All in the Family: Seamless Workflows from Mac to iOS

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Introduction

Once upon a time, we had computers (laptops & desktops) ... and we had mobile phones. The computers didn't talk to the mobile devices, but they usually sat on the desk next to each other. Sometimes we would join them together via a USB cable so they could share some dribbles of information with each other.

Many of us longed for our computers and mobile devices to get to know each other a little more. We wanted them to be friends, and share all kinds of information with each other like the BFFs we knew they could be.

But no matter what we tried, the connection just didn't seem to be there. We were hurt, frustrated, and frankly felt a little rejected. What we really wanted was the easy, seamless ability to work wherever we were, without any limitations.

Then along came Apple - a company that developed wonderful laptops and desktops, and then the magnificent iPhone and the delightful iPad. We wanted our Mac computers to talk nicely with our iOS devices, and Apple listened.

It's no longer a fairytale - we really can do just about everything we need to do from any place, on any computer or device. And this is especially true with Apple ecosystem with our Macs, iOS devices, and Apple Watches. One of the reasons that it all works is because Apple controls the hardware, software, and services that all of the devices connect to. Apple has developed an effective ecosystem that enables us to share information easily between our Mac computers, iOS devices, Apple Watches, and even extending out of the bubble to Windows PCs.

But you're not limited to Apple services such as iCloud. There are other platforms that we can utilize such as Dropbox, Box, Google (Drive, Docs, etc.), and Microsoft Office 365. The idea is to find a system that works for you and your practice, so that you can get your work done from wherever you're located.
iCloud

One of the primary methods to share information and workflows between your Mac computers, iOS devices, and Windows PCs is Apple's service called iCloud.

As described by Apple, "iCloud securely and safely stores your photos, videos, documents, apps, and more - and keeps them updated across all your devices. So you always have access to what you want, whenever you want it."

There are several layers to the iCloud service and it frankly is a little difficult to define the service in a few words.

First, iCloud is the backend service for the @icloud.com email, calendar, and contacts. As long as you have an Apple ID, you have access to a free @icloud.com email address, a calendar that can be shared with others, and a contacts app that will easily sync between your Mac computers in iOS devices.

Second, iCloud is a syncing service for your photo library. You can take a picture on your iPhone or iPad, and go back to your Mac at home, pull up the Photos app, and all of those photos will be synced to your computer as well. This is great since you effectively have a backup of all your photos when you lose your iPhone (it happens to all of us). All of your photos are safely stored in iCloud so they can be accessed from another computer or mobile device.
Next, iCloud is a one of the best methods for backing up and restoring information from/to your iOS devices should they be lost or stolen. The iCloud back up service can run every night on your iPhone and iPad so that you have peace of mind all that information is secure.

Along the same lines on the security aspect, iCloud also powers the "Find my iPhone" service. When (not if) your Apple devices are lost or stolen, you can log on to any computer connected to the Internet and visit www.icloud.com and located your lost or stolen devices on a map.

Lastly, iCloud can act as a simple cloud-based storage service similar to Dropbox or Box. This is evolving now even with iOS 11. iCloud now offers the Files app in iOS 11 where you can store and access all of your files both on your computer and iOS devices.

Along those lines, the iCloud storage service can be used as a backend syncing solution for other apps such as 1Password, Notability, GoodNotes, PDFpen, and many others - you can seamlessly work back-and-forth between your iOS devices on your Mac computers on files created in these apps and access them easily. You can pick up your work from where you left off because the iCloud service is syncing everything in the backend.

There are several other fantastic advantages and features of using iCloud, which are all based on your Apple ID including:

- Syncing your notes in the notes app between your iOS devices and your Mac computers
- Syncing reminders in the reminders app between your iOS devices and your Mac computers
- Syncing your "keychain" for logins and passwords
- Accessing open Safari tabs from your Mac on your iOS device and vice versa
Continuity and Operating System-Based Sharing

One of the advantages of using the Apple hardware is the fact that you have one manufacturer putting together the operating system and the hardware. As a result, they can introduce software-based features that make the hardware even easier to use. A good example of this for people that want to use both iOS and the Mac is **Continuity**.

Continuity allows you to handoff work from one device to the other with minimum friction. If you're writing an email on your Mac and then switch over to your iPhone or your iPad, you simply need to tap on an icon, and you can continue where you left off. The way in which Apple implemented Continuity is particularly clever. It does not require that you be connected to the same Wi-Fi network. Instead, it uses a combination of Wi-Fi and Bluetooth to establish its connection between devices.

![All your devices. One seamless experience.](image)

Continuity doesn't just work with the native Apple applications. Enterprising third-party developers can also incorporate this feature into their application. Many of the applications covered in the session include continuity-based sharing between ILS and Mac devices.

This idea of handing off information between devices isn't just limited to application data. Apple also makes it easy to share Wi-Fi passwords, clipboard contents, and even cellular phone calls between devices. Usually, there's nothing for the user to do but pick up the other device and follow a prompt.
File Management

One of the foremost needs that lawyers have when they’re on the go is being able to access their files and documents. How can we take files with us when we leave the office? Before the iPhone and iPad, we just printed everything out, stuffed it all into a manila folder and shoved it into our already overstuffed briefcase.

But what if we didn't have to print anything? After all, these files are ALREADY in digital format, and we're making an extra copy in print form. Plus when they're printed, we can't search the text. Why can't we just leave them in digital format so we can access, organize, and search them like we do on our computer? That's exactly what we can do today, and the iPhone and iPad make it easier than ever before.

There are three methods for getting files from your computer over to your iPhone or iPad:

1) First, you could simply email yourself a document from your Mac computer and then pick up the email attachment on your iOS device. There are several limitations for this method but it does work and we're all comfortable using email.

2) Second, you can use the iTunes software running on your Mac to copy files from your computer over to your iPhone or iPad ... or the other way around. You physically connect your iPhone or iPad to your Mac computer with a USB cable (although this could also be done over wi-fi). Then on your computer in the iTunes software, click on the "Apps" tab and find the app in the list that you want to copy file into on your iOS device.

3) The last method is what we would recommend - using a cloud-based storage service. There are several to choose from, including Apple's own iCloud drive, but we historically see that Dropbox works the best. It's the easiest and most intuitive service to use, and it just seems to work the best compared to all of the other services.

Dropbox

Using a cloud-based storage service such as Dropbox gives you the most freedom and flexibility to be able to access your files and documents when you’re away from your office.

To use Dropbox, just make sure that you copy the files that you’ll need into the Dropbox folder on your computer before you leave the office. This may sound like an extra step, but before you had an iPhone or iPad, you had to take the time to
print everything before you left the office. Now, we’re just ensuring that the documents on your Mac are located in the Dropbox folder so that they automatically upload to the Dropbox server, and allows them to be accessible from your iPhone or iPad.

Now when you leave your office, you can open the free Dropbox app on your iPhone or iPad and you will see all of the files exactly as you stored and organized them in the Dropbox folder on your Mac.

In the Dropbox iOS app, you can toggle a file as "Make Available Offline" which basically makes a local copy of the file down to your iPhone or iPad so that it can be accessed without a connection to the Internet. This is extremely important if you know that you're going to be located in a place where there is no connection to the Internet, or you'll only have a weak connection.

An even better option is to use a file management app such as GoodReader or PDF Expert. Even though PDF Expert has a primary focus on PDF files (as per their name), both PDF Expert and GoodReader can manage and organize all types of files including Microsoft Word documents, images, videos, PDFs, audio files, and really anything else that you'd want to access from your iPhone or iPad.

You can access your Dropbox account from inside PDF Expert, in much the same way that you would access your Dropbox account from the Dropbox app. Once you link to your Dropbox account from inside PDF Expert, you can navigate your files in Dropbox and then download the files you need right inside PDF Expert.

One step better is to use the "Sync Folders" inside PDF Expert. Just find the folder inside Dropbox that you would need when you're out of the office, and "Sync" that folder inside PDF Expert. The PDF Expert will make a local copy of that Dropbox folder on to your iPhone or iPad so that way you have complete access to that folder, almost like if you had printed everything out and carried it in a manila folder in your briefcase … it's just in your iPad instead.

But since this folder is syncing with your Dropbox account, if you make any changes to the files in that folder (e.g. annotate a PDF, highlight some text, etc.) or if you add a file to that folder in PDF Expert, all of those changes and files will sync back to your Dropbox account. So when you get back to your office and your Mac, all of those files will be there waiting for you.

This is a fluid and seamless way to work on files from your Mac or your iPad or iPhone, and ensure that all of the information is synchronized regardless of which device or computer you’re working from.
PDF Workflows

When we specifically talk about PDF workflows, we're going to recommend the exact same set up. PDF expert is one of the best apps for highlighting, and annotating, and marking up PDF files so it makes complete sense that this is your best option for annotating and highlighting PDF files while you're on the go.

For example, once upon a time when I needed to mark up a law review article or a case opinion, I would print them all out, kill several trees, and then I had a small pencil bag of different colored pens and pencils and highlighters that I would use to mark up the physical documents that I had printed out.

Today, I bypass the printer completely and simply download the PDFs of the information I want to read and put them into a Dropbox folder and then sync the folder with PDF Expert. When I leave the office or hop on a plane, I simply pull up those files in PDF Expert and start marking them up. I can even use multiple colors to highlight different passages so that everything looks exactly the way that I used to do it in a manual fashion.

Because I've synced the Dropbox from inside PDF Expert, I have the confidence that all of my markups and highlights and annotations are going to be synced back to Dropbox and my folder on the Mac. So when I get back to the office, I can access the file in all its marked-up glory.

Mind Mapping

Most lawyers would agree that the primary thing they're getting paid for is thinking. That thinking often results in written documents and oral arguments but, fundamentally, it is in the space between our two ears that really pay for our shoes. There are tools to help you with that.

Mind mapping and outlining our two software tools that can make a significant difference in the "thinking" part of the job.

A mind map is a diagram that allows you to visually organize ideas and thoughts. They are generally hierarchical but also a bit anarchical. My maps have branches heading out in every direction and often illustrate the thought process along with the thoughts that go with them. Major ideas are connected directly to the central concept another ideas branch out from those. Mind mapping has really become popular over the last 20 years. Lawyers and just about everybody else likes the way it allows you to use free Association while planning out projects and ideas. One potential workflow with mind maps is to spend little bursts of time with them
over an extended period of time as I develop a new project. Having the ability to open my iPhone or my iPad and add little bits to a mind map without manually syncing is golden.

There are several powerful applications that allow you to mind map both on your iPad and iPhone as well as your Mac.

**MindNode**

MindNode is the starting place if you want to learn how to mind map. The application features a simple and elegant design and has just enough tools to get my mapping done but not so many that it becomes overwhelming.

MindNode has features (like the ability to hit the space bar three times for a child node or the return key three times for sibling node) that make data entry very quick and I found myself easily creating complex mind maps using MindNode with very little difficulty. The most recent version, MindNode has added the ability just to display your mind map information as an outline. Outlines, covered in a later chapter, are the natural progression from a mind map and it is nice being able to see your data portrayed in this manner right in your mind mapping application.

MindNode also syncs your data with iCloud making it easy to access your data on a Mac, iPhone, or iPad with no friction. This may be the application's killer feature.

**iThoughts**

If MindNode is not powerful enough for you, you are going to want iThoughts. iThoughts is probably the most powerful mind mapping application on the iPad. It includes a great deal more customization and functions then you will find in most mind mapping applications. It gives you extensive controls over how the mind map appears and what colors it uses. It also has the ability to customize individual nodes in ways that simply are not possible in most my mapping applications.

iThought's developer is always looking for ways to make the app more productive. For instance, if you create a node and dictate in to it with Siri, separating words with commas, iThoughts will automatically create notes separated by those commas with the names you describe your series. At first this seems crazy, but once you figure it out, you can add notes incredibly fast.

While iThought does not support iCloud, it does support cloud syncing through services like Dropbox. Also, there is a version of iThoughts for the Mac so you can work with your data on both platforms.
Outlining

If mind mapping sounds like a bunch of hippie nonsense to you, you probably would like to make an outline. In a lot of ways, an outline can serve the same function as a mind map. Where mind maps are the thing for to be left brain types, outlines are the perfect answer for those days we need things just more organized.

Outlining with a tool that can work on the iPad, the iPhone, and the Mac brings your outlining game to a whole new level. You may start an outline on your Mac and you may add small bits and pieces to it from your iPhone as they occur to you.

Indeed having constant access to my outlines with your iPhone allows you to not only access the information in them but also make better outlines.

The best application for using outlines on the iPad, iPhone, Mac is OmniOutliner. The Omni Group is one of the premier app developers for the Mac and iPad. The company's roots actually go back to the NEXT computer, which Steve Jobs worked on before he came back to Apple. I use a lot of their applications including their outliner, OmniOutliner on the iPad.

What makes the Omni Group stand out is their attention to detail. The company is bursting with talented programmers, graphic designers, and all the other people necessary to make an application worth using and they spend a lot of time thinking about the context of an application to the platform it is being used on. For example, OmniOutliner on the iPad operates differently than it does on the Mac, taking advantage of the strengths (and weaknesses) of each platform.

OmniOutliner is flexible and able to serve many roles ranging from a simple list of ideas to a detailed outline of a novel. It looks fantastic and has many built-in themes to get you started. They have templates for drafting a book, creating a budget, taking notes in class, and other common uses for an outline on your iPad. Opening one of these templates allows you to get started immediately. You can, however, further customize these templates and save your own.

OmniOutliner also allows you to embed detailed notes and text inside your outline branches. The application supports rich text allowing you to apply multiple styles to your outline. I know people that have written books using OmniOutliner's text support features.
Finally, at its heart, OmniOutliner is a powerful outlining tool. You can move branches, indent (or outdent) sections of your outline, and otherwise build a dynamic outline very easily on your iPad on OmniOutliner.

One feature that OmniOutliner particularly nails is multiple columns. You can add columns formatted as checkboxes, dates, numbers, and plaintext. The numbers columns can even have automatic sums and averages applied to them turning it into a simple spreadsheet.

Rather than support iCloud or Dropbox, the Omni Group has created its entirely own syncing engine, Omnipresence. With an Omnipresence account, you can save your OmniOutliner data on your iPad and Mac to one common location and have it always synchronized between the two. Because the Omni Group controls the entire widget, there's only one person to call (and they do have 800 phone numbers with people that can answer your questions) if something goes wrong.

**Microsoft Word**

Seamlessly working on Microsoft Word documents from your Mac to your iOS device is the next most important workflow for most legal professionals. The idea is that you could create a new Microsoft Word document on your Mac, pick up your iPad on the way out of the office, and continue working on that same document from your iPad. That was a fantasy a few years ago, but it's entirely possible today.

In fact, when the iPad was introduced in 2010, there were no official Microsoft apps available for the iPad to edit Microsoft Word documents. We would have to use a variety of obscure and third-party apps to edit Word documents and they usually broke the formatting of the Word documents ... to the point where most of us just stopped using them to avoid the frustration. Plus there was no easy way to share the documents between the Mac and iOS devices. We
could use Dropbox but it was not a smooth operation because we had to download, the re-upload. It was a mess.

But in March 2014, Microsoft finally released their official Microsoft Office apps for the iPhone and iPad. There are separate apps for Word, Excel, and PowerPoint. Microsoft released the apps for free. You could perform some basic edits in the Microsoft Word app but the full functionality was only available if you had a subscription to Microsoft Office 365.

And if you did have a subscription to Office 365, that meant you also had some space on OneDrive which his Microsoft's storage service similar to Dropbox. You could create a Microsoft Word document on your Mac, save it into your OneDrive folder, then access the document from your iPad or iPhone from the OneDrive location and continue working on it. All of the changes and edits would sync back and forth between your computer and devices.

Microsoft continued to offer more and more functionality into the Office apps, and today, you can even perform this same feat using Dropbox instead of OneDrive. For example, you could create a Microsoft Word Document on your Mac and save it into your Dropbox folder. You could then pick up your iPad and open the Dropbox app, find that same Microsoft Word document and tap to open it in the Dropbox app, and there's now an option at the bottom that allows you to open that Microsoft Word document in the Microsoft Word app. You can then edit the Word document in the same way you edit the document on a computer. When you're done editing on the iPad, tap the left-pointing arrow in the upper left corner of the screen. When you do that, Word will save your document and upload it immediately back to Dropbox so that all of your changes and edits are now saved into Dropbox. When you get back to the office, you can open the same Word document and continue editing.

**Additional Writing Tools**

Microsoft Word should not be the only writing tool in the lawyer's tool belt. There are several apps that are not "word processors" so much as they are writing tools, little bits of software designed to make it easier to get words out of your head and on to the screen. These apps don't feature fancy formatting but instead organizational tools to help you craft better documents. The idea is you write the words with these apps and leave Microsoft Word for the fancy formatting.

**Ulysses**

Ulysses is an excellent tool for writing on the iPhone, iPad, and Mac. The application won an Apple design award a few years ago and for good reason: it's really pretty. It's also really functional. Ulysses works on the principle of what I call text buckets. You come up with
something important to write and you break it down into various pieces. Maybe you're working on a client letter that only has five pieces or maybe you are working on something more complicated, like an appellate brief, and it has 200 distinct parts. Either way, you set up your text buckets in Ulysses and then the app makes it easy to jump between them and write words, edit, and re-organize at will. The whole thing syncs with iCloud so you can pick up any Apple device and pick up where you left off.

The idea behind Ulysses is to skip all that formatting and just write text. You aren't going to be changing fonts in Ulysses or setting page numbers. It is just you, your keyboard, and your text.

When you are done Ulysses can export your text to a variety of formats including eBooks, DOCX, PDFs, and HTML.

Ulysses is all about those buckets. If you are walking down the street and it suddenly occurs to you that I needed to add a particular argument to your brief, open Ulysses on your iPad or iPhone and add a section (bucket). Later I can go back and write the rest of the text.

Another good use for Ulysses on your iPhone is what I call the "text bank". All lawyers have bits of text they use repeatedly. Using Ulysses these bits of text are easy to store, find, and - since they are in plain text - you can paste them anywhere (including Microsoft Word) with minimum fuss.
Scrivener

If you want to do long-form writing and Ulysses isn't scratching the itch for you, look at Scrivener. Scrivener is very much like Ulysses in that it gives you text buckets and a simple to build organizational system for getting your writing done.

One of Scrivener's best features is the way it handles research. Scrivener doesn't just hold your words, it also holds your research. So if you're working on a complicated legal brief and I have PDFs, Word documents, and images I'm using as research, I can store those items right in the Scrivener file. You can then refer back and forth to that research as I fill my text buckets. These research tools are very powerful and, remarkably, the Scrivener developer got it working on the iPhone and iPad in addition to the Mac.

Both Scrivener and Ulysses are excellent options for long-form writing on your iPhone. You can't go wrong with either. I prefer Ulysses for most tasks because of its simplicity but when I'm working on something research intensive, like complicated legal briefs, I'll use Scrivener.

Apple Notes

The Apple notes app has come so far in the last several years that it is now absolutely useful place to save words to your Mac, iPad, and iPhone. In a pinch you can write anything in Apple Notes and copy and paste it into your word processor later.

Grammarly

Grammar checkers have been a thing in word processors for ages. Grammarly is powerful and smart for 2018. It's web-based and it can work with any words I write in any application. They've got an app on the Mac and recently, they've added a dedicated iOS keyboard for
iPhone and iPad that lets you use the Grammarly engine to check your grammar in any app on your iPhone. You just activate the Grammarly keyboard, press the Grammarly button, and go.

**Dictation**

For a lot of people talking to your electronic devices feels like something that belongs in the future. It doesn't seem to make any sense that you could talk and your computer could understand and act on those words. That may be you. Or perhaps you tried voice to text dictation sometime in the not so distant past and it failed miserably so you decided it was something that just won't work. Fortunately, that's not true anymore. Our mobile devices are now quite good at listening to us and turning our words into text.

On the iPhone there's a couple ways you can do this. Using the Siri digital assistant, you can make your iPhone jump through all sorts of hoops. Just as important, using Siri dictation, you can add text to anywhere on your iPhone, iPad, or Mac without having to bother with the keyboard. Finally, there is a third-party application that does an even a better job at turning your words into text, Dragon Anywhere.

**Using Siri Dictation**

The Mac, iPad, and iPhone have the ability to transcribe your words into text. This feature is called Siri dictation. This feature will work in any application where you can use the standard Apple keyboard. On the Apple keyboard, just left of the spacebar is a microphone button. When you tap that, it activates Siri dictation. (On the Mac, you trigger a keyboard combination which is by default two taps of the function key.) You can then start speaking and put your words into text wherever the cursor is located.

If you're not used to dictation, there's a few tricks that can make it a lot easier for you. In a lot of ways, computers are not very smart when it comes to understanding what we say. To a computer "your analysis" sounds exactly the same as "urinalysis". Humans can put words into context and computers try to do the same thing, often with hilarious results. As a result, speaking in complete sentences to Siri gives your iPhone more data to work with and makes it much more likely to get things right. So when you are dictating, you are much better off taking a moment to
compose the entire sentence in your head and then dictating it all at once than pausing two or three times during the dictation to figure things out.

There is also a problem with Siri Dictation on the iPad and iPhone in that it only works for so long. (This is not true on the Mac.) Somewhere between two and four sentences of dictated text, Siri Dictation will turn off. Specifically, Siri dictation shuts down after 40 seconds. Then you need to tap the Siri dictation button again and pick up where it left off, sometimes in mid-sentence. Not only is this odd for you and Siri, it is also grammatically confusing. When you resume dictation, you may get some grammatical hijinks as a result, like a capitalized word in the middle of a sentence.

Another hurdle with Siri dictation is its inability to learn additional words. Siri can pick up nicknames from your contacts but if you are using names that aren't in your contact database or jargon that's not in a standard dictionary, you're going to give Siri fits. Quite often when I am dictating with Siri, I'll put placeholder words in like "Banana" or "Monkey" for any words I know Siri will mess up. Then I later go back and search and replace those placeholder words with the actual name or word I intended. If you follow up on this trick, just make sure you remember to search and replace. It's no fun receiving a letter or email addressed to "Dear Mr. Monkey."

All of these foibles aside, Siri Dictation can be a significant productivity tool if you spend a little time mastering dictation. If the above shortcomings really bother you, I have a solution. It's called Dragon Anywhere.

**Dragon Anywhere**

Nuance is one of the world’s leading voice-to-speech software companies. Their Dragon Dictate application is the best solution on the Mac and PC for converting your speech to text. They also have an app for the iPhone power-dictators called Dragon Anywhere.

Dragon Anywhere cures most of Siri dictation's sins. The application has an open mic. Once you press the green button you can talk for as long as you want. Well... sort of. If you stay silent for 20 seconds, the microphone will turn itself off. But if you want to leave Dragon anywhere running while you slowly compose your letter or document, the application will keep up. No longer do you have to worry about stopping midsentence like Siri dictation does every time you get on a roll.

Dragon anywhere also has a user definable dictionary. If you have a strange proper name or jargon term that you want to dictate, add it to Dragon's dictionary and you're good to go. As an example, as I've been writing this book with dictation, I've added all the App names I'm
referencing so I can just dictate them in. A nice side benefit is that Nuance stores your custom dictionary online. If you’re also using DragonDictate on the Mac or Dragon Anywhere on your iPad, the custom dictionary is a shared across all platforms. Using Dragon anywhere, no longer do you have to use little tricks like dictating the word "monkey" in place of somebody's name and replacing it later.

Dragon Anywhere also allows you to dictate corrections. If you see a mistake you can select it with your voice and correct it all without opening the keyboard.

One downside is the fact that you cannot use Dragon Anywhere in other applications on your iPhone. Instead, you dictate into the Dragon Anywhere application. From there, you can export the text in a variety of formats or just copy it and then go paste it in whatever application you wish. This is not as seamless as Siri dictation which is embedded in the operating system and the standard keyboard.

Another downside is cost. Dragon Anywhere requires a subscription which, as this book goes to press, is $15/month. Siri dictation is free. If that's getting it done for you, you're probably just fine. If, however you need the custom dictionary and the ability to dictate at length without worrying about when it will automatically stop, Dragon Anywhere is well worth it.