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# MASTER YOUR TECH

# EXAMPLE TECHNOLOGY USE TRAJECTORY

3. Busy Person in the MIDDLE OF A PLAGUE FORCED TO GO TOTALLY MOBILE, possibly while also keeping offspring and other dependents at bay; dreams of having an in-home office copier and says “zoom” like it’s a dirty word

2. Busy person; confidently uses mobile technology for 3-4 specific things

1. Lists “Microsoft Office” as skill on resume

4. Busy person emerges from pandemic...but doesn't want to wear pants every day

## Maintain Confidentiality

- Screen Shade – The Analog Solution
- VPN – The Digital Solution
- Use your mobile device as a hot spot instead of connecting to public wifi

**iPhone/iPad:** Settings > Personal Hotspot > toggle “Allow others to join.” On the device without internet, look for your iPhone/iPad in wifi or Bluetooth. Can also be hardwired if you have cords to connect the devices.

## Use Passphrases and a Password Manager

- These were all on CNET Best of 2021: LastPass, 1Password, Bitwarden. Also mentioned: Dashlane, Keeper, KeePassXC
- Free and Subscription Versions. Subscription versions often have extras –VPNs, dark web monitoring, credit and ID theft monitoring...

SAFETY FIRST

# SAFETY FIRST

## Scrub Metadata

### **Microsoft Word:**

File > Info\*> Check for Issues > Inspect Documents > Check All Boxes > Inspect > Remove All (scroll down to hit all of them) > Reinspect

\*earlier versions skip this step

## **Use Dual Factor Authentication**

- Anything sensitive (medical), related to finances, or that will allow entry to your home or vehicle
- If not available, do not allow automatic login for these

# LAWYERS, DATA SAFETY IS YOUR JOB

## CHAPTER 4. RULES OF PROFESSIONAL CONDUCT PREAMBLE: A LAWYER'S RESPONSIBILITIES

- In all professional functions a **lawyer** should be **competent**, prompt, and diligent. A lawyer should **maintain communication** with a client concerning the representation. A lawyer should **keep in confidence** information relating to representation of a client except so far as disclosure is required or permitted by the Rules of Professional Conduct or by law.

## **ROUGH TRANSLATION:** RULES OF PROFESSIONAL CONDUCT PREAMBLE: A LAWYER'S RESPONSIBILITIES

Lawyers should be good at what they do

and since most modern communication is electronic

thou shalt should keep client information safe from wifi trolls in Starbucks.

## RULE 4-1.6 CONFIDENTIALITY OF INFORMATION

- **(a) Consent Required to Reveal Information.** A lawyer must not reveal information relating to representation of a client except as stated in subdivisions (b), (c), and (d), unless the client gives informed consent.
- **(e) Inadvertent Disclosure of Information.** A lawyer must make reasonable efforts to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to, information relating to the representation of a client.

# I'M SERIOUS HERE, IT'S YOUR JOB

- **Rule 4-1.1 COMPETENCE**

A lawyer must provide competent representation to a client. Competent representation requires the legal knowledge, skill, thoroughness, and preparation reasonably necessary for the representation.

- WAIT FOR IT...Rule Comments!

## **Legal Knowledge and Skill**

Competent representation also involves safeguarding confidential information relating to the representation, including, but not limited to, electronic transmissions and communications.

## **Maintaining competence**

To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, engage in continuing study and education, including an understanding of the benefits and risks associated with the use of technology, and comply with all continuing legal education requirements to which the lawyer is subject.

# YES, YOU HAVE TO TELL THEM THEY HIT REPLY ALL

- RULE 4-4.4 RESPECT FOR RIGHTS OF THIRD PERSONS

(a) In representing a client, a lawyer may not use means that have no substantial purpose other than to embarrass, delay, or burden a third person or knowingly use methods of obtaining evidence that violate the legal rights of such a person.

(b) A lawyer who receives a document or electronically stored information relating to the representation of the lawyer's client and knows or reasonably should know that the document or electronically stored information was inadvertently sent must promptly notify the sender.

*Read the comments. They contain gems like:*

For purposes of this rule, “document or electronically stored information” includes, in addition to paper documents, e-mail and other forms of electronically stored information, including embedded data (commonly referred to as “metadata”), that is subject to being read or put into readable form. Metadata in electronic documents creates an obligation under this rule only if the receiving lawyer knows or reasonably should know that the metadata was inadvertently sent to the receiving lawyer.



# LEGAL DOCUMENTS

- All of your contracts need to allow for electronic signatures, and PDFs
  - Digital Signatures
  - **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.

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# EFFICIENCY

- 
- Many of us work using a billable hour model, which means every minute (or 6) counts.
  - Using your technology to make you more efficient means you can:
    - Handle more work
    - Save your clients money
  - You can improve communication with your team and your clients
  - You can get the same product (or better), with less time

# 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.

Examples: insert table, all the “redlining” functions, insert page break...

## Set Up Quick Keys (Shortcuts)

### **Examples: I set them up for “§” and “¶”**

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 In Track Changes

**Accept only formatting - not text - changes**

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.

MICROSOFT WORD

# TEXT EXPANDERS

- Phrases you use often
- Make sure the shortcut is not a word
- 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!

## Apple Products

### **iPhone/iPad:**

Settings > General > Keyboard > Text Replacement > + (top right) > Type the long form into the “phrase” box and your shortcut into the “shortcut” box.

### **iMac/MacBook:**

System Preferences > Keyboard > Text > + (bottom left) > type shortcut in the left box and long form in the right

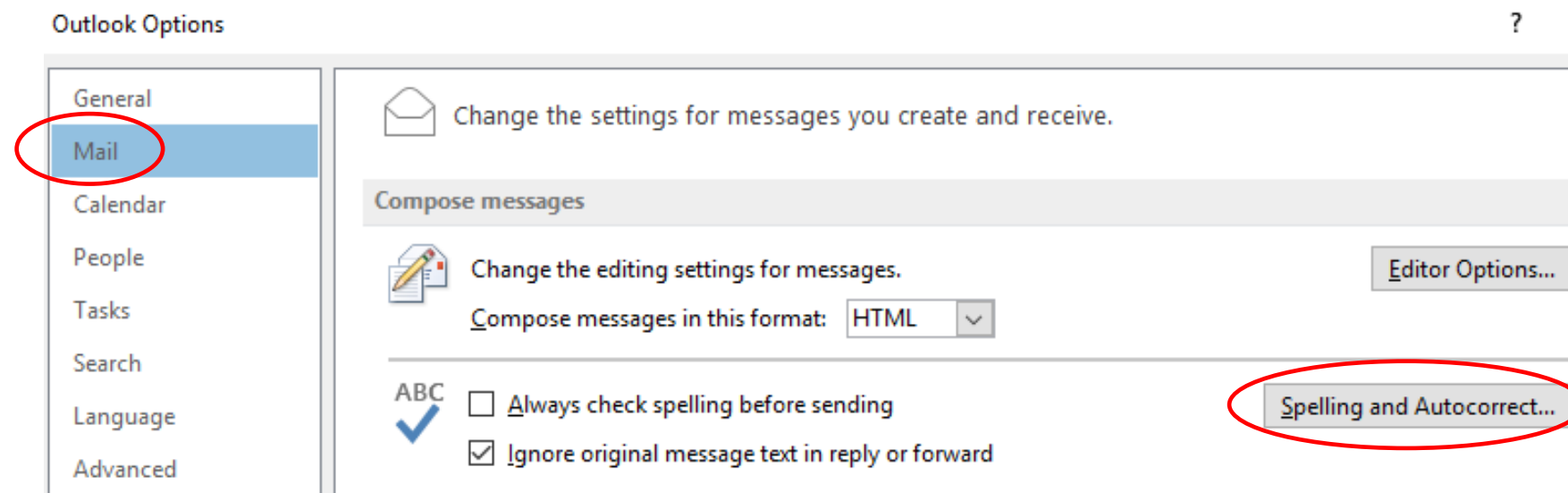
# TEXT EXPANDERS - MICROSOFT

## 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



# INBOX MANAGEMENT

Productivity Tip: If an email is a:

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

1. **Search “Unsubscribe”**
  - Look! All your newsletters! Sort by sender and get thee to deleting! And unsubscribing!
2. **Create Practical Folders**
  - #Events, #Orders
3. **Set Up Rules**
  - “Probably Delete Me”
  - Combine this with your practical folders
4. **Use Shortcuts/Quick Steps**
  - Move to folders
  - Send group emails
5. **Declare 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

## Set Up Folders

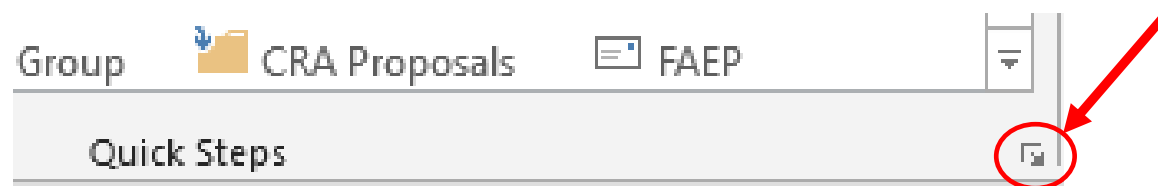
- Folder Tab > New Folder
- For temporary emails, put a symbol or number at the beginning to keep them at the top of the list
- #orders, # receipts, #events, #probably delete me
  - In here, sort by sender

## Set Up Rules

- Home Tab > Rules > Create Rule > Advance Options > Follow Prompts
- Right Click on Email > Create Rule
- My favorite: Always move emails from [idotwantnewsletters@spam.com](mailto:idotwantnewsletters@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





# SURF SMARTER

- **Limit Searches to One Domain**
  - Safari, Chrome and Firefox allow you to limit searches to one domain (host website)
  - For example, if you only want to search the CDC website for COVID-19 information, you type “cdc.gov COVID” and it will only search cdc.gov
- **Create Tab Groups**
  - In Chrome, Create Tab Groups: right click on your tabs to put them into a group, so you can organize your tab sets by project
- **Use Private Pages**
  - Private Web Surfing on iPhone/iPad Safari
  - Click the two overlapping squares at the bottom right>hit private

# FLEXIBILITY, ADAPTABILITY, QUALITY



- **Flexibility**
  - It's not about working from home – it's about working well, from anywhere
- **Adaptability**
  - Apps and shortcuts allow you to customize your tools
- **Quality and Consistency**
  - Avoid data loss and silly mistakes
- **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!)

# SET UP YOUR DEVICES – PHYSICAL NEEDS

- **Invest \$200, and 2-4 hours**
  - Protective cases - what are your needs, besides appearance?
    - Stylus holder? Toddler proofing? Keyboard (yes!)?  
Room for a paper notepad?
  - Stylus/mouse
  - 10' cords, dual charger, spare battery chargers
  - Apps and services – What's your work style?
    - More on this later.
- **What Do You Need to Connect?**
  - Converters – USB, Ethernet, firewires...
  - Can you double screen using another device?  
(Apple products call this “sidecar.”)

- **Set up your apps thoughtfully**
  - What works for YOU?
    - 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?
- **Be smart about folders**
  - Leave apps you use every day out of any folders
  - Apps you might use together or are related, put in a folder (or on a separate screen)
  - Put apps you don't use often, but want to keep, in a folder

# SET UP YOUR DEVICES – DIGITAL ORGANIZATION

# HOW TO AVOID SHINY OBJECT SYNDROME

## ■ Be Intentional!

- If you worked from home, what did you like?
- What did you miss from your office?
  - Scanner? Copier? Dictation equipment? Pen and paper? Calculator? Microsoft office?
- What has bothered you more than 3 times?

## ■ You can experiment

- Services – password protectors, to-do lists, etc.
  - Make sure your program backs up, and is portable to another service

- **Look for things that work for YOU**, not for your more organized friend!

## WHAT DOES YOUR BRAIN LOOK LIKE?



# HANDLING DOCUMENTS ON TABLETS AND PHONES

- Microsoft Office 365
- Many apps will convert your documents to PDFs for markup
- 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/website won't convert directly to a PDF, try converting it to an iBook, that can then be emailed and opened in your app of choice.

- **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

## TEAM COORDINATION

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

## KATHRYN'S TOP 10 APPS FOR WORK

**HONORABLE MENTION: Apple  
"Shortcuts" App**  
\*Bonus points: You can use a shortcut  
to have your car order you coffee if  
you have Apple CarPlay



# DECLUTTERING IS DELIGHTFUL

- **Set up a junk email**
  - For coupons, receipts, etc.
  - Turn off all badges, sounds, and banners!
  - Apple: Settings>Notifications>Mail>Select that Account>Uncheck all alerts, turn sounds to “none,” and toggle “badges” to off
- **Automatically clean out your podcasts**
  - Are you really going to listen to that “breaking news” podcast from six months ago?
  - Apple: Podcasts>Library>Shows>”...” button in top right > Settings > Limit Downloads
  - NOTE: Latest apple update wrecked podcast app!
- **Clean out your digital files**
  - Every few months, just like your desk

IT PROFESSIONAL

Hi Jeff!

Be nice to your  
IT PROFESSIONAL!

## ■ **TURN OFF EMAIL NOTIFICATIONS**

- I PROMISE YOU – YOU DEFINITELY HAVE A NEW EMAIL

## ■ **Apple Seeds:**

- “Find My iPhone” works for your AirPods, both the case and individually
- Shaking your iPhone = undo
- Tap the top left corner to go the previous app

## ■ **Music Fan?**

- For an interesting perspective on technology and music, watch Episode 2 of “This is Pop” on Netflix.

## ■ **Want to get organized while you drive?**

- I recommend The Productivity Show - my favorite podcast about efficiency and organization.

A FEW  
UNRELATED  
THOUGHTS

## ■ Humans > Technology

- Don't use your technology as a substitute for human contact, when it is safe to do so. Even virtual meetings are no substitute for in-person coordination.

## ■ Use the 3X Rule

- If something bothers you more than 3 times, search for a solution. You may be surprised what other people have already figured out!

## ■ Don't Try to Remember This

- I will happily provide a copy of this presentation – just ask!

LET'S WRAP  
THIS UP

THANK YOU!

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