can no longer locate it, but you can set up a message with your contact information. Details on what to do after you lose your iPad can be found on Apple's website. <http://support.apple.com/kb/ht5668>

iCloud and Backup

iCloud is included with your iPad, along with a certain amount of space that may or may not meet your needs. You can purchase more space if you require. You can also backup your iPad by plugging it into your computer and choosing the backup option. I recommend you do both. iCloud includes a desktop application, you can install that as well.

iCloud set up is as follows:

1. Make sure your operating system is up to date.
 - a. Settings
 - b. General
 - c. Software Update
 - d. If there is an update you will be provided with the opportunity to set download and install it.
 - i. <http://support.apple.com/kb/ht4623> for more help.
2. Turn on iCloud, if you skipped this step when you setup your iPad
 - a. Settings
 - b. iCloud – follow the directions, which include entering your Apple ID

- i. More about your Apple ID <http://support.apple.com/kb/HT4895>
3. Make certain that you set up iCloud to actually backup (and not just sync) your iPad.
 - a. Settings
 - b. iCloud
 - c. Storage & Backup
 - d. Switch iCloud Backup to On

Please note that iCloud does not backup your music or movies.

Additional Backup Apps

There are third party apps that you can use to backup your iPad. These range in cost from about \$18 to about \$25. I cannot recommend one in particular, because I do not use any of them. One reason I do not feel the need to use any additional backup is that I keep my important documents and information in the cloud. Such information cannot be accessed through my iPad without the password, so adds an additional layer of security and external backup. I will discuss cloud options later in this document.

Syncing versus Backup

Remember, syncing is not the same as backing something up. If you are simply syncing, and you delete something on your iPad, whatever you are syncing will be deleted everywhere else. As a result, if you delete something by accident, it will be gone everywhere. On the other hand, a backup is essentially a picture of what your device looked like at a certain time, like a snapshot frozen in history on a certain date and time. This is why you must back everything up in addition to syncing items such as email and documents through other methods.

Apps for Law Practice

Access the app store through the app store icon on your iPad, or via iTunes on your computer.

If you want to install an app from your iPad, begin by clicking on the app store. Then search for your app. Next, touch the price (if it is free, it will show free) then click on install app. In some locations you will see a cloud with a down arrow. Click on this to download the app.

Pre-Installed Apps

Right out of the box, the iPad contains apps that are quite useful. They include:

1. Email
2. Calendar
3. Tasks
4. Notes

If you sync each of these apps to your desktop, laptop or email, you will be able to work with these features no matter where you are located. The set up will vary based on your email.

Setting up your Email

The process always begins the same way.

1. Access Settings
2. Choose Mail, Contacts Calendars
3. Choose Add Account
4. Select the appropriate Email Provider
 - a. Apple has automatic settings for the most common providers.
 - b. If you do not see your email provider, choose Other and Add Mail Account
5. Follow the on screen steps to set up your account.
 - a. If you are not sure of the settings, you will need to check with your email provider. Normally a search on Google for the name of your provider, email and iPad will work. The search will look something like *“setup Verizon email on iPad”*

You will need your email address and password from your email account to set up your email. Have that available before you get started. For more information on setting up email, access Apple’s website <http://support.apple.com/kb/ht4810>

As you go through the process, you will be offered the opportunity to choose what will be synced; i.e. your email, contacts and calendars. You can set up a number of email accounts by going through the process for each one. When you look at your email, you can look at one account at a time, or all of the accounts.

Syncing Notes

If you run into problems syncing your notes, you can find solution to common problems on Apple's website. http://support.apple.com/kb/HT4191?viewlocale=en_US

These apps work pretty much the same way they do on your computer or phone and should be relatively self-explanatory. If you are not currently using notes, tasks or calendars, I strongly recommend you familiarize yourself with whatever email service or program you are using, and start using them to help with your organization.

Reading

Whether for pleasure or work, the iPad is built for reading and annotating. There are numerous apps that can help you with this process. Some of the apps include:

iBooks – Included with iPad

Basic reading app. Convenient place to store many books and pdfs.

Amazon Kindle – Free

In addition to enabling you to easily download and read books from Amazon, the Kindle app allows for annotation of documents that can be viewed via the application. If you are reading a book from a bar association, for example, that was purchased on Amazon, you can easily take notes and sync them through any device with the Kindle app.

PDFExpert - \$9.99

This app allows you to work with pdfs and do such things as annotate, highlight, make notes, draw and save. The changes are compatible with Adobe Acrobat for use on your computer. Documents.

iAnnotate PDF - \$9.99

Read, mark up and share pdfs, docs or ppt.

EzPDF Reader \$3.99

Another popular PDF reader. Allows annotations and viewing of multimedia items in pdfs.

Adobe Reader – Free

Just like the reader you use on your computer. If you do not need to be able to do anything other than read pds, this app works well.

SignMyPad - \$3.99

Allows you to sign a pdf.

Document Creation

Office 365 with Office Mobile – Annual Fee \$99-\$150

Office 365 is an annual subscription service that includes the full Office 2013 suite. The more expensive version includes cloud based Exchange email. The application itself is free and includes a simplified version of Word, Powerpoint and Excel. You can work on a document on your computer, open it on your iPad and edit it, then move to a different computer and work on it there. This is the most seamless way to work with the Office suite on your iPad.

Documents to Go - \$9.99-\$16.99

The premium version allows for editing of Word, Excel and Powerpoint files. It also allows syncing with tools such as iCloud, Google Drive and Drop Box. It includes a pdf viewer as well. A free desktop app allows you to work with the documents on your computer.

Keynote - \$9.99

Apple version of powerpoint. Very effective if you use a Mac instead of a PC in your office. Claims to work well with Powerpoint as well, but I cannot offer any experience with this.

Note Taking

In addition to the document creation apps noted previously, there are a number of apps made specifically for note taking.

Notes Plus - \$9.99

Allows note taking by typing, writing with an iPad compatible stylus, audio recording and more.

Penultimate – Free – Works with Evernote

Focuses on the ability to write notes with a stylus. Evernote is an organizational app that allow the user to save information within his account. It has a monthly fee.

Dragon Dictation – Free

Simple and popular dictation app.

Organization

Evernote - \$5-\$45 per month

Very popular organizational tool. Connect relevant documents, pictures and tasks together. Sync to the cloud.

Circus Ponies Notebook - \$29.99

Works with macs and syncs wirelessly between a Mac and your iPad. Helps you organize yourself by putting appropriate pieces of information together.

Document and Image Syncing

In addition to iCloud, there are a number of apps you can use to sync files such as documents and pictures across the cloud and to your computers, phones and iPads. These include Dropbox and Spideroak. The apps are free and a certain amount of space is free. Beyond that you must pay a monthly or annual fee. Normally about \$10 per month for 100 gigs. Dropbox does not have native encryption, so it must be added separately. Skydrive is the Microsoft option. Skydrive also requires additional encryption. There are many options for encryption for Dropbox and Skydrive.

Research

The iPad is a wonderful research tool. Virtually anything you need can be found through one app or another. Keep in mind, most of these tools require Internet access, so it is never a bad idea to keep a pdf of the local rules or other important documents on the iPad itself.

Westlaw and Lexis both have apps that can be used with your subscription.

Fastcase is a free app that is excellent for looking up cases.

Docket in Your Pocket (PA) - \$14.99, "provides access to Pennsylvania court records, including criminal charges, lawsuit filings, civil judgments, traffic."

AllLaw – Pay for Specific Content

AllLaw provides access to many codes and cases. You must pay for specific content. For example, the Pennsylvania code is \$5.99. All content may be purchased for \$99.99.

Black's Law Dictionary - \$54.99

Litigation Tools

Trial Director – Free

Works with the full Trial Director program, but can also be used separately. Allows you to show exhibits via your iPad. Includes the ability to write on and save the documents and pictures you are working with.

TrialPad - \$89.99

Very popular trial presentation application.

TranscriptPad - \$89.99

Use for transcript review on your iPad. Excellent for presentation of transcripts as well.

Juror Tracking Apps

There are a number of juror tracking apps that have received good reviews. I have not had occasion to use any of them. They include:

iJuror – The full version is not currently available on the app store. However a free version is available right now.

Jury Tracker - \$4.99

A simple app written by a trial consultant. Provides easy tracking of jurors with emoticons to represent your thoughts about each juror.

Jury Duty - \$39.99

Provides more options than Jury Tracker. Includes a seating chart as well as a location to for detailed notes.

Calendars

iPad Calendar

The iPad calendar works very well and syncs with Exchange, Google and other calendars. I have not found the need to replace it with another app.

Smart Dockets – Free

Use to calculate dates and deadlines using court rules. Helps you calculate the information on your iPad. Once you complete the calculation you can email it as a report or calendar appointment.

Case Management

Both Clio and RocketMatter provide excellent options for cloud based case management. They also work well on the iPad. The fees vary per service and number of seats.

Time Keeping

Clio and RocketMatter offer timers, but there are many additional timers available for the iPad. I find that different styles fit different people, so I suggest you try several and find one you like. Options include very simple trackers all the way up to visual trackers.

Mileage Tracking

There are myriad mileage trackers for the iPad. However, you might be better off using a tracker on your phone, since many phone mileage trackers will enter the information for you as you drive. If you want a mileage tracker for your iPad, try several different apps and choose one that fits your style. There are many excellent options.

Computer Access

LogMeIn and GoToMyPC provide access to your computer desktop. These programs let you remotely control your computer through your iPad. There are both free and pay versions for the services. You should get the full version of one or the other. You need to set up the software on your computer to work with the app.

Credit Cards

Square – Free with fees for transactions

Square is both a device and an app. You connect the device to your iPad and can then use it to take credit cards. You can also take cards without the device. Quite a few companies now offer similar tools. Look for the best deal.