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TECHNOLOGY

Mobile Lawyering: Using Tablets in Your Practice

The sophistication of tablet devices and the availability of file access, MS Office compatibility, cloud file storage, and peripherals for typing and capturing information make tablets a viable, light-weight option for mobile lawyers.

NERINO J. PETRO JR.

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One question that I am asked all the time is "Can I really use a tablet in my practice?" The answer today is an overwhelming "Yes!" Tablet devices are now ready for prime time, and there has never been a better time to buy one. You can choose from Apple's iconic iPad, which started the tablet revolution; Android tablets from companies such as Samsung, Asus, and Lenovo; or a Microsoft Surface Pro or another Windows 8 tablet.



Evolution in Work Site Mobility

As people in general have become more mobile in their work habits, so have lawyers. Many lawyers and their employees seem to spend as much time out of the office as they do in it. Just a decade ago, the "mobile" lawyer relied on a personal digital assistant (PDA; think Palm) for tracking appointments, contacts, and even tasks, a flip phone, and a notebook computer. These somewhat bulky and heavy notebook computers (at least compared to today's models) were the workhorses of the mobile lawyer.

Just as they do today, notebook computers then typically ran programs that lawyers were accustomed to using for word processing and email. They could also connect over a modem to the office (if necessary) to access documents and files or to access email or the Internet. However, carrying multiple devices meant that the lawyer or staff member was often transporting more than 8 to 10 pounds' worth of technology.

Smartphones began the next round in the evolution of mobile lawyering, combining features of the PDA with those of the cellphone. In 2009, Apple took things to the next level with the introduction of the iPad, which, at the time, many in the legal community derided as just a larger PDA-type device. Five years later, reality has proven those critics wrong.

The iPad took the general business and consumer worlds by storm. The devices quickly found their way into the hands of lawyers who saw potential in having a device with a 9-inch screen and the ability to run apps to do everything from checking email and synchronizing calendars to displaying PDF files and presentations to drafting documents. Competitors soon appeared, including tablets based on Google's Android operating system; even Microsoft made another run at creating a Windows 7-based tablet.

For the majority of lawyers, though, the iPad and its competitors were seen primarily as devices for the consumption of information – downloading emails or documents for review, surfing the Internet, and checking calendars. With the exception of the most diehard proponents, using a tablet as a production tool was out of the question. This changed with a confluence of several factors that moved tablets from consumption tools to production tools.

Tell Us!

How has a tablet changed your practice? Comment below.

Peripheral Devices

Peripheral devices such as external Bluetooth keyboards allow lawyers to use an actual keyboard rather than the onscreen keyboard on the tablet. The onscreen keyboards are good for minor typing, but they are not practical for major drafting projects. Today's tablet users have several options when it comes to keyboards. You can purchase a portfolio case for iPad and Android tablets that incorporates a Bluetooth keyboard into the cover or stand-alone portable keyboards.

Asus introduced the concept of a detachable keyboard with its 10" Transformer Prime Android tablet and keyboard. When connected, the device resembles a very small notebook computer. Logitech created one of the most popular keyboards for the iPad with its ultra-thin keyboard cover. At the same time Microsoft introduced its Surface tablets, it introduced two different keyboard covers. Users now have the benefit of an actual keyboard without adding significantly to the weight or bulk of the tablet.

Improved File Compatibility

Many apps now exist that allow improved compatibility with Microsoft Word, Excel, and PowerPoint files. Office suites for Apple, BlackBerry, and Android devices (even for the old Palm system) have been around for many years, but recently companies have worked diligently to improve these suites' compatibility with MS Office files, the de jure standard in the business and legal world today. Although these products handle MS Word and Excel files with differing levels of compatibility, they have reached the point at which a lawyer can access a file from the office and make changes and corrections or draft new files on the go.

With the introduction of the Microsoft Surface tablet in 2013, lawyers can open these files in their native formats in the actual software itself, eliminating any compatibility issues from other products. The availability of Office online, Office for Android, and in April 2014, Office for the iPad signal a paradigm shift for lawyers who want to work on multiple platforms but with the native Word and Excel files in Word or Excel. For example, although I started writing this article on a Windows PC using Word 2010, I completed it on my iPad using Office for iPad while on vacation.

Cloud Services

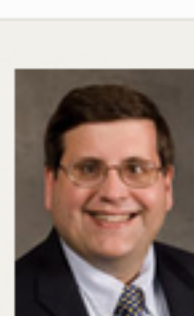
Cloud-based file synchronization and storage services such as Dropbox, Google Drive, Box.com, and others have eliminated the need to transfer files to a tablet while in the office or to put them on a USB flash drive (getting files from a flash drive to an Android or Windows tablet can be done, but it usually requires the purchase of an adapter). With improvements to the Internet and widespread deployment of Wi-Fi and cellular broadband, lawyers are no longer tethered to a phone line to remotely access information. Modern cloud services have put access to documents within a few taps on the screen or keyboard and automatically synchronize to the office. This is especially important because the iPad natively only allows you to place files on the iPad using Apple iTunes; anyone who has done so knows this is a less-than-optimal solution.

With a Wi-Fi connection, you can transfer documents to and from your tablet and even make them available on the tablet when you do not have an Internet connection, using techniques such as making a file a favorite in Dropbox. Unlike a full Windows or Mac computer, tablets have limited storage space, so if these cloud-based services synchronized the actual files rather than just the file names, you would quickly run out of storage on your tablet. Most of the popular cloud-based services have some type of offline-access capability.

Using Tablets in Daily Work

Now lawyers can take one device that weighs less than two pounds and have at their fingertips their calendar, contacts, files, apps (think programs), Internet access, email, and more. While the iPad and Android-based tablets only run apps specifically designed for them, Windows Surface Pro and similar tablets run the full version of Windows 8.1. In other words, depending on how much memory is required, you can run almost any Windows program you have in your office on your Surface tablet.

You can use your tablet to have a potential client or a new client complete an intake questionnaire. On the iPad, you can use a tool such as FormConnect to create an intake questionnaire that the person can complete on your iPad. You can then use one of several formats, such as comma separated value (CSV), to export the information from your iPad and into your practice management software or Outlook. You can also use a tool that creates online forms to capture this information and export it to your office system. The online tools are useable by not only iPads but also Android and some work with Windows tablets as well, including FormStack online, GoFormz, JotForm, and others.



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If you prefer, you can collect this information on a PDF form and capture the person's signature. On the iPad, I like PDF Expert. On Android, I use RepliGo PDF Reader and ezPDF Reader, and on my Windows 8.1 Dell Venue Pro, I use Nitro Reader. In addition to using your own PDF forms or documents, these tools also allow you to open a PDF sent or generated by another person and add annotations, highlighting, and even

signatures.

For example, while I was visiting my father during my vacation, I needed his signature on a form that a bank had emailed to me. I could have printed the form and sent it to my father by U.S. mail. Instead, when I got to his Florida home, I opened it on my iPad, captured his signature using PDF Expert and a stylus, and then emailed it from within that app directly to a bank employee.

On the iPad, these types of third-party apps usually give you access to cloud storage services so you can overcome the limitations that Apple places on the ability to store files on the iPad. Several apps are available for these purposes, and recommendations can be found at sites such as Tom Mighell's iPad 4 Lawyers blog, Jeff Richardson's iPhone JD blog, Scott Grossberg's The iPad Lawyer blog, and Jeff Taylor's The Droid Lawyer blog, to name a few.

When it comes to working with MS Office documents, the iPad has its own Works suite consisting of Pages, Numbers, and Keynote. Other popular iPad office suites include SmartOffice 2, DocsUnlimited, OfficeSuite Professional, and Documents to Go. OfficeSuite Pro and Documents to Go are also available for Android. Windows 8 can run full-blown MS Office or run versions designed for the modern user interface, which is more like an app. On Windows 8, you can also run free products such as LibreOffice. However, if you use the MS Office product designed for your device, you will get the best compatibility and avoid potential problems when converting from one suite to another.

Each tablet platform has multiple Web browsers available, including several, such as Chrome and Opera, that will work on each platform as well as on your desktop or notebook computer. You can also access your email through its Web interface or by a the native email app on each platform for POP3, Web, and exchange email. Gmail has a GMAIL app for both iPad and Android and the third-party Gmail Touch for Windows 8. Modern UI. For Outlook power users, take a look at TouchDown HD.

You can also use your tablet with voice-over-Internet-protocol (VoIP) services such as Skype, Vility.com, 8x8, and others, using either their native apps or a third-party soft-phone app such as X-Lite (free), Bria (paid), and others. With a Wi-Fi connection and one of these services and apps, your iPad, Android, or Windows 8 tablet becomes a VoIP phone allowing you to make and place audio calls. With Skype or Zoom.us, you can also use your tablet for video calls.

Tablets and Apps for Courtroom Use

Many lawyers want to use a tablet in the courtroom, but before the introduction of the Windows Surface Pro tablet running Windows 8, the only tablet that had law-practice-specific apps was the iPad. In fact, you will still find that if you want to use a tablet in court, the iPad is probably your best choice (unless you already have Windows-based trial products that you can also place on another device, such as a Surface Pro tablet according to your license). Trial apps have just not made it to the Android world as the majority of lawyers were using iPads. As more lawyers adopt Android, this will probably change. However, this does not mean that you can't also have an Android phone or a Windows notebook computer.

The iPad is the best choice for lawyers who want trial apps because it has the most available. Two of the best and most widely used are TrialPad, for trial presentation; and TranscriptPad, for transcript review. In fact, the second version of TrialPad has been released with significant improvements over the prior version. However, these apps are costly – each is \$89.99, which for an app is very expensive. But the lawyers who use them love them.

Two newer iPad apps in this market niche are Second Chair Mobile for trial and Second Chair Jury for jury selection. Both are impressive in terms of number of features and ease of use. Other iPad-specific trial and jury apps include ExhibitView, JuryPad, and iJuror.

As stated above, there are no trial apps available for Android, although general-presentation apps can be used for courtroom presentations. Windows 8.1 can run software that will run on the desktop for trial work, but this depends on the storage and memory capacity of your Windows 8 tablet. At the time of drafting this article, the only Windows 8 Modern UI trial app available was iJuror. One work-around for Android and Windows 8 is to use MS OneNote, which now is free, for trial notebooks.

Conclusion

A tablet can replace a notebook for many lawyers when they are out of the office. The availability of file access, MS Office compatibility, cloud file storage, and peripherals that make working with a tablet easier for typing and capturing information make tablets a viable option for modern mobile lawyers looking to lighten their load.

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