

**Group Legal Services Association
Solo, Small Firm, and General Practice Section
2014 Annual Conference
May 1-3, 2014, Las Vegas, Nevada**

**How to Use Legal iPad and iPhone Apps to
Be More Efficient**

Friday, May 2

10:20 am - 11:20 am

Presenter: Phillip Aurbach, Marquis Aurbach Coffing



Philip Aurbach

Mr. Aurbach concentrates his efforts on commercial litigation relating to real estate, contracts and partnership/corporate disputes including receivership, fiduciary duty and dissolution cases. His practice, to a lesser degree, has focused on arbitration and mediation solutions for over 20 years. After growing up in Las Vegas, Mr. Aurbach graduated from Western Kentucky University in 1973 in Business Administration with a Finance emphasis. Mr. Aurbach then attended University of San Diego School of Law and graduated in 1977 after serving as the Research Editor of the San Diego Law Review.

How to Use Legal iPad and iPhone apps to be More Efficient.

In the past two years, the use of iPhones and iPads has skyrocketed. It is estimated that in 2013 over 400,000 attorneys use iPads.

You can be more efficient with an iPhone or iPad. Unfortunately, it takes time to find the appropriate app, learn how to use it and then adapt it to your needs. The following apps can help you become more efficient. However, if you are like many lawyers, you are always balancing your time between **accomplishing something vs. planning to accomplish something**. Just like a house painter who doesn't prepare to paint by sanding, masking, and mixing the paint will undoubtedly have a poor outcome. Lawyers who have saved and organized forms and briefs will be much more efficient than those who don't. However, a lawyer who spends too much time saving and organizing forms instead of billing clients will face a new chapter in his or her life—Chapter 7.

Make no mistake, these efficiency tips come with a price—you will need to spend some time learning the software to be more efficient, but the planning pays off. Incredible things can be created with your computer, iPhone, and iPad. I hope to stimulate your curiosity and creativity.

1—**Where to Keep Client Documents, Exhibit, Depositions, etc.** There are three very good programs for file storage: a) [Dropbox.com](https://www.dropbox.com), b) [Box.com](https://www.box.com), and c) [Google Docs](https://docs.google.com).

Dropbox is my most used app/program. Dropbox is simple. It works on Macs, iPhones, iPads, Android systems, and Windows. Between the time I turned this document into the ABA for publication and the day of the seminar, I may have made changes. You can access the latest draft by typing this link into your browser (Internet Explorer, Safari, or my favorite, Chrome):

<https://www.dropbox.com/s/xy15pfz3ixh0urr/efficient%20apps.pdf>

This document should open on your computer. The underlined blue words are hyperlinks. Click on a hyperlink and you will be taken to appropriate internet web pages to give you more information or a video. **This document is stored in my Dropbox account.** This account stores files for me on an Internet site (i.e., the cloud) and the files are automatically duplicated on my laptop, my work desktop and also on my iPhone or iPad. The beauty of this program is that 1) the files are in folders just like they exist on your computer, and 2) the files all automatically sync, i.e., stay identical—a change in one automatically changes the same file on your other computers or iPads. So, if I am at work and I pull up a document I have in Dropbox, when I save it, that document is saved everywhere. One very useful reason to send a link to a file is to send clients files that are too big to send by email. Dropbox has [instructions](#) to guide you through the process of sending a link. The person that receives the email with a link does not need to own a Drobox account to download the file. There is a problem if the file contains attorney/client information and the link is sent to the wrong email address, i.e., to a nonclient. However,

encryption is the topic for another discussion.

When you have documents or exhibits for a motion or a trial, the old way was to lug around multiple banker's boxes. Now, all of the documents can be taken to court on your iPad. All you need to do is save them to your Dropbox folder on your computer. It is as easy as saving them to a folder on your hard drive.

2—Opening and PDF'ing your files. Once the files are in Dropbox, you can open the document in Dropbox on your iPad. However, there are several programs which can access the files, edit the files and email the files. [Goodreader](#) is my favorite and [PDF Expert 5](#) is my second favorite. Here is a [video](#) that shows you how to use Goodreader.

Here is what you can do on any pdf file (contract, will, deposition) with the proper PDF program:


- a. Bookmark pages in a pdf document. If you use sticky notes on the edge of pages of a contract, deposition, exhibit, you will like bookmarks. Like sticky notes, a bookmark allows you to go directly to a particular page in a pdf file. allows you to
- b. Stamp (Admit, Deny, Deny because of lack of information and belief) each paragraph in your Complaint as you read your opponent's Answer. I have linked to a [folder](#) that contains these stamps. If you save them to the correct place on your computer, Goodreader, PDF Expert, and Adobe Reader can add them to a pdf document as a "stamp."
- c.
- b. Redact or highlight portions of a pdf document depending on what color you use).
- c. Use an arrow to point out words.
- d. Use notes, that expand to give you much more information.
- e. Although I use my computer to accomplish this trick, you can add audio and video to a pdf file.

DNIB 7. This Court has personal jurisdiction over Defendants because all Defendants
20 | reside either in the State of Nevada, are created in the State of Nevada, or are situs in the State
21 | of Nevada.

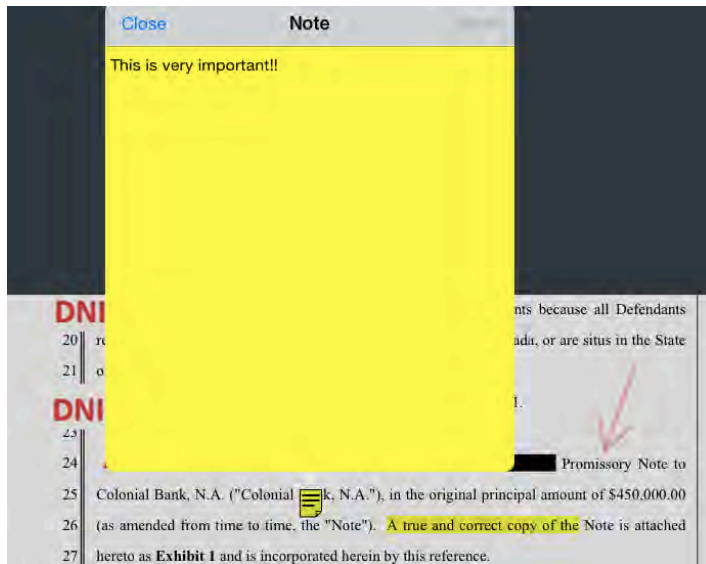
DNIB 8. Venue is proper in this Court under 28 U.S.C. § 1391.

23 | **GENERAL ALLEGATIONS**

24 | **A** 9. [REDACTED] Promissory Note to
25 | Colonial Bank, N.A. ("Colonial [REDACTED] k, N.A."), in the original principal amount of \$450,000.00
26 | (as amended from time to time, the "Note"). A true and correct copy of the Note is attached
27 | hereto as **Exhibit 1** and is incorporated herein by this reference.



This is what it looks like when the little note is expanded:



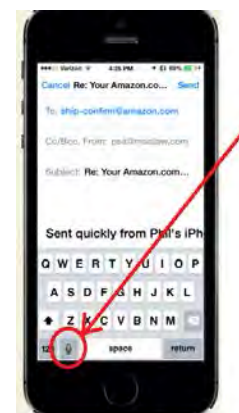
3—[Evernote](#). Evernote is a cool program that puts your notes in one place instead of lost on a hard drive. It allows you to “clip” portions of a website and put that picture in your notes. It allows you to collaborate by allowing two people access to the same note e.g., a list of things to do, shared with a client, or a grocery list shared with a spouse. You can also tag each note with a word. This allows you to do a word search and all notes that you have “tagged” with that word will be listed on your screen. [Bubble Browser](#) is an app that allows you a unique visual view of all notes that contain the word you used as a tag.

4—[Circus Ponies](#). This program can be your trial notebook. I have tried it and it is a valuable tool. It costs \$29 and I didn’t use it as much as I thought I would, but it is definitely an app to consider.

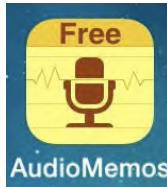
5—Dictation

a) Dictation to Text. Record your voice and translate it to text.

One program is [Dragon Dictation](#). I don’t find Dragon Dictation as accurate as using the microphone button next to the space bar on your iPhone. It appears when replying to email or text. The length of the recording is short so you may have to click on the microphone several times if your message is long.



b) Dictation to Audio—Record your voice and save it or email it as an audio file. One of the many apps that allows your iPhone to record like a pocket



recorder is [Audio Memos](#). This program automatically gives your voice recording a title—today’s date and time. However, it does not easily fill in the email address of the person to whom you want to send the audio file i.e., your secretary to have it typed into a memo or letter. There is an app that is



already on your iPhone. It is called Voice Memo. This app does an adequate job of recording conversations or dictation. However, it does not provide today's date and time as a title for each voice memo, but it is easier to send it by email to someone in your contacts (address book).

6—Creating and Editing Documents. I prefer to create documents on my laptop. There are some good Bluetooth keyboards for the iPad – many of which fold over the iPad and act as a cover when not in use. If you want to create and edit documents on your iPad, here are some of the apps to help:

- a) Microsoft [Word](#), [Excel](#), and [PowerPoint](#). These require a \$99/yr subscription to 365 Office. Here is an [article](#) with more information regarding using Word.
- b) Apple [Pages](#), [Numbers](#), [Keynote](#). These are about \$10 each. They are great if you use Apple word processing, spreadsheets and presentations.
- c) Others: [Documents Free](#) and [Documents Unlimited Suite](#),

7—Hand Write Notes on an iPad. There are programs that let you write directly on your iPad. These usually require a stylus and are not quite as good as paper and pen—yet: a) [Bamboo Paper](#), b) [Notability](#), c) [Penultimate](#).

8—Scanning Documents. If you have a document that you need to email one or two pages to someone, you could use your phone’s camera. The picture is stored in Photos on your iPhone in a jpg format. It is easy to send that picture via text or email. If you want to mark up the document before you send it, one very easy program is [Simple Marks](#). This app allows you to easily draw lines and insert text on the picture. Also, [Paper Notes](#). Is a very good scan-to-PDF app. You take a picture of the document, the app saves it as a pdf file and allows you to easily email it to someone.

9—Witness testifying by FaceTime. If a witness is out of state, instead of reading their deposition at trial or playing their video deposition, there is a way they can use their iPhone and you use your iPad at trial. Have the witness call the iPad via FaceTime. The Witness is sworn in and testifies “real time.” A fellow lawyer needed a witness for a hearing, but the witness had been deported to the Philippines. The family court judge allowed the testimony.

10—[Mikogo](#). Once you learn this program, you will use it weekly. It allows you to send an email to, for example, a client. The client opens the email, clicks on a link and sees your computer screen—as if the client was standing over your shoulder. You get the client on the phone, bring up interrogatories on your computer, then you type in the answers as you and the client discuss them.

11—**Misc.** Check out these other great tools:

Want to preserve text messages? On the iPhone you can save a screenshot as a photo by pressing the home button and the lock button at the same time. A more expensive way is [iExplorer](#) which will, among other things, export messages and voicemail from an iPhone and save them to your computer.

How to [Sign pdf documents](#).

How to [videoconference](#) for free.

How to record what is on your computer screen (windows): [screen recorder](#). This is useful if you want to show someone what is happening on your screen.

How to record what is on your computer screen (mac). Go to File, Applications, QuicktimePlayer, click on New Screen [recorder](#).

Here is a video showing you how to use [bookmarks](#) in Adobe documents.

[Remote desktop](#). This app turns your iPad or iPhone into a remote desktop. It connects to your desktop computer through the Internet. What you see on your iPad or iPhone is your Windows computer screen. This is almost as good as sitting in front of your desktop monitor.