

iPhone J.D. Lawyers using iPhones and iPads

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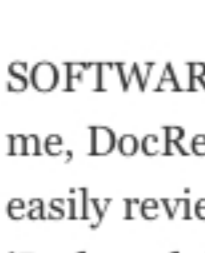
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July 07, 2015

Review: DocReviewPad -- review and annotate documents on the iPad



LIT SOFTWARE is one of the best publishers of iPad apps designed for lawyers. The TrialPad app lets you present evidence at trial. The TranscriptPad app lets you review and annotate deposition transcripts (and is one of the most useful apps in my law practice). Yesterday, LIT SOFTWARE released its third app for the iPad, and it is called **DocReviewPad**. To me, DocReviewPad is sort of like TranscriptPad for documents. The app lets you easily review, annotate and apply codes to documents as you review them on your iPad, and then export documents for production. The app applies Bates numbers as you import documents. You can use the app for a document production from your own client, marking documents as relevant, privileged, etc. as you review them, so that when you are done you can produce all of the relevant documents, plus create a list of documents for which you will need a privilege log. You can also use the app to review and annotate documents as you work up your case — either your own client's documents or documents produced by other parties in the litigation.

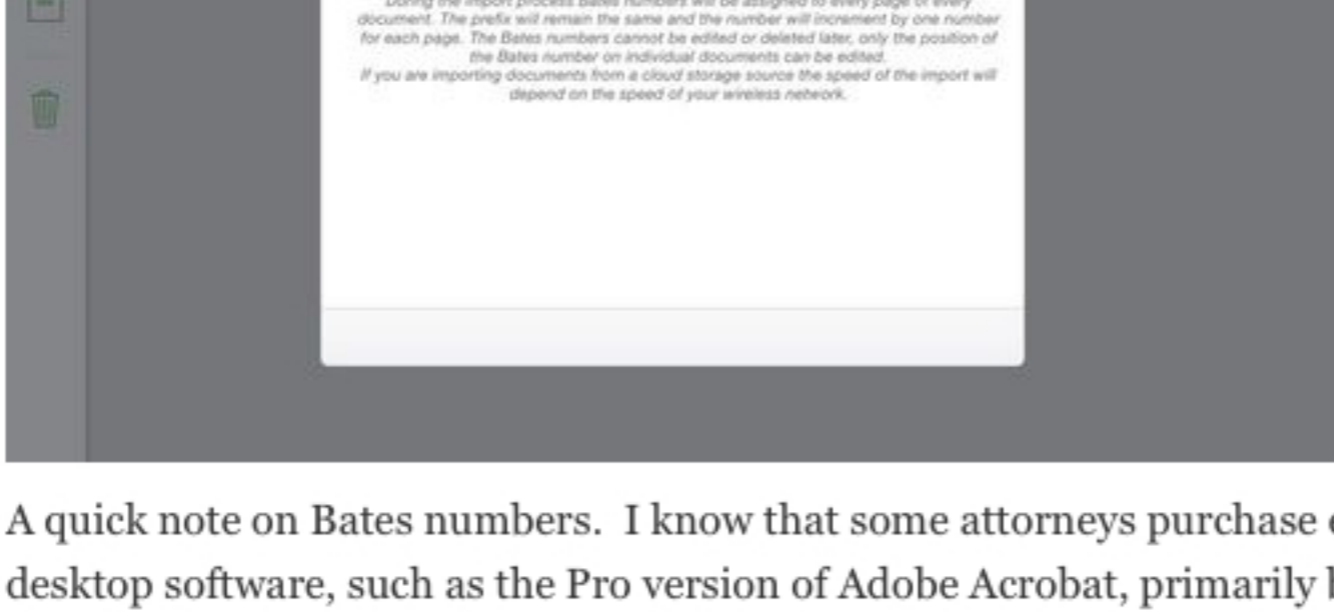
A few days ago, LIT SOFTWARE gave me a free review copy of this \$89.99 app. (Note also that LIT SOFTWARE has been a sponsor of iPhone J.D., although the company is not a sponsor this month.) While I haven't yet had the opportunity to make real-world use of this app with one of my litigation files, I did kick the tires on the app over the Fourth of July weekend to get a feel for it. Overall, I'm impressed. The app lacks some of the features that you find in similar software for the desktop computer, but there is still quite a bit in this 1.0 version of this app, plus this app is far easier to use than any similar software (such as Summation) that I have used on my PC.

Importing documents

The app can import documents in PDF format, which is what I typically use, but can also handle TIF, JPG, PNG and TXT. It is far easier to have each document in a separate file before you import into DocReviewPad. For example, if your opponent produces a single 200-page PDF file in response to a request for production of documents, I recommend that before importing into DocReview Pad, you use your computer (or have an assistant do so) to break up that single PDF file so that each file corresponds to a document. It is possible to split up a document within the app: press Select, tap the document, press Edit, tap on Extract Pages, and choose a page range to export. (The Bates numbers will be retained.) But in my tests, it was faster and easier to handle this task on a PC or Mac before importing in to DocReviewPad.

There are lots of ways to import documents. I suspect that most folks will import from a cloud storage service, and the supported services are Dropbox, Transporter, Box, Citrix ShareFile and WebDAV. You can also connect your iPad to your computer and import documents using iTunes, or you can import an attachment to an email simply by opening the attachment in the DocReviewPad app. The app asks you to assign a case for the imported documents, or create a new case if this is the first set of documents for that case.

Next, you tell the app how to apply Bates numbers to each page of each document. You can decide what prefix to use, how large the Bates number should be, where it should be placed, etc. By default the app assigns the numbers sequentially; for example, if your last import finished with ABC-001234, then the next import will begin with ABC-001235. But if you need to change that, you can manually adjust the starting number.



A quick note on Bates numbers. I know that some attorneys purchase expensive desktop software, such as the Pro version of Adobe Acrobat, primarily because that software can assign Bates numbers. Because DocReviewPad includes this feature, this \$90 app may make it unnecessary for you to pay for much more expensive software on your PC or Mac.

Once your documents are imported, you will see a list of each document on the left, and the document itself will display on the right. A magnifying glass icon indicates that a document was OCR'd before you imported it (and thus searchable).

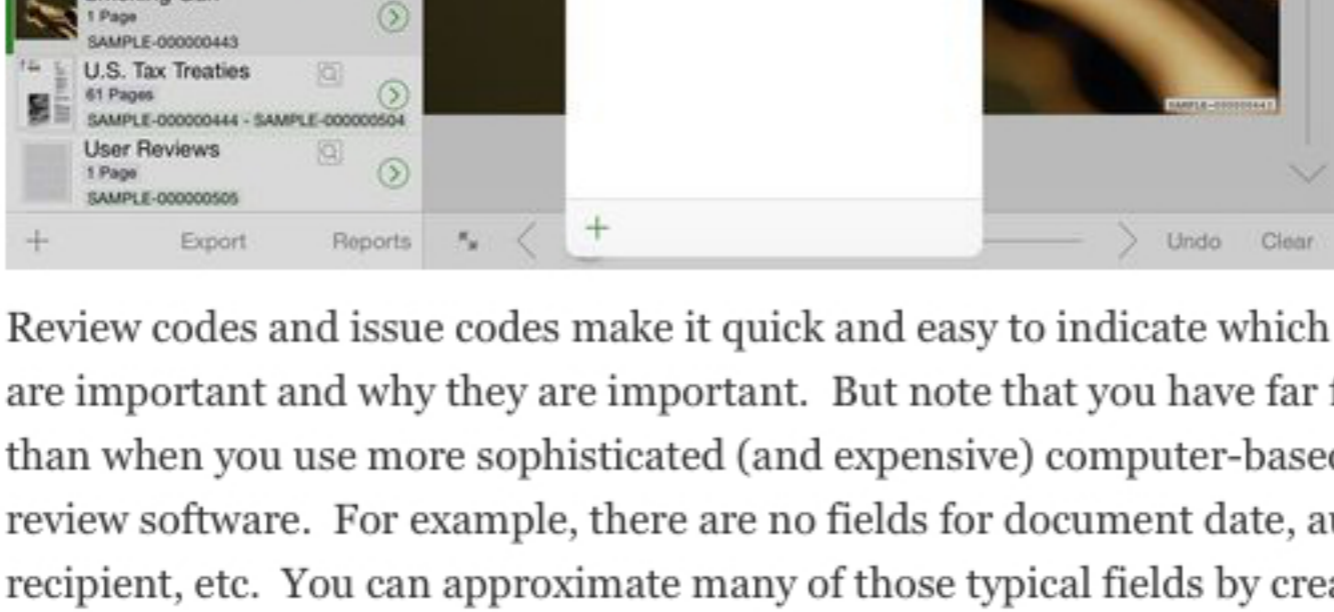
Reviewing and annotating documents

To read a document, just tap it from the list in the left. If you press the double-arrow button at the bottom of the screen, the list disappears so that you can review a document using the full iPad screen.

Swipe left and right to move between pages of a document. Swipe up and down to move between documents. You can also use scroll bars on the right and bottom to navigate between pages or between documents.

The three main tools that you will want to use as you are reviewing documents are at the top: Review, Annotate and Flag.

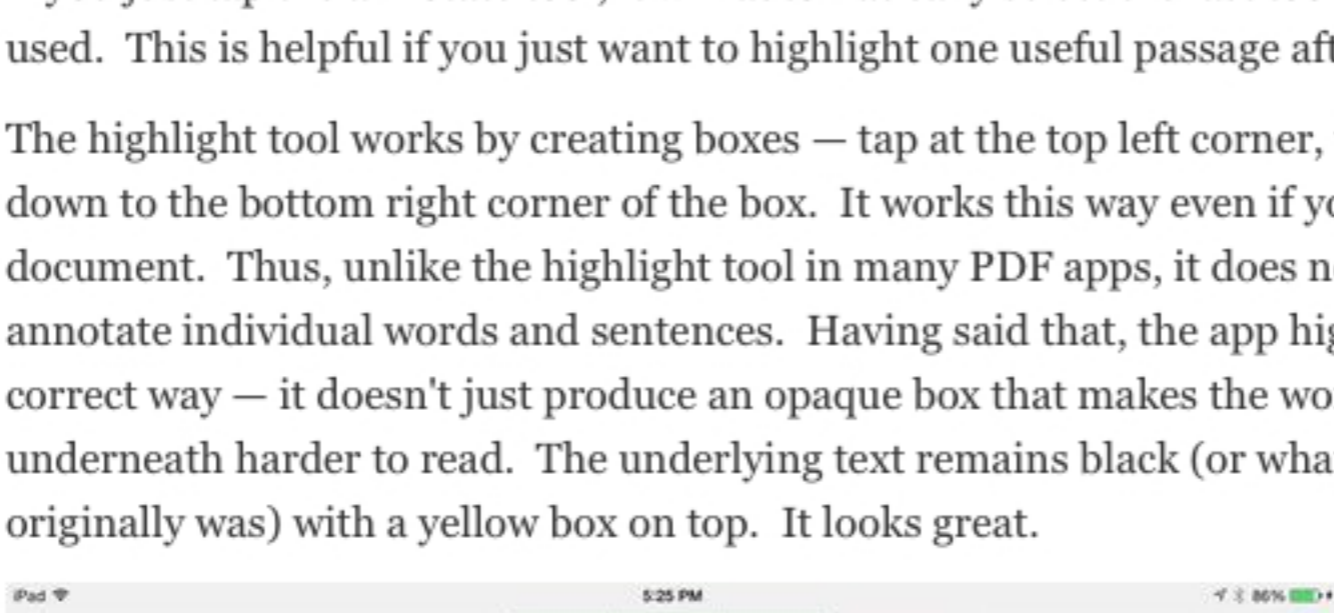
Review. The review tab lets you tag a document as Confidential, Privileged, Relevant or Responsive. You cannot change those four tags. However, you can create your own Issue Codes, and they work just like Issue Codes in the TranscriptPad app.



Review codes and issue codes make it quick and easy to indicate which documents are important and why they are important. But note that you have far fewer options than when you use more sophisticated (and expensive) computer-based document review software. For example, there are no fields for document date, author, recipient, etc. You can approximate many of those typical fields by creating appropriate Issue Codes, but it is not quite the same thing.

Thus, if your primary reason for reviewing documents is to place them in chronological order, DocReviewPad isn't a great solution. But if instead you want to indicate which documents are important and assign them to general or specific categories that you create for your case, DocReviewPad works great.

Annotate. Use the Annotate button to annotate the document. A long press on the button will bring up a list of tools that you can use: the highlight tool, and a pen — either one that lets you write freely, or one that creates lines.

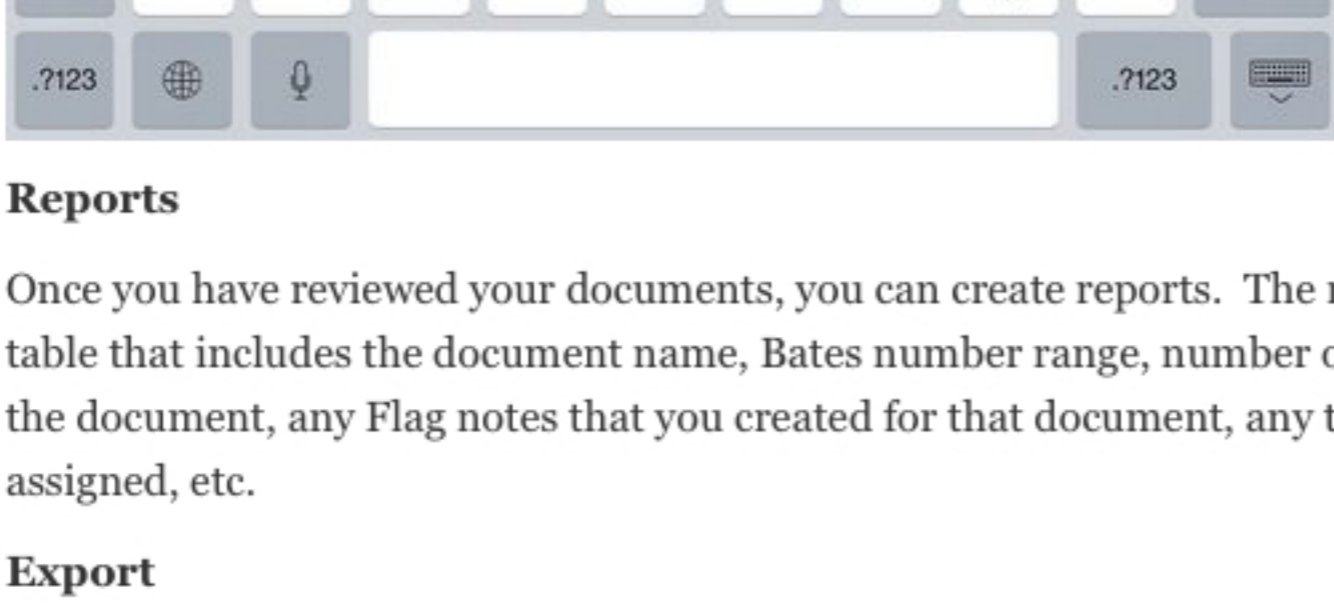


If you just tap the annotate tool, it will automatically select the last tool that you used. This is helpful if you just want to highlight one useful passage after another.

The highlight tool works by creating boxes — tap at the top left corner, then drag down to the bottom right corner of the box. It works this way even if you OCR a document. Thus, unlike the highlight tool in many PDF apps, it does not just annotate individual words and sentences. Having said that, the app highlights the correct way — it doesn't just produce an opaque box that makes the words underneath harder to read. The underlying text remains black (or whatever color it originally was) with a yellow box on top. It looks great.



Flag. Finally, the flag function is a way for you to write something important about the document. It is the digital equivalent of writing a few words on a sticky note and sticking that on the document. But unlock a sticky note, you don't have to worry about it falling off of a piece of paper.



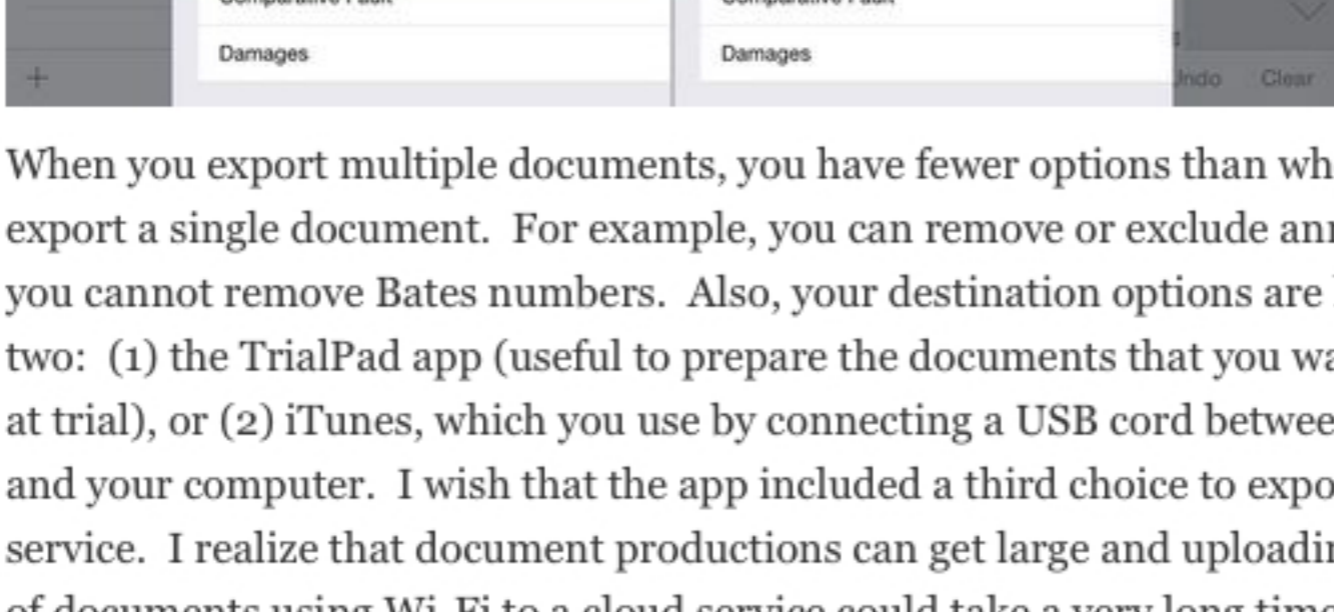
Reports

Once you have reviewed your documents, you can create reports. The report is a table that includes the document name, Bates number range, number of pages in the document, any Flag notes that you created for that document, any tags that you assigned, etc.

Export

There are two ways to export documents. If you just want to export a single document, use the Share button at the top right (the box with an arrow coming out of it). This lets you email, print, upload to cloud storage or export to iTunes on a connected computer. You have the option to include or exclude the annotations, the Bates numbers, and a Summary Report.

The second option is to tap the Export button at the bottom of the list on the left. This lets you export multiple documents from within a folder, or from all of the folders in a case. You have lots of options on what to export. You can include or exclude documents that you have yet to review. You can include or exclude document that you tagged as confidential, privileged, relevant or responsive, plus you can include or exclude documents that you have tagged with issue codes.



When you export multiple documents, you have fewer options than when you export a single document. For example, you can remove or exclude annotations, but you cannot remove Bates numbers. Also, your destination options are limited to two: (1) the TrialPad app (useful to prepare the documents that you want to display at trial), or (2) iTunes, which you use by connecting a USB cord between your iPad and your computer. I wish that the app included a third choice to export to a cloud service. I realize that document productions can get large and uploading hundreds of documents using Wi-Fi to a cloud service could take a very long time. But I'd still rather have the option, especially for those times that I just want to upload a small number of documents that I, for example, tagged as being relevant to my motion for summary judgment.

Pricing

The app itself costs \$89.99, but LIT SOFTWARE also offers bundles that can make the cost of the app much less. For example, the Ultimate Litigation Bundle costs \$249.99, which includes DocReviewPad, TrialPad and TranscriptPad — a \$60 savings over purchasing each app separately.

With Apple's Complete My Bundle option, you can often take advantage of the savings if you own other apps. For example, if you already own TrialPad and TranscriptPad, and if you previously paid full price for those two apps (\$129.99 and \$99.99), then Apple gives you credit for the \$230 that you already paid and you just pay the extra \$20 to get DocReviewPad. LIT SOFTWARE sometimes puts its apps on sale (and I often announce those sales on iPhone J.D.), so if you bought the other apps at a deep discount then Complete My Bundle might not save you money, but it is nice to have the option in case you did pay full price.

Conclusion

This is a very powerful and useful app. I have long found it easier to review documents on my iPad rather than on a computer screen, and in the past I have used general purpose PDF apps such as GoodReader to do so. Those apps are useful for annotations, but don't have any of the other features of DocReviewPad such as tagging, issue codes, Bates numbers, etc. It is great to be able to use an iPad to review documents in an app that has a full set of tools designed for this specific function. There are a few features that I would like to see included in this app, but it is very full-featured for a version 1.0. And if the company updates this app the way that it has updated TrialPad and TranscriptPad over the years, then this app will become even more powerful over time.

If you are a litigator, this is a great app. And even if you are a transactional attorney, you may still appreciate the ability to apply Bates numbers, annotate and code documents. LIT SOFTWARE has another hit on its hands, and I appreciate all that the company does to make the iPad even more useful for attorneys.

Click here for DocReviewPad (\$89.99): [App Store](#)

Click here for Ultimate Litigation Bundle (\$249.99): [App Store](#)

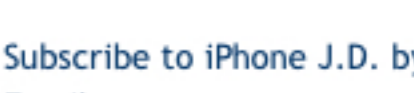
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