

# Turning the iPad into a Business Tool

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**By**

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One of the most frequent questions I have received in my CPE presentations and consulting engagements over the past year is; “Why do I need an iPad for my business?” It’s an excellent question because it is an important strategic decision to start deploying these in any size organization and while they are relatively inexpensive on an individual purchase basis, the investment can rise significantly when you purchase them in bulk. Now that I have had the opportunity to use an iPad for the past year for both personal and business, I have come to the conclusion that even at the current price levels for these devices, an investment can be justified for every “information worker” in business. And CPAs are some of the most intensive information workers in business today. My basis for this conclusion is that it is all about personal productivity. Employees in general are an expensive investment and professionals to an even greater extent. Therefore, if we can provide them with tools that allow them to get things done more efficiently at a reasonable investment, then we should.

## **Can I replace my PC with an iPad?**

This is probably the second most frequent question I get asked about the iPad. I think it is important to understand the role of the tablet vis-à-vis the PC or laptop. iPads are not designed to replace laptops, rather their role is to complement them. The iPad is essentially a utility tool that extends the reach of your information system. Think of it as a “*consumption device*” for consuming information such as viewing documents, conducting research via the web, participating in online meetings and video conferences and processing e-mail. Your PC or laptop is the “*production device*” that is designed for data entry and information processing such as entering transaction data, creating spreadsheets, composing documents, etc. There are definitely overlaps between the two devices and many people who currently utilize a laptop only as a consumption device can forgo the laptop in exchange for an iPad. But for most business professionals it is more appropriate to have both tools at your disposal.

## **140,000 Apps and counting**

The “apps” or applications are what bring life to the iPad and expand the scope of its functionality. The iPad comes with a core set of apps that for many business users can be

enough to justify the investment. A quick rundown of some of the more practical “built-in” apps include:

**Mail** – Allows you connect to multiple email accounts, including synchronizing with MS Exchange.

**Calendar** –Synchronizes with MS Exchange to keep your calendar up to date while you are on the go.

**Contacts** – Maintains a database of contact information that can also synchronize with MS Exchange

**Notes** – A traditional Yellow note pad for composing meeting notes and attaching them directly to an e-mail message.

**iBooks** – the library for storing and reading your eBooks and **PDF files**.

**Face Time (iPad 2 only)** – This app lets you have a face to face video conference with colleagues, clients and others.

**Reminders** – A simple app that keeps track of your to do list. These will synch with your to do list in MS Exchange.

In addition to these practical apps there are an abundance of third party developed apps that can help you leverage the iPad as a valuable business productivity tool. I have provided a sample of some of the more practical apps below. Keep in mind that the supply of apps is growing exponentially and not all apps are created equal. So do the appropriate due diligence before you purchase. It’s not about protecting your \$5 investment in the app, it’s about protecting you from losing valuable information with an app that constantly crashes. Ideally, talk with others who have been using the app, or at least do a Google search for reviews on the app.

**Apple Apps** – Apple offers a set of apps that can be used to replace your MS Office apps

- **Keynote (\$9.99)** is a presentation app that can import PowerPoint files
- **Pages (\$9.99)** is the word processing app that can import Word document files
- **Numbers (\$9.99)** is the spreadsheet app that can import Excel workbook files

**Quickoffice Pro (\$19.99)** – This app lets you create, edit and share MS Office documents and PDF files between your iPad and PC. The built in file manager lets you exchange files via the cloud or through iTunes.

**Evernote (Free / \$5 per month premium version)** – This is a versatile note-taking app that works across multiple platforms; iPad, Android and PCs. If you have a camera it will upload your snapshot image to the server and process an OCR (optical character recognition) conversion that makes the image text searchable. Once you compose and save a note it will be available on any device that you have installed Evernote on.

**Box.Net (Free / \$15 per month)** – This is one of many alternative cloud based storage services that provides password protected and encrypted (premium version) file sharing. This is an efficient way to transfer PDF documents and other files to and from your iPad.

**GoodReader (\$4.99)** – This is a top selling app that lets you view PDF files on your iPad and annotate them with pop-up notes, highlights, underlines and many other drawing tools. The annotations are all compatible with Adobe Acrobat so when you get back to your office you will be able to view your GoodReader annotations in Acrobat.

These are just some of the more popular apps that can help you transform your iPad into a productive business tool. Stay tuned, many more are coming.

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