APP SYNERGY IN LAW PRACTICE
or How to Integrate an
iDevice Into Your Law Practice

by George White LawOfficeofGeorgeWhite.com

Have you ever attended a CLE on how to use apps in your practice? Maybe you arrive, excited to learn something, and then wind up confused as to how to implement the software, or the software you hear about isn't really pertinent? I've been there. If I am lucky I walk away with one or two tidbits relevant to my work. This piece intends to take a deeper look into how to fully integrate mobile applications to actually help you in your practice.

I'm George White, a 37-year trial lawyer with a family and criminal practice in Irving. Until a year ago I was an iDummy. I had never owned an iPhone, iPod, or iPad and I looked on with amazement at those that would extoll the virtues of such devices. I told myself, "I don't need all that." Sound familiar? How many of us have said exactly that to the young new lawyers that have all the gadgets? Well, for the record: I was wrong.

There ARE aids out there that can make our lives easier. With them we can do what we do faster, easier, and with higher quality. Let me bring you up to speed and take you on my journey to electronic bliss.

We all have been to seminars where in 30 or 60 minutes a lawyer covers 60 apps and a dozen concepts. Afterwards, we have a headache and very little else that sticks with us. If we leave with one new idea we feel good – like we have succeeded. But going to a seminar like that just once a year is not enough; we're left behind before we even get on board. Not to mention the fact that we can never seem to get someone to explain everything in terms we understand.

Remember the commercial, "If I can do it, anyone can." I discovered that's true, but only if someone explains it in a way I can understand. I have always liked articles that included pictures of the steps involved. This *Bulletin* probably does not have enough space but I will set up a portion of my website where the article is reprinted and has photos of steps, screens, and products. Between those two resources, you, your secretary / paralegal, and your partners should be able to get on the same page. And of course you can access my website from anywhere. (I always put the *Bulletin* away, then forget about what's in it.) You can bookmark the website,

read the article at your leisure, refer back to it, show it to your new secretary or associate, and get up to speed quickly.

You can't escape Apple's iPad/iPhone, so you might as well learn to use them. There are Android apps that do the same things as the iPad/iPhone versions, so if a particular app has a counterpart I will endeavor to tell you. As I said, until last year, I only accessed the Internet from my desktop with Windows XP. I now also use a Windows 7 computer and an iPad3. Many apps have desktop equivalents that can sync with the iPad/iPhone version or some ability to interface with existing desktop programs. We need this since most of us still do the bulk of our work on the desktop, often in a network environment. The iPad/iPhone can be integrated into this environment to work together. Integration is an area largely ignored by the speakers I have heard. We need to have that integration; otherwise, the iPad/iPhone has limited usage – or is just a toy.

Mechanical integration. It's a fancy term for the systems that work for us, keeping our files and documents straight. Most are manual, with some sort of storage like a hard copy file, an electronic server, or hard disk. We also have input devices – another fancy term that for many of us means "secretaries." An iPad in this case is nothing more than a fancy computer -- one with limitless flexible uses -- one that works differently but has enough similarity to what we use for most of us to feel comfortable. It's limitless because the only limit is your imagination in how to use it for a particular task.

The iPad has completely changed the way we interact with our computers. The days of only using a keyboard to input data will soon give way to a swipe here and a pinch there. With the introduction of Siri, Apple's voice-operated software,

we can expect further dissolution of traditional computer input devices. (Sounds like *Star Trek*, doesn't it?) I am typing this article on a Bluetooth keyboard. Yes, I have had one for years on my XP, but the iPad adds a new twist. On the bottom row of keys there is a microphone key. I could push it and just dictate this article. Did we have it before? Sure, the dictaphone. With Dragon software, naturally speaking. This is just an easier, faster, efficient, and fancier way.

You have heard the phrase of this latest generation: "There's an app for that." It's true. You need only think of what you want to do, then research a bit and you will probably find an app that does it now or will very soon. And for us cheapskates who remember the large amount of funds we dedicated for upgrades of software in the past, let me point out that many apps are free or just $.99. So with that in mind let's think of integration, or as I like to put it: Synergy.

Synergy is making the new and old work together for smoother, more efficient, better-quality work to give the lawyer more quality time. You can do it now by merging the iPad and its apps with the current system you presently have for that purpose. Email is just one area that the iPad can help you with.

All of us have to deal with tons of emails. All of us have desktops. Whether we use Gmail, AOL, whatever, the desktop has a certain speed. It never seems fast enough, but the iPad is. I open my emails on my iPad, in front of my desktop. Why? It's fast. The time it takes to get to the desktop screen, to open the email, to read, to delete, to send to storage, to respond is so much faster with the iPad than a desktop. The screen is also closer to my eyes so I see it better. I can process the information faster. I can take a document directly to my secretary to look at instead of waiting while she pulls it up on her computer… with me standing nearby, annoying her.

On our desktops when we have deleted the junk mail, and read the email, what now? Well, it depends: what do you want to do with it? Some we don't need to keep. We leave or delete them. Others we need to keep with our clients' files. As it is now, you likely print them out on the printer attached to your desktop and give them to your secretary to file in the hard file. There are not many apps (in Windows we'd call them programs) that allow us to save the email in an electronic file with other documents. Outlook lets us create a file and somewhat allows automatic filing (under strict rules), but still it's not in my ProDoc file. Most of us use ProDoc or something similar. Some lawyers copy the email, paste it to a page in Word or WordPerfect, and then save the page as a document. Ugh – that's clumsy and time-consuming.

Now that we narrowed down the mass to what we need to keep, how do we quickly finish up? That's where the apps come in. And we have many choices. There will be one that YOU will feel comfortable with. That's the key. Find one you like. Mine are not the only answer, only places to start.

Try using a program like Evernote. Evernote started out as a note-taking program. It still is. But its abilities allow it other uses -- ones that work for our needs. Making abilities work for us. Remember: limitless flexibility.

First, it's FREE. I like that word. Warning: Evernote has a huge learning curve, much like Word did when we started. But once you get through that curve and the app is working for you, here is what you find and can do with it. It's universal or "cross-platform." Fancy words again. Simply put, you can use the same program on any computer or phone, Windows, Mac or Android. *The same program.* You put something in from one computer and it appears on all. Sync-ability automatically, or not, your choice.

So you could forward the email from your iPad quickly to your Evernote account, label it in the subject blank to a file associated with the client, marked as email with the date or other identifier (however you mark your docs for easy finding) and it goes directly to that place in Evernote. You could have an electronic file identical to one on your hard drive in your server or desktop. Now it's in a place you or your secretary could always get it immediately.

There are other ways to save the emails to even your iPad. Since you can put Evernote on the iPad you push your finger on the email, your iPad will ask if you want to copy. It allows you to select all or part with a touch. The iPad started a new way to do things. The advent of gesture-based actions has revolutionized the field. Pinch your fingers to make it smaller on the screen, swipe right or left to change the page, push the screen to make something happen. These actions were normal to the new generation, not to me. Continuing, select all so you want to save, get the header etc, and copy. It goes to the clipboard. Open Evernote, new note, paste, label and done.

Now open a program like PrinterPro by Readdle. It has a clipboard reading function also. Push the clipboard label on the app and there it is. Push print and you can print it to any computer on your network, whether an air printer or not. Now you can add a printed copy to your paper file.

Open it in another program that lets you save on your iPad in a file tree system like Windows. There are many that can do this. One is PDF Expert. But PDF Expert has another facility that gives it an advantage over others. PDF Expert can mount as another drive to your desktop computer and ergo your server, if you have one. Long story short: you can see what's in PDF Expert on your iPad like an external drive, wirelessly, while working on your Windows desktop and drag and drop it to the Windows client's file on your computer or server.

Now you've printed it for your files, kept it on your iPad (which is always with you), and put it on the server with the rest of the client's file. If you don't use a server, then it can be wherever you keep the documents you created for the client. Some of you use offsite cloud storage like Dropbox or Boxnet. Cloud storage is simply a fancy term for a hard drive

off premises accessed through the internet (the cloud).

The more things an app does that you need, the less apps you need, and the more time you save. That's why I like PDF Expert. It allows you to annotate the email (or PDF, and anything in it) add text, notes or highlights and even fill in blanks on forms or add a signature. It has a deep search function so you can find just the one email or document you want without knowing the date or label. Just know a word in it and it will find it, tell you where, and take you to it, highlighting the word. And it's quick. Handy little program.

So you can save the original everywhere. Search to find the one you need. Mark up a copy with instructions to send to your secretary. Again, making time work for you. And all while your watching your favorite show or lounging on your patio.

Did a bell just go off? Yes, you can do that with more than just emails. Any PDF made from whatever source, documents, photos, whatever.

Emails are no longer a lost or clunky item to deal with. They should be either in your file, on your computer, or iPad. Now you can use or find them quickly and easily. Especially when you get that call from a client at home telling you he sent some information to you by email and has not heard from you. You don't remember it. Within seconds you can find it, if there, or you will know to tell him, "You just thought you sent it. Try again and call me in the morning."

My email box gets about a hundred or more emails per day. Most are junk as I have not found a good spam filter for us individuals yet. I envy those large firms with those great spam filters on their system. However, the iPad and two programs will allow you to optimize the time you do spend on emails.

First, when we respond we always end with a valediction—a fancy word for "closing." We all use one, usually it's your name/addresss/phone/etc. And all of us have something like this for important emails:

This email message and any attachments are for the sole use of the intended recipient(s). Any unauthorized review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender by reply email and destroy all copies of the original message and any attachments.

We all know computers have clipboard functions. That's where we copy something and paste it somewhere else. We are used to that in Word or WordPerfect.

Imagine you get an email, you push "reply," and the computer opens a reply email. You fill in the subject and type your response. In the iPad double-click the button at the bottom and it opens up a bar with programs currently open. Click on the Clipboard App and find the phrase,

picture, or URL you want in your email and touch it. It's automatically in the clipboard. Double-click the bottom button again. Your email program will be on your left in the bar; touch it and you're back to where you started in the email. Push and hold where you want the item copied on the clipboard inserted and the choice to paste comes up. Push "paste" and—zip!— it's there. Nine total pushes and maybe 5 seconds. Repeat for any additional inserts. Clipboard has separate sections for text, images, and URLs for those pesky URLs you always mistype. Plus, Clipboard also copies to its program whatever was on the clipboard when you open Clipboard. An easy way to load the program. Or you can type right into a screen in the program what you want remembered. I guarantee it will save you time.

Now for the other solution. You get an email and don't have time to respond right then or want to give it some thought. You forward it to your secretary to handle and are going to follow up when you get in or have time. How often do you forget to do exactly that? Usually I remember later that day on my last cup of coffee or when my secretary is leaving, only to have to remember to follow up again the next day. "Sorry, I have to go, I will get to it first thing tomorrow." Sound familiar? Well, another nifty service can help; Nudgemail. And it's not even something you have to download. Just try this!

When you get that email on your phone, iPad, desktop, or whatever device, and you think to yourself, "I don't have time now but I will when i get to the office" or "I will have time in an hour or I want to see it first thing in the morning," Nudgemail will resend the email to you. No registration, sign up, or anything—and it's free. (The program is still in Beta but has been for a long while). Just click "forward," type in the forward "TO: slot 1hr@nudgemail.com" or "tomorrow@ nudgemail.com" or whenever you want to see the email again and send. BAM! It's done. It will reappear in your emails at the appointed time or day. Quick and easy. After you use it once, Nudgemail will send you instructions to program Nudgemail to deliver all forwards labeled "tomorrow" at a specific time or just put in the date and time you desire. How easy is that?

Between these two solutions a lot of your work can be easier, stay on schedule, and look more professional. Take a little time to discover this "electronic bliss" and you'll be glad you did. Spend more time with your spouse and kids -- or in my case, ride the Hill country on my Harley.

Feel free to email me at GWhitepc@aol.com with your suggestions, questions, comments, complaints, or kudos. ■

GEORGE WHITE *has been assisting clients for more than 35 years in the areas of family law, criminal law, and wills & probate. He has completed over 7500 cases since 1980, with 85% of his busines coming from referrals.*