



MASTER YOUR TECH

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THIS WILL ALWAYS MATTER

- Technology is more and more a part of our lives
- Out of office work was always becoming the norm
 - Lifestyle – Travel; Working Parents
 - Client Demands
- Now it's just a practicality
 - Working from home
 - Even in person, you may need to be able to literally pick up and move six feet apart
- May need to be prepared to move in and out of your office in waves, with little notice
- What this presentation is (practical efficiencies) and what it isn't (hanging a blanket behind you for zoom calls and setting boundaries for your work hours)

TRIAL BY FIRE

- You all know the basics now of working out of the office.
- Now it's time to take a step back, catch your breath, and do this effectively
 - What held you back before?
 - What stops you from using it now?
 - What do you miss from your office?
 - What has bothered you more than 3 times?
- There are more than 30 suggestions, tips and apps in this presentation. Pick 3-5.

ADAPTABILITY

- NOT about working from home – it's about working WELL, from anywhere
- Tech is about flexibility, quality and consistency
 - Mindmapping v. To Do Lists
- Plan to spend \$100-200 above the actual piece of technology to make it useful
 - Protective cases - what are your needs, besides pretty?
 - Stylus holder? Toddler proofing? Keyboard (yes!)? Room for a paper notepad?
 - Stylus
 - 10' cords, dual charger, spare battery chargers.
 - Apps and services – more on this later.
- Bring a pen and paper too – as backup and to take lunch orders.
 - (Remember, you can lose papers too, so this is not a reason to avoid technology!)

WHAT DOES YOUR BRAIN LOOK LIKE?



SET UP YOUR TECHNOLOGY

- \$200, and 2 hours. Both well invested.
- When trying to think about what to buy and download, think about what you have in your physical office that you need, that you don't have at remote locations. Scanner? Copier? Dictation equipment? Pen and paper? Calculator? Microsoft office? Then you set about filling those gaps.
 - Be open minded, but avoid shiny object syndrome
- Using a tablet?
 - Set up your apps thoughtfully – most used on front; work on one screen, travel on another, games on another; by color; by the hand that doesn't have carpal tunnel
- Can you double screen using another device? (Newer apple products call this “sidecar.”)
 - Increase in productivity
- Services – password protectors, to-do lists, etc.
 - Make sure your program backs up, and is portable to another service

SAFETY FIRST

- Maintaining Confidentiality
 - VPN – The Digital Solution
 - Screen Shade – The Analog Solution
 - magnetic v. permanent
- Password Manager
 - These were all on CNET Best of 2020: LastPass, 1Password, Dashlane, Keeper, Bitwarden
 - Free and Subscription Versions. Subscription versions often have extras –VPNs, dark web monitoring, credit and ID theft monitoring...
- Scrubbing Metadata
 - Microsoft Word: File > Check for Issues > Inspect Documents > Check All Boxes > Inspect > Remove All (scroll down to hit all of them) > Reinspect
- Dual Factor Authentication
- Trust, but verify (like inspecting your dishes coming out of the dishwasher)

INBOX MANAGEMENT

Productivity Tip: If an email is a:

- Task → add to list or calendar
- For Information or Reference → file it

- Not limited to zombie apocalypse, but more important when remote
- Search “unsubscribe”
 - Look! All your newsletters! Sort by sender and get thee to deleting! And unsubscribing!
- Practical Folders - #Events, #Orders
- Set up rules – “Probably Delete Me,”
 - Combine this with your practical folders
- Shortcuts/Quick Steps
 - Move to folders
 - Send group emails
- Email Bankruptcy
 - Pick a time – if it’s older than a year, are you going to read it?
 - Move to a separate folder, deal with in 30 minute increments

INBOX MANAGEMENT – MICROSOFT OUTLOOK

■ Set Up Folders

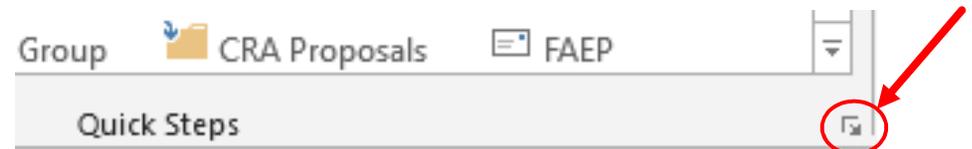
- Folder Tab > New Folder
- For temporary emails, put a symbol or number at the beginning to keep them at the top of the list
- #orders, # receipts, #events, #probably delete me
 - In here, sort by sender

■ Set Up Rules

- Home Tab > Rules > Create Rule > Advance Options > Follow Prompts
- Right Click on Email > Create Rule
- My favorite: Always move emails from iduntwantthis@spam.com to “Probably Delete Me” folder.

■ Quick Steps

- Home Tab > Quick Steps “Manage” Button (see below) > New > Custom
- My two favorite kinds:
 - Move to Folder
 - Email Working Group



DOCUMENT INTERFACING

- Many apps will convert your documents to PDFs
- Features to Consider:
 - Handwriting and Typing
 - Storage and Searching
 - Converting Files – word documents, webpages
 - Converting Handwriting
- Apps: Microsoft Word, **Noteshelf 2**, Evernote, Microsoft Onenote...

APPLE TIP: If your document can't convert to PDF, try converting it to an iBook, that can then be emailed and opened in your app of choice. This works well for websites.

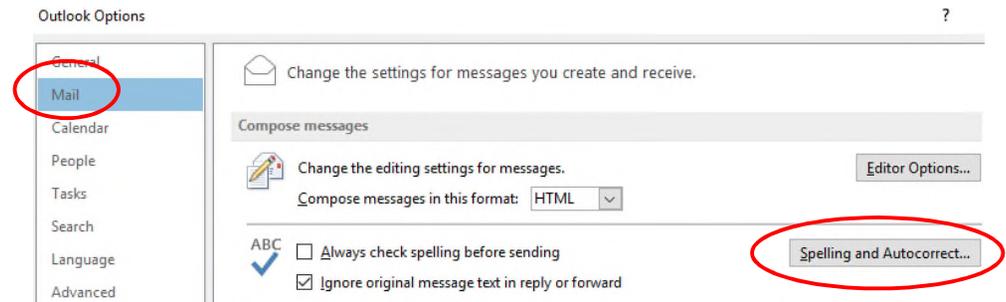
MICROSOFT WORD

- Customize Your Ribbon
 - **Delete Sections of the Header You Don't Use:** left click on the Ribbon > Customize Ribbon > Select "Home" under main tabs > right click on the sections you don't use > remove.
 - **Put the Things You Use Most on Your Home Tab:** left click on the Ribbon > Customize Ribbon > Select "Home" under main tabs > New Tab. Then, using the menu of the left, select the things you use most often.
 - I use: insert table, all the "redlining" functions, insert table, insert page break, and others.
- Quick keys – I type "§" and "¶" a lot, so I set up shortcuts
 - Insert tab > Symbols > More Symbols > Select the symbol you want > shortcut keys > pick your shortcut (i.e. ctrl + 6)
- Turn off unwanted autocorrect: I type (c) and (e) a lot, and don't want those converted to © and €
 - Insert tab > Symbols > More Symbols > Autocorrect > Select the symbol you want to stop appearing > delete
- Accept all formatting.
 - Review Tab > Show markup > uncheck everything but formatting > close dropdown menu, hit the down arrow next to Accept > Accept all changes shown. To once again see all other changes, go back to show markup and reselect everything.

TEXT EXPANDERS

- Phrases you use a lot
- Make sure shortcut is not a word
- Apple Products:
 - Settings > General > Keyboard > Text Replacement > + (top right) > Type the long form into the “phrase” box and your shortcut into the “shortcut” box.
- Microsoft Outlook:
 - File > Options > Mail > Spelling and Autocorrect > Autocorrect Options > put the shortcut into the “replace” box and the long form in the “with” box > OK
- Microsoft Word:
 - File > Options > Proofing > Autocorrect Options > put the shortcut into the “replace” box and the long form in the “with” box > OK
- NOTE: depending on your system, your text expanders may migrate across programs (within Microsoft) or devices (iPad and iPhone).

“tvmaaa” → Thanks very much, and as always, please reach out if I can assist you with anything further!



TEAM COORDINATION

- Shared Project To-Do Lists
 - Kathryn's Pick: Todoist
 - Others: Remember the Milk, Asana, Omnifocus
- Video Chatting
 - Zoom/WebEx/GotoMeeting/Microsoft Teams
- Document Collaboration
 - Dropbox, Sharefile, Google Docs
- Apple Airdrop in Meetings
 - Working with a partner
 - Staying socially distant

LEGAL

- All of your contracts need to allow for electronic signatures, and PDFs
 - **Counterparts and Transmission.** *To facilitate execution, this Agreement may be executed in as many counterparts as may be convenient or required, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. The executed signature page(s) from each original may be joined together and attached to one such original and it shall constitute one and the same instrument. In addition, said counterparts may be transmitted electronically (i.e., via facsimile or .pdf format document sent via electronic mail), which transmitted document shall be deemed an original document for all purposes hereunder.*
- R-post
 - E-Delivery proof.

This slide is not, and is not intended to be, legal advice, and does not establish an attorney-client relationship.

IT PROFESSIONAL

Hi Jeff!

**Be nice to your
IT PROFESSIONAL!**

KATHRYN'S TOP 10 APPS FOR WORK

1. Noteshelf 2 – Handwriting, PDF conversion, PDF revisions, document storage, searching (\$9.99)
2. Todoist – To Do List Keeper (syncs across tablet, phone, and website) (Free, \$30/year for pro– highly recommend pro)
3. Dashlane – VPN, Password Manager, Dark Web Monitor (\$60/year, now have a family plan)
4. Microsoft 365 (Pricing depends)
5. ITTT – If This, Then That – helps your apps talk to each other (synching calendars and to-do lists, for example) (Free)
6. Tiny Scanner Plus (\$4.99)
7. VLC Media Player – Video/sound playing service for Apple (Free)
8. Calculator – Not standard on iPads, many free versions
9. WebEx/Zoom/GotoMeeting – pick your poison.
10. Awesome Note* - *any note-typing app will do.

HONORABLE
MENTION: Apple
“Shortcuts” App

CLOSING THOUGHTS

- Clean out your files every few months. Just like you would your desk.
- Don't use your technology as a substitute for human contact, when we can do that again. Even zoom is no substitute for in-person coordination.
- If something bothers you more than 3 times, search for a solution. You may be surprised what other people have already figured out!
- I will email a copy of this presentation to everyone who registered for this panel, and if you didn't register, just shoot me an email.

THANK YOU!

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