



# Affinity Consulting Blog

## Feature Article for February 2017 - Staying Paperless with an iPad

 Written by [Paul Unger](#)  
 Category: [Affinity Newsletters](#)



Paper is the enemy. Reducing your dependence on paper documents will make you more efficient and profitable.

Your scanner, desktop and software on your desktop is only part of the "paperless" solution. Too many lawyers continue to maintain a paper file, in addition to the digital file, because they need access to the

documents when they are away from their desk or office.

To really solve this problem, you need mobility tools, ... like an iPad, to keep everything digital and access all your documents quickly and easily from a small mobile device!

This month's feature article discusses the iPad apps you need and the workflow roadmap to follow if you want to stay paperless and finally stop maintaining a paper file. It's not overly complicated and it's definitely not expensive.

### Why the iPad?

Since the original iPad hit the market in 2010, it quickly became a useful tool for lawyers. The iPad really paved the way for the rest of the tablet market with its sleek industrial design.

The iPad's functionality is equally as nice and continues to improve as legal software developers create more apps for lawyers. Data shows that roughly 50-60% of lawyers have tablets, and of those lawyers, 80-90% have chosen the iPad as their tablet of choice.

For lawyers, there is little reason to opt for an Android tablet, especially with the introduction of convertible Chromebooks running Android apps. Windows tablets may be an alternative but Windows hasn't yet mastered the "touch first" user interface. The iPad and especially the iPad Pro remain the best tablet to help lawyers become and stay paperless. Lawyers should choose the iPad Pro over the iPad Air 2 for its processing power, better display, and particularly its compatibility with Apple's [Pencil](#) stylus.

### Using the iPad

We like to describe the iPad as an "instant-on" computer that you can control with your finger. There's no booting-up process - no keyboard needed. It is instant access to information traditionally accessed from your desktop computer or laptop. However, instead of taking minutes to boot up and another few minutes to negotiate a wireless connection, and another few minutes to connect to your firm's network, one can typically be "on", connected and working within 20-30 seconds. It is an incredibly nimble and versatile device.

The iPad was originally designed and described as a "consumption" device - a device used primarily for reading/accessing information and very light typing, but it's ease-of-use and big screen was so successful and addicting that it has morphed and has been adapted to do way more than Apple and Steve Jobs originally intended.

If you carry around a legal pad and a lot of paper in a legal file or Redweld, the iPad can become your legal pad and digital folder. It is sparking new life and re-defining the phrase "Paperless Law Office." It provides the missing technology that now can prevent an attorney from having to carry the paper file into a meeting or courtroom. For courtroom work, the tablet can be used to access exhibits, pleadings, and accompanying material. There are trial presentation apps now that make it easy to display those exhibits wired or wirelessly to projectors or monitors in the courtroom. For the mobile lawyer, the iPad, via dozens of apps, provides access to nearly every cloud storage service (Dropbox, Box, ShareFile, etc.) and every legal document management solution (Worldox, NetDocs, iManage and OpenText).

In my humble opinion, the reason why iPads are rapidly catching on with trial lawyers is that a laptop, netbook or even the "traditional" convertible tablet PCs are useful at counsel table, but cannot be carried in the courtroom easily when the lawyer is standing at the podium or addressing the jury. The reason it is so successful among other mobile lawyers is because of quick access to client/matter documents, and apps to edit those documents. Essentially, the iPad is just a little heavier than a paper legal pad in a holder and not nearly as heavy as the lightest netbook or laptop.

As one example, a lawyer, simply cannot question those in a jury pool while keyboarding their responses into a traditional computer. There's probably no surer way to get jurors to clam up and to give them the impression that the lawyer is transcribing their personal information. (This is true even though the court reporter may be quietly transcribing it in many cases.)

Below is a quick summary of apps and ways that a road warrior lawyer would benefit by using an iPad.

### Accessing Documents from an iPad

If you have a legal document management system (software), you should look into adding whatever necessary component so you can access those documents from a mobile device (not just an iPad) so you do not have to wrestle with sending those documents to another program or service like Dropbox, Box, etc. Check with your vendor/consultant to see what it would cost to add the necessary component to Worldox, iManage or OpenText. If you use NetDocs, since it is natively cloud-based, you don't need to buy anything extra. You just need to download the apps and your credentials to log in. If you do not have a document management system, you will need a cloud service like Dropbox, Box, Citrix ShareFile, Spideroak, etc. and transfer documents into those services to give you easy access to the client/matter documents. If you need to add your own encryption key to secure the documents within those services, Spideroak already provides that, but you will need a solution like Sookasa, Boxcryptor or Viivo to layer over top of Dropbox or Box.

### PDFing from an iPad

To edit, annotate or sign PDFs, I recommend one of the following apps: [PDF Expert](#), [GoodReader](#), or [iAnnotate](#).

### Editing Word, Excel, PowerPoint from an iPad

Without question, bite the bullet and subscribe to Office 365 so you can install and use the full version of Word, Excel, and PowerPoint on the iPad. There is nothing worse than converting a Word document to another format and losing valuable formatting. I would also strongly recommend an external keyboard case for your iPad if you plan on drafting or editing anything longer than a few sentences. I love [Apple's keyboard](#) because it adds virtually no bulk to the already sleek and light device. If you don't mind bulk and want more protection (from elements and accidental dropping), consider the Logitech CREATE case. Turn your iPad Pro into a laptop with the new [Brydge keyboard](#).

### Scanning Paper Documents from an iPad

Don't even carry around an external scanner. Load [ScannerPro](#) or [Scanbot](#) on your iPad or iPhone and simply "scan" the paper using the device camera to quickly and easily create multi-page text searchable PDFs that you can email to automatically save to Dropbox or Box.

### Notetaking from an iPad

Without question, the most natural way to take handwritten notes on the iPad is a combination on the iPadPro 12.9 inch, Apple Pencil and a killer app called [Notability](#). I no longer carry legal pads around. I find it far easier to use my iPad to take all notes. In other words, anytime previously that I grabbed a yellow legal pad, instead I grab my iPad. The result is a PDF that I save into the client/matter file in our document management system. Notability also gives you the flexibility to markup PDFs (seminar materials, pdfs people email you, etc.), type, annotate, and best of all audio record interviews or lectures as you take notes. The audio file is then synchronized with the paragraphs in your notes so you can click inside the paragraph and hit play to automatically go to the recording that occurred when you typed that paragraph.

### Litigation with an iPad

Two apps in particular have made a tremendous impact in the world of mobile litigating: [TranscriptPad](#) and [TrialPad](#). From the makers of TrialPad, Ian O'Flaherty and Saurian software have knocked it out of the park.

TranscriptPad has the capability of searching across an entire case, one transcript, color code your issues, highlight, underline, bookmark and assigning an 'issue code' if you do that sort of thing.

TranscriptPad does 2 core things very well: (1) allow you to carry in a single iPad with all your depositions instead of bankers' boxes full of paper, and (2) issue code depositions and create easy reports based on the issue coding.

TrialPad is a legal document/exhibit management and presentation tool developed for the legal profession for use in the courtroom. Despite its intended use in the courtroom, TrialPad is being used for client presentations, and many law professors use it to display documents in lectured. Using TrialPad you can organize, manage, annotate, and store your documents and video while leveraging the portability of your iPad. TrialPad was designed by professional trial consultants who have helped lawyers present at trial. Unlike PDF readers, it lets you create separate case folders, organize and sort important documents, and dynamically annotate and present them via its flexible output options.

The key differentiator of TrialPad over programs like PowerPoint or Keynote is the presenter's ability to pull documents, images and video on the fly in any order - jump around - and then zoom, magnify or annotate on the fly. It is not really a competitor to PowerPoint or Keynote because it was designed to handle different situations. Keynote & PowerPoint is designed for more rehearsed linear situations (opening and closing), where TrialPad is design for more spontaneous situations like witness examination.

The third product in the Saurian line is relatively new. [DocReviewPad](#) is great for appellate lawyers who need to review the full range of trial court documents, from motions to briefs to trial transcripts supplied to the lawyer in PDF format. It also works for trial court litigators who have to review documents provided to them in formats other than the deposition file format that works so well in TranscriptPad.

### Wrapping Up

In conclusion, whatever apps you select, one thing is clear - you definitely can stay far more paperless today when you are out of your office and on the road if you have an iPad! Happy iPadding!

### Blog Topics

- [Technology Tips](#)
- [Strategic Management and C...](#)
- [Time, Billing, Accounting](#)
- [Speech Solutions](#)
- [Litigation and Presentation S...](#)
- [Document Management](#)
- [Training and Speaking](#)
- [Practice Management](#)
- [Document Automation](#)
- [Hardware and Networking](#)
- [In the News](#)
- [Affinity Newsletters](#)
- [Worldox Newsletter Archive](#)
- [MacCorner](#)