



# Publications

- Publications Overview
- E-Clips
- Illinois Bar Journal**
  - Archive of Past Issues
  - Subject Index
  - Title Index
  - Author Index
  - Manuscript Guidesheet
  - Legal Writing Contest
  - Every Lawyer's Guide to...
- Illinois Lawyer Now
- Illinois Lawyer Now (Print)
- Illinois Courts Bulletin
- ISBA Case Digests
- Section Newsletters
- Bookstore
- Classified Ads
- Advertise with ISBA

# ILLINOIS BAR JOURNAL

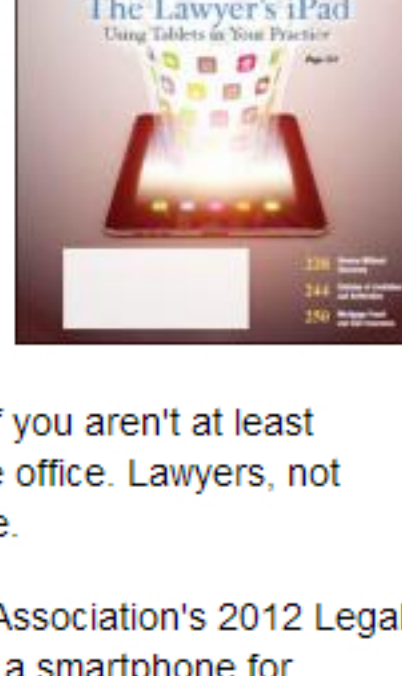
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The Magazine of Illinois Lawyers

## Legal Technology

### The Lawyer's iPad: Using Tablets in Your Practice

By Maria Kantzavelos



If you don't have a tablet, you're probably thinking about getting one. But can you really use one to practice more effectively? Tech experts say "yes" and tell you how to use mobile devices to increase productivity and gain an edge in the courtroom.

If you're not using a smartphone in your law practice, you're in the minority. Likewise if you aren't at least thinking about getting a tablet for tackling law-related tasks while you're away from the office. Lawyers, not known as early adopters of other technologies, have enthusiastically embraced mobile.

Smartphone use by lawyers today is nearly universal, according to the American Bar Association's 2012 Legal Technology Survey Report, in which 89 percent of attorneys surveyed reported using a smartphone for talking, emailing and other law-related tasks while away from their primary workplace. And 33 percent of lawyers reported using a tablet computer in 2012 as part of their practice, a jump from the 15 percent in 2011. In addition to Apple's popular iPad, there are Android tablets like Amazon's Kindle Fire, Samsung's Galaxy Tab, and the Nexus 7 by Google. To name a few.

"I think there's a gee-whiz factor, but I'm seeing more and more lawyers having a tablet of some kind," said lawyer Nerino J. Petro, Jr., practice management advisor for the Law Office Management Assistance program of the State Bar of Wisconsin and a member of the ISBA's Standing Committee on Legal Technology. "[Some are] not sure what to do with it. But others are using them in their practices on a daily basis." Aside from the gee-whiz factor, lawyers who don't leave the office without their tablet cite convenience as its main draw.

"Either a smartphone or a tablet helps the lawyer to be mobile, helps lawyers to conduct business while they're out of the office, to be able to serve their clients better, to be able to actually run their law practice when they're out of the office," said Dallas-based lawyer Tom Mighell, author of the ABA books *iPad in One Hour for Lawyers*, *iPad Apps in One Hour for Lawyers*, and *iPad in One Hour for Litigators*.

Mighell, a self-described "technology nut," is a senior consultant with Contoural, where he helps companies deal with records management and electronic discovery. In his blog *iPad-Lawyers*, a companion to his books, Mighell shares some of his latest tips and tricks on using the iPad and reviews apps that lawyers can use to increase productivity at work and elsewhere (see sidebar).

"A mobile device helps you carry on your practice whether you're on vacation, in court somewhere, or on the road somewhere," Mighell said. "It helps to be your office away from home."

Rockford attorney Aaron W. Brooks agrees that if you find yourself with two hours of downtime while out of the office, turning to a mobile device equipped with the right apps can make for a productive wait.

"That two hours can be productive if you have everything in front of you to bill two hours," said Brooks, a member of the ISBA Standing Committee on Legal Technology. "In the past, I'd have two hours, but all my stuff is in my office. It helps capture a lot of time in your life that would otherwise be unproductive, which leaves a lot of other time to do fun stuff. It's more about working when you want to, where you want. The only way to do that is to make sure all of your information is available where you are."

While laptops can give lawyers a measure of this connectedness, they don't do it as completely and effectively as tablets and smartphones (they don't call them "mobile devices" for nothing). And increasingly, organizations and other entities are acknowledging the burgeoning technology by allowing users to interact with them in a more mobile-friendly fashion. For example, the ISBA recently rolled out a mobile-optimized version of its website (see the sidebar on page 236 for more about viewing the IBJ on your mobile device).

### Don't app for app's sake

So how can lawyers get the most value from these mobile tools that seem to be everywhere? Mighell's answer starts with a question: "As a lawyer, what do you want to be able to do when you're away from the office?"

"The first step is to figure out what is it in your particular practice that you want to be able to do on the road that you're either not getting done now or is not working the way you'd like it to."

The answer to that key question, Mighell said, can then lead lawyer tablet-user wannabes to the right applications to help accomplish those tasks.

That's what Brooks does when he looks for apps for the mobile devices he uses in his own practice at Holmstrom & Kennedy P.C. "I first define the problem I need to solve. I'm not looking for an app just to have an app," he said.

Brooks, who focuses his practice on the law of health care technology, offered this advice on finding apps that are right for you and your practice: "Define the parameters of what you want the app to do to solve that problem. Then go to look for those apps that have the most downloads with the highest ratings. Try three and stick with them for a while."

"A lot of people get addicted to finding that new silver bullet for productivity, so they jump from app to app and never settle into a system and grow it," Brooks said. "Find one that works really well and grow it, expand it. Really dig into it and don't abandon it for the next shiny object that comes along."

And, Brooks said, try to avoid "app overload." "If you have too many apps going at the same time, your information is going to get fragmented and you're going to get lost," Brooks said. "Use as few apps as possible, so that all your information is centralized."

No matter which sort of mobile tech tools you settle on, "To get the most out of your tablet you've got to learn how to use it," said Petro. He recommends New Orleans-based attorney Jeff Richardson's *iPhoneJ.D.* and Oklahoma City attorney Jeffrey Taylor's *The Droid Lawyer* as two of the many blogs on the subject, and he advises lawyers to spend some time on technology informational sites like *MakeUseOf*, which offers free user guides, as well as *How-To Geek*.

Naperville attorney Bryan M. Sims of Sims Law Firm, Ltd., who focuses his practice on commercial litigation and civil appeals, is an avid tablet user.

"I have an iPad and pretty much don't go anywhere where I'm going to work without it," Sims said. "It's got my email, calendar, contacts. I can also access all the documents in all my files from my iPad."

"We all think and work a little bit differently. Find an app that works the way you do, rather than force yourself to work another way," Sims said. "Generally, there's not just one app in any particular category."

For lawyer mobile device users, Sims said, "It's a real benefit if you make sure that your calendar, your email, your contacts are all synchronized with the information you have at the office, the information you have on your smartphone, so that information is the same on every device."

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"I run into attorneys where that is not the case," Sims said. "It's a simple thing to achieve and it really pays off. No matter what device you have, you can make a change, put an entry in, and it appears on all of your devices."

It's simple, Sims said, because with just a one-time set-up everything stays synchronized. He does this by using a hosted Exchange server, which is designed exactly for this purpose. "If you are not an Outlook fan, you can use Google Apps for business. It will accomplish the same thing," Sims said, noting that either of these solutions costs about \$5 per email account per month.

### Lawyer-worthy apps

Though there's more to smartphones and tablets than apps, apps are a key component of mobile's appeal. "The reality is, I do most of my research on my iPad rather than my computer," Sims said. "[That's] mostly because I find that the apps on my iPad are scaled down so you don't have a lot of clutter on the screen. I prefer that over what I'm seeing on the computer."

So what are some apps lawyers need? TranscriptPad is among Sims' favorites. "It's designed to allow you to read and annotate transcripts from depositions and trials. You read it on your iPad, you can mark it up, and when you're done, you can export it in a variety of different formats."

He uses the app Keynote, Apple's version of PowerPoint, to prepare presentations on his mobile device.

"I spend a lot of time away from my office because of the nature of my work," Sims said. "I'm in court waiting for cases to be called. There's time you could be working that you're otherwise not if you don't have a way of doing the work. I can take my iPad with me and do my work wherever."

He said he uses "a ton" of apps as part of his practice while out of the office, including rulebook, which allows users to download various court rules. With the rulebook app, which is compatible with iPhone, iPod touch and iPad, lawyers can take all the rules they have downloaded anywhere they go and quickly access them without the need for an internet connection.

"I use that for Illinois Supreme Court rules and Illinois rules of ethics, federal rules of evidence, the code of civil procedure," Sims said. "It doesn't matter which court I'm going to...if I need to look up one of those rules, it's right there without having to remember which book to carry with me, or carrying multiples. And it doesn't weigh any more. It's all in my iPad."

"There are a dozen different pdf apps out there," Sims said. "If I'm reading I'll use a particular app. If I'm annotating a case, marking it up, I'll use a different app."

In March, the Cook County Clerk's Office unveiled a mobile app designed to put court-related information at the user's fingertips. The Court Clerk Mobile Connect app, which is free, can be downloaded for use on an Android or iPhone, iPad I, II and III, and iPod touch. It offers a variety of features, including options to search the court's electronic docket for civil and traffic cases, search the court call roster, get updates on fee schedules, and locate and contact Cook County Court facilities.

the court's electronic docket for civil and traffic cases, search the court call roster, get updates on fee schedules, and locate and contact Cook County Court facilities.

Evernote is another one of those "really useful applications" for lawyers, Petro said.

"That's available for all the platforms and the data is shared across all the platforms," Petro said. "It's like an electronic binder. You can easily take notes and get information into it. It synchronizes between all your devices and desktop computer. If you save something from your tablet or phone in an Evernote note, when you get back to your office it's on your desktop as well."

### Leveling the field for litigators

Trial lawyers in particular are putting tablets to work. Many had already traded clunky foam-core boards and paper files for laptop-centered presentations. But now lightweight, easy-to-use tablets - and their assorted apps - are leveling the playing field for litigation technology.

Before mobile devices like the iPad came along, Mighell said, a lawyer who wanted to use technology to present evidence in court had to hire a technician or recruit a tech-savvy assistant or paralegal. "It's not very practical for a lawyer to try and run that technology from a laptop and run a case at the same time," Mighell said. Lawyers who were without the resources were "stuck with hauling boxes of paper to the courtroom, and watching as better-equipped lawyers across the aisle presented their cases effectively and efficiently using technology."

With a slim, easy-to-use tablet such as an iPad, Mighell said, "If you're a solo lawyer and want to go to trial and can't afford an assistant, it allows you to do these things by yourself with minimal technological knowledge."

Nowadays, Mighell said, "You can just walk into a courtroom with an iPad and try a case. Many lawyers are doing it very successfully today."

"An iPad is not ideal for every kind of case," Mighell said. "In some cases you've got so many documents that you're probably going to need to hire somebody to help present them. But for other cases, the iPad makes a lot of sense."

And the iPad is the leading tablet for trial practitioners, at least for now. "If you're planning on using a tablet in the courtroom, the iPad still has the most legal-specific apps," Petro said. "If you're going to be in court a lot and you're going to use it for trial, you'd probably want to go with an iPad still. It's been easy for long. Some of the trial-based apps that are available on the iPad are now available for the new Windows 8 platform," Petro said.

From the very beginning of a case, when the client first walks through the door, Mighell said, "You can do client intake on an iPad and take notes on it when you're meeting, tally deadlines, review documents, review and take depositions, review transcripts, conduct jury selection. You've got a number of trial presentation apps to help you present evidence in the courtroom. You can have your entire law library on the iPad."

Tablets also offer mobility in the courtroom.

"You're so liberated," Mighell said. "Being able to present wirelessly really makes it easy to get around the courtroom, walk back and forth, and still be able to show things on the screen to the jury."

"You can walk to the podium with all your evidence, you can walk to the judge and show case law," Mighell said. "It just makes it easier to get around in the courtroom and show things that you couldn't do if you were using technology otherwise."

The gadgets can also have some influence on juries.

"Juries have started to have expectations about using technology," Mighell said. "There is a cool factor with the iPad and being able to demonstrate it. Juries have commented on that."

"You want to be most effective in showing them evidence. Showing documents by paper is becoming less and less effective and a less meaningful way of presenting evidence at trial. The iPad really shows that to a jury."

While he acknowledged that the world of apps is ever-changing, Mighell highlighted a few litigation apps for the iPad that he said are worth checking out, including TranscriptPad for reviewing and annotating transcripts, and TrialPad, "the number one evidence presentation app out there" because of its many easy-to-use features.

There's even an app, complete with avatars, that's designed to allow trial lawyers to use their tablets as a tool for jury selection.

"As you go through the voir dire process, you can make notes, create a diagram of the jury box...You've got the information that's readily accessible on a tablet that you can take with you and study, instead of flipping through [paper] notes. It's an efficiency thing," Petro said.

### Change is the constant

All of this is just a snapshot, of course. The world of mobile is constantly changing. Smartphones are available in bigger versions and tablets in smaller models, so that the two seem to be meeting in the middle. Ultrathin laptops are beginning to blend the power of traditional computers (think real keyboards and software like Word and Excel) with the simplicity of apps in a smaller, lighter package. Some content providers are abandoning native apps - the kind you download - in favor of mobile-friendly HTML that adjusts its display to the kind of device you're using.

But these are refinements of mobile, not replacements for it. The challenge for lawyers - and for courts, whose restrictions on smartphone use frustrate many lawyers - will be to keep up with developments and keep looking for the best ways to use mobile technology to serve their clients and their practices.

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### Two cheers for tablets

As tablet use continues to grow in popularity and erode PC and laptop sales, skeptics point to what they regard as weaknesses for business users. Two stand out for lawyers.

First, tablets use virtual keyboards. "[A]lthough more people are warming to virtual keys, there are still many folks around the globe that like having the standard physical keyboard found in PCs," writes Don Reisinger in *eWeek*. "And why not? Typing on traditional keyboards with two hands is far more accurate and efficient." You can add physical keyboards to tablets, and many users do, but it costs extra.

Second, despite all the fancy apps available for tablets, in some key areas they don't have the functionality of PC/laptop standbys. "Nowhere is that more apparent than in the comparison of Office [notably Word] on mobile and PCs," Reisinger writes. "Don't forget that laptops allow mobility, too, and ever-smaller versions are challenging the tablet on that front."

Reisinger's article, *Tablets Still Cannot Replace Laptop, Desktop PCs: 10 Reasons Why*, is at <http://www.eweek.com/mobile/tablets-still-cannot-replace-laptop-desktop-pcs-10-reasons-why>.

- Mark Mathewson

### More top tablet apps for lawyers

In addition to those listed in the main article, our tech experts point to their favorite apps and related tools for the iPad and other tablets.

**Must-have iPad apps.** In his book *iPad Apps in One Hour for Lawyers*, and Distill them into a curated collection of recommended apps for lawyers in different categories - productivity, legal-specific, news and reading, reference and research, travel, and utilities.

In an interview with the IBJ, he shared some of his picks for apps that he calls "must haves."

"The first app anybody should have on a device is Good Reader," Mighell said. "It helps not only to read documents, but also to annotate and review documents. It also helps you manage the documents you have. I know a lot of lawyers who actually do all of their case management through this app."

For taking notes on an iPad, Mighell recommended Noteshef. "I like it because it's simple to use, it provides you with a great note taking experience, and [lets you] save those notebooks in a pdf format," he said. Another helpful app for taking notes, Mighell said, is Notability, which lets you "record a meeting and take notes at the same time."

For working on documents, Documents To Go is a "solid app," Mighell said. And PDF Expert is his favorite for working in pdf files.

**External keyboards.** Whether they're using an Apple, Android, or Windows device, lawyers need an app that will not only open files but also allow highlighting and annotation, Nerino Petro said. "The idea behind that app is, wherever you are, you need a way to be able to read [a document] and make notes on it if you want to be able to share that with someone else or capture the information yourself at a later date," Petro said. For an Android, he said, RepliGo Reader or ExPDF are good options.

Petro said tablet users should also have a document storage app. "Ideally one that integrates with the various apps on the iPad, [such as] Dropbox and Box.com. The nice thing about those is they work on your smart devices, your laptops, and they also have an internet component."

And, Petro said, "if you really want to be productive on these [tablets], you're going to need an external keyboard. "If you're really planning to work, having the keyboard is just easier," Petro said. "You're generally going to be faster than typing it on the screen of the device itself."

Apple and Logitech make popular keyboards for the iPad, both priced at or under \$100.

**Security.** Security is key to a lawyer's use of mobile devices in the practice, experts said.

"You have a lot to consider when talking about security," Mighell said, "[whether] you're a solo lawyer trying to secure the iPad itself or at a firm and making sure you're keeping secure access to the files of the company."

At a minimum, Mighell said, lawyers should review the security settings on their iPad and make sure they set a security code of more than four digits. "Four digits is not a secure number," he said. "These days [you need] 10 to 12. Make sure you set a security code, make sure you set an option to erase all the data on your device if there've been 10 unsuccessful attempts to enter a password."

Petro recommends two-factor authentication apps designed to keep a user's account safe in the event of a compromised password. An example is the Google Authenticator app, which could be set up to work in conjunction with cloud-based document storage tools like Drop Box, he said.

On the subject of security, Aaron Brooks advises lawyers to use complex passwords on their smartphones, virus protection, and a set-up that allows a user to wipe or locate a device remotely. The Find My iPhone app can be installed on another iOS device to help users locate it on a map, play a sound, display a message, remotely lock the device, or erase all the data on it.

"Uploading your entire practice to the cloud is disastrous if you're not doing it in a secure manner," Brooks said.

It's also important to make sure all of your apps are cloud-based, Brooks said, so that "whenever you use it on your phone, it's syncing on all your devices."

- Maria Kantzavelos

### Mobile-friendly ISBA website, tablet-ready IBJ

As more ISBA members view websites and publications on their smartphones and tablets, we've developed mobile-friendly versions to make that experience better.

**Phone-friendly website and E-Clips.** When you visit [www.isba.org](http://www.isba.org) with your smartphone, you'll find an optimized, easy-to-read-and-navigate version of our site instead of the tiny text you too often encounter elsewhere on the web. A smartphone-friendly version of our popular E-Clips email, complete with links to news and case digests, should also be arriving in your inbox by the time you read this. You can also access the most current issue of E-Clips from your mobile device by going to [www.isba.org/eclips/current](http://www.isba.org/eclips/current) and saving the icon to your home screen.

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