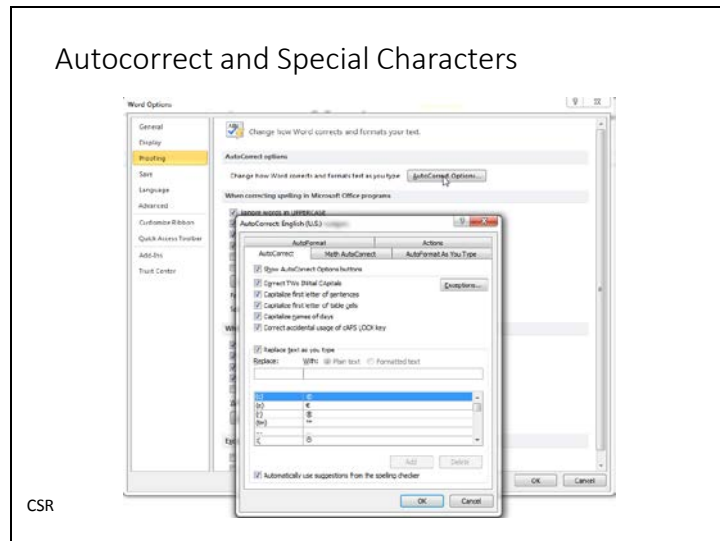


Slide 1

Tech Tips Webinar
sponsored by @GLSAOrg

Catherine Sanders Reach
Director, Law Practice Management & Technology
The Chicago Bar Association



Autocorrect in MS Word can help you add text automatically as you type. For instance, you can add an acronym, like FMLA and when you type it in autocorrect will insert “Family Medical Leave Act”.

To add text entries that are inserted automatically when you type a specific set of characters, you need to use the AutoCorrect dialog box.

Click **the File tab**.

Click **Options**.

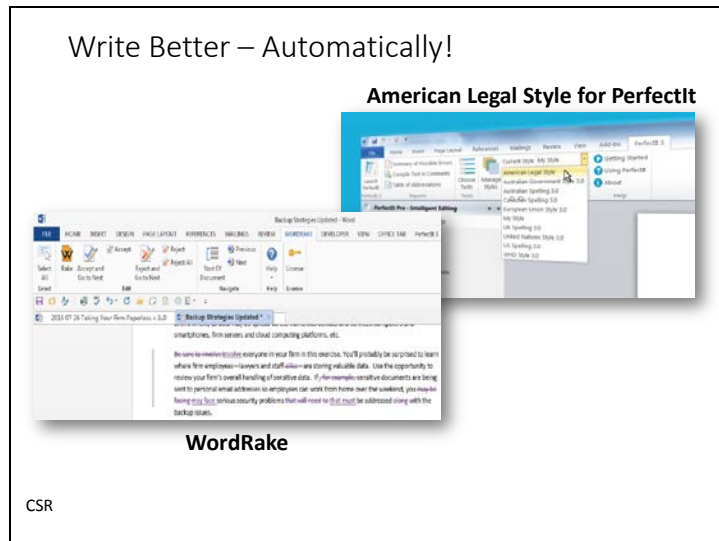
Click **Proofing**.

Click **AutoCorrect Options**, and then click the **AutoCorrect** tab.

Select the **Replace text as you type** check box, if it is not already selected.

Under **Replace**, type the characters that you want to use for your automatic text.

Options for formatting and special characters in Autocorrect are limited. To get around that limitation merely highlight the phrase you want to use and then follow the instructions above. You can choose to use formatted text if you have a firm Style sheet or template. For instance by highlighting “Social Security Act ("Act"), 42 U.S.C. §§ 401 *et seq*” in a document you can add an autocorrect shortcut that will insert that in a document when you type in SSA. The autocorrect library is shared across Microsoft Office, so this will work in PowerPoint, Outlook, Excel and OneNote as well.



American Legal Style for PerfectIt <http://www.intelligentediting.com/resources/american-legal-style-for-perfectit/> helps edit and proofread documents. Looks for consistency (spelling, acronyms), fixes what autocorrect might have corrected, builds in the Bluebook, Garner's Manual on Legal Style, Black's Law Dictionary, etc. Add on for Word on PCs, free trial, \$99 with discount for more licenses.

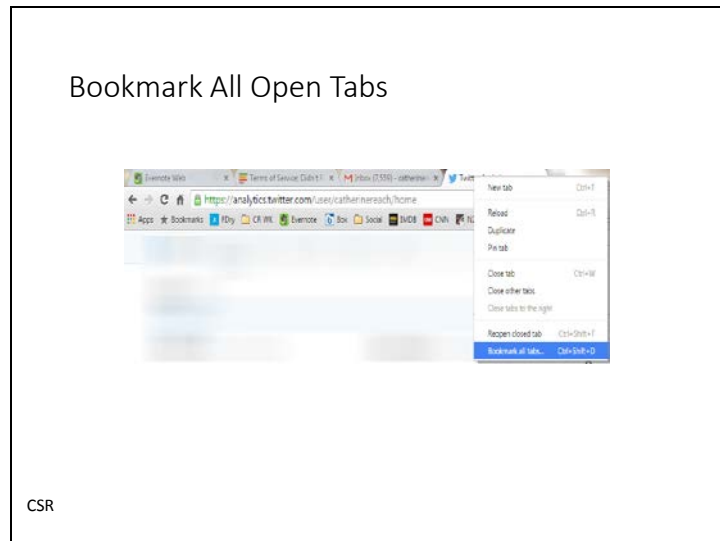
WordRake <http://www.wordrake.com/> takes Gary Kinder's writing suggestions and automates them. Takes out the fluff words in a redline type function to make writing clearer. For example:

- "~~In any event, a~~ SAM'S CLUB "lowest level" manager cannot possibly stand in the shoes of, ~~for example,~~ the Store Manager of a hundred-million-dollar Wal-Mart Supercenter."
- "The defects ~~in this motion~~ are purely legal ~~in nature,~~ but ~~in some cases~~ sometimes ~~an~~ understanding of the legal issues becomes clearer when supplemented by judicially noticeable facts."

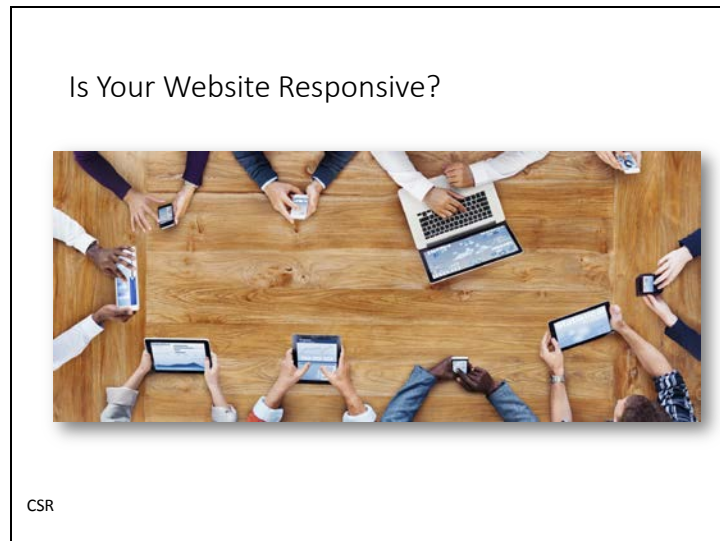
Especially useful for contracts.

Word - \$129 annually, Outlook \$129 annually, bundle \$199 annually.

Slide 4



Imagine you have been doing a lot of research and you need to leave your computer after opening a lot of tabs. You can create a bookmark of all the open tabs in Chrome by right clicking on any tab and choosing “bookmark all tabs”. This will create a new folder in your bookmarks and put links to each website in the bookmark folder. To open all the tabs again go into the bookmarked folder, right click and choose “open all bookmarks”.



Is your website responsive? If you want Google to keep you need the top of the results page it needs to be. <http://www.inboundmarketingagents.com/inbound-marketing-agents-blog/bid/361535/Google-to-Start-Penalizing-Non-Mobile-Sites>

What is responsive you ask? That means your website can be read and used on any device on any browser and that is optimized for the experience.

One way to check if your site is mobile-friendly is to use Google's free tool.

<https://www.google.com/webmasters/tools/mobile-friendly/>

Not mobile friendle? Talk to your website developer about updating your site. If that isn't possible you can move your site to a modern platform, like Weebly, Wordpress, Squarespace or Wex and choose a free, responsive design and migrate your content. Or, for a quick fix use Duda Mobile's tool to create a mobile version of your site that redirects when someone visits from a phone. If your site has fewer than 10 pages and 500 monthly views it is free. This is a weekend DIY project while you get ready for a larger migration.

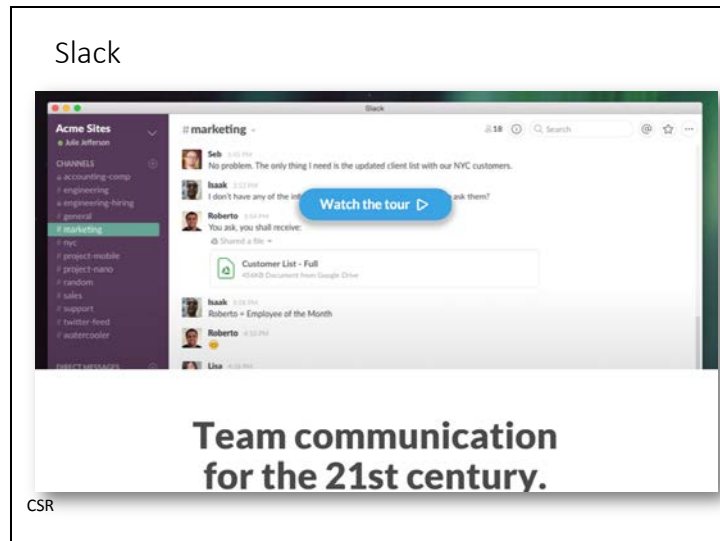
Duda <https://www.dudamobile.com/mobile-website>

Slide 6



Virtru <https://www.virtru.com/> is an email encryption service triggered by switching protection "ON" within a particular email. For the business edition you can revoke sent messages, restrict forwarding, and set emails and files to auto-delete. It works with Outlook 2010 and 2013, with webmail services such as Gmail and Yahoo, with Mac Mail, and on iOS and Android devices. It also auto identifies sensitive information, like social security numbers, and automatically encrypts the message or warns you (depending on how you've set it up). The cost is \$5 per month per user.

Slide 7

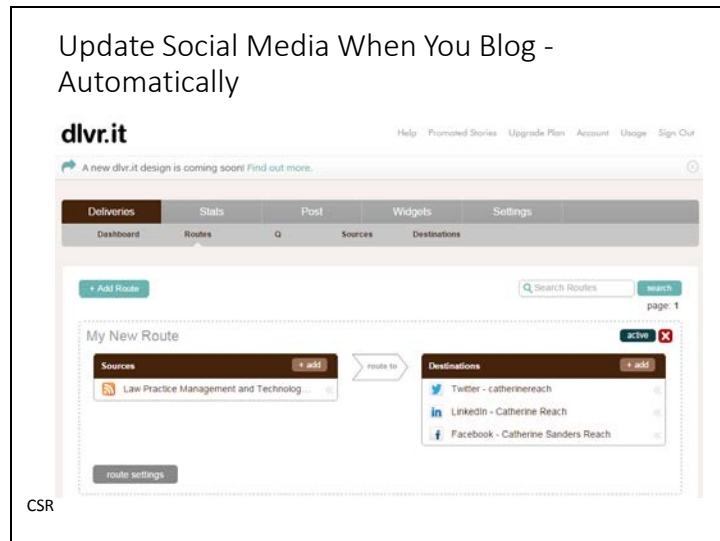


Slack <https://slack.com/> is a freemium (\$6/\$12 per user for Standard and Plus) messaging app that organizes your team conversations in open channels about projects in a transparent view so everyone will know what's going on. Sign up allows up to 5 GB of free storage. You are also able to add unlimited people to your team, search and browse up to 10k messages, and link up to 10 service integrations like Twitter, Google Docs, Dropox, and GitHub to your account.

Why? Because Slack lets you communicate with a team about an upcoming matter and groups all of the communication together for you. It is searchable, you can add tags, and it works through a browser, downloaded software (like Outlook) and has apps for most mobile devices.

Who uses it? Wall Street Journal, Intuit, eBay, Harvard University. And the ABA TECHSHOW Board. To name a few. This IS the future of electronic communication.

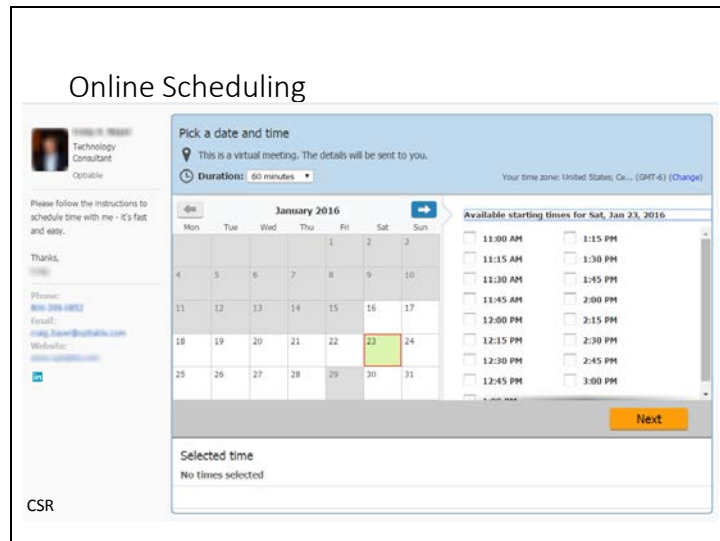
Slide 8



Do you have a blog with Wordpress, Blogger, Weebly or another platform? Are you manually updated your social media accounts when you have a new blog post? You can automate this process, though the “how” varies depending on your blog platform.

In Wordpress you can search for an add-on or widget that lets you automate the process. Weebly automatically asks if you want new blog posts to be fed to Twitter and Facebook, but not LinkedIn. IFTTT (If This Then That) will let you set up a recipe to share either WordPress, Weebly and any blog platform that generates an RSS feed to any social network.

If all of the above sounds a bit outside your comfort zone check out dlvr.it (Deliver It) <https://dlvr.it/pages/learn-more.php>. A free (for 5 feeds and 3 social pages/profiles) tool that monitors your blog for new content and shares it with your social networks. Simple to set up, and will help you spread the word about your blogging efforts.




We've talked about using an online scheduling tool to let clients book appointments automatically. If you don't have an assistant this can speed up processes significantly and empower the client and let you deal with more important matters.

SetMore <https://www.setmore.com/> free (unlimited appointments, 20 staff members, unlimited customers) online appointment calendar software helps you book and manage appointments via Web, Android, and iOS apps. It allows your clients to book appointments with you via your website, blog, social media page or mobile apps. Clients (and staff) can easily book appointments, reschedule or cancel, sent email or text notifications and more. SetMore syncs with Google Calendar bi-directionally so you won't double book! Don't worry, your Google calendar won't show to people using Setmore – only that the time slot is not available.

ScheduleOnce <http://www.scheduleonce.com/> starts at \$5 a month and offers bidirectional sync with Google Calendar, Office 365, MS Outlook and iCloud Calendar to show free/busy times. The ScheduleOnce booking page is customized for the firm and you can create daily/weekly workload rules so that there is a cap on the number of appointments, and other time management features. You can also review and approve each booking before it is scheduled. The service integrates with Webex and other common business tools. ScheduleOnce sends out up to three reminder notifications, plus followup messages to be automatically sent after the appointment. Customers can cancel/reschedule (based on your permission) and all parties are notified of any schedule changes. With even more features ScheduleOnce is seriously full featured for the price and easy to use.

New to MS Office 365 Business Premium users is Bookings <https://support.office.com/en-us/article/Say-hello-to-Microsoft-Bookings-47403d64-a067-4754-9ae9-00157244c27d> which provides a booking page, plus other options.


Evercontact



Outdated or missing contacts in your address book?
**Your Contacts Always
Up-To-Date Auto-Magically!**

[Start for Free Now >>](#)

[Find out more](#)



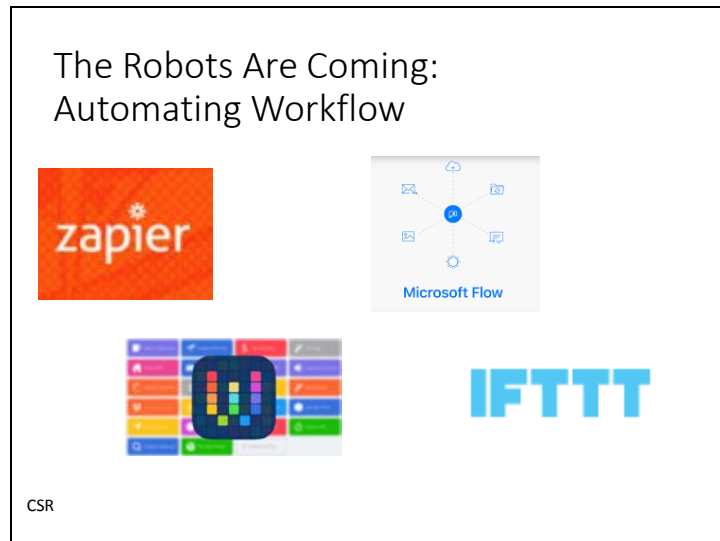
CSR

Evercontact <https://www.evercontact.com/> works with Gmail, Google Apps, Outlook, Office 365, iPhones, and CRMs like Salesforce and Highrise. The software automatically creates and updates contacts from email signatures and sends them to your address book. Basic service for a single user is free, though there are group and Pro plans with more bells and whistles. One premium feature called “Flashback” looks at your email for the past five years and collects the contact information (that is, if you hang on to email that long) for a one-time cost of \$99 or \$49 for one year of analysis of your email archives. Evercontact will show you what it is adding and give you the chance to accept or reject it — so it isn’t so automatic that it fills your contacts with people you don’t want there.



Yammer (www.yammer.com) started as a kind of Twitter for enterprise, asking “what are you working on?” and billing itself as a free private social network. Anyone from the same domain who signed up for an account could follow other people at that domain, and send short form updates. Yammer is restricted to only people with a verified company email address, which can be done by having the networked “claimed” by an admin. That admin can then add and remove users, and change configuration.

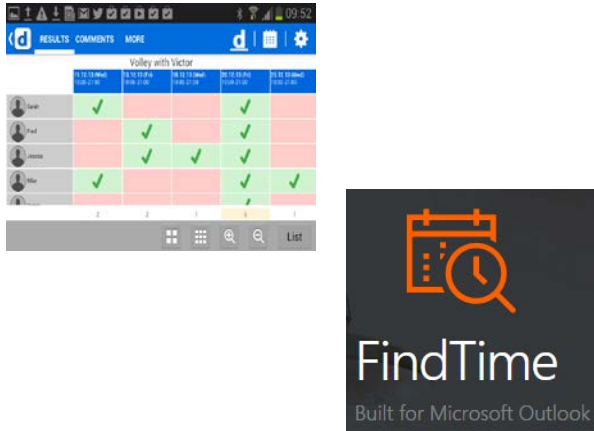
As the service has gained popularity they have add many new features and it was eventually purchased by Microsoft and is now available to anyone with Office 365. You can share files; create white pages for notes, polls, events, groups and much more. You can post privately and publically (within your domain restricted network).



Similar to IFTTT (If This Then That) <https://ifttt.com/> which connects applications, services and devices, Zapier <https://zapier.com/> offers 5 zaps for free that will run every 15 minutes with up to 100 tasks per month to make it easy for you to automate tasks between web apps. Zapier has over 500 Apps you can connect, with a focus on business services ranging from legal SaaS Clio to Basecamp to HelloSign. So, how can this work for you? Automatically save attachments in Gmail to Box. Create tasks and to-dos from new emails automatically. Create a Gmail label from new Clio matters or add new Clio contacts to a MailChimp list. A few clicks and you can automate activities that you either had to do manually, or just plain forgot to do.

Also for Office 365 there is Flow <http://www.theverge.com/2016/4/29/11535232/microsoft-flow-ifttt-competitor> and for iPad there is Workflow <http://www.appleworld.today/blog/2015/3/2/macsparky-releases-new-video-field-guide-for-workflow-app>

Initiate a Meeting with Doodle or FindTime



The image shows a screenshot of a Doodle meeting poll interface. The title is "Valley with Victor". The interface displays a grid of availability options for four participants: Carol, Paul, Amanda, and Peter. The grid has four columns representing different time slots: 11:15-11:45am, 11:45-12:15pm, 12:15-12:45pm, and 12:45-1:15pm. Green checkmarks indicate availability, while red squares indicate unavailability. For example, Carol is available at 11:15-11:45am and 12:45-1:15pm. Paul is available at 11:45-12:15pm and 12:45-1:15pm. Amanda is available at 11:45-12:15pm and 12:15-12:45pm. Peter is available at 11:15-11:45am and 12:45-1:15pm. Below the grid is a navigation bar with icons for home, search, and list. To the right of the screenshot is the FindTime logo, which consists of an orange calendar icon with a magnifying glass over it, and the text "FindTime" and "Built for Microsoft Outlook" below it.

CSR

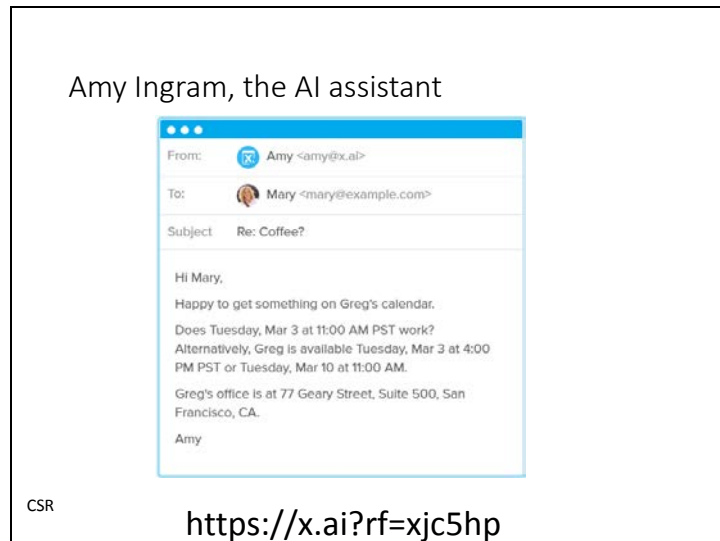
FindTime
Built for Microsoft Outlook

When you need to initiate a meeting, it can quickly turn into a mess of emails without a resolution. Scheduling tools can help take out some of the hassle, and one that really stands out is Doodle <https://doodle.com/>. Doodle creates meeting time polls you can send to recipients. Setting up an account is easy and free, and it's available for mobile.

For Office 365 users you can see calendars for people in the firm, but what about outside? A free plugin called FindTime works much like Doodle, is free, and builds Doodle-like functionality into Outlook: <https://findtime.microsoft.com/>

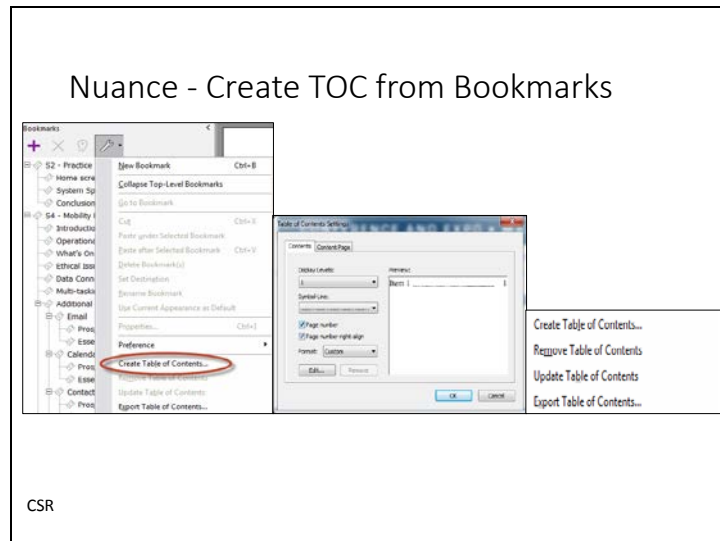


The Barisieur <http://www.joshrenoufdesign.com/new-gallery-5/av7fqhie9y5ptdbxr9s4i8rb65irqo> alarm clock and coffee brewer. It's currently available for preorder at [Indiegogo](https://www.indiegogo.com/projects/barisieur) for \$299 with an estimated ship date of September 2017 (a deal, considering that once it hits the retail market, it will cost \$420).



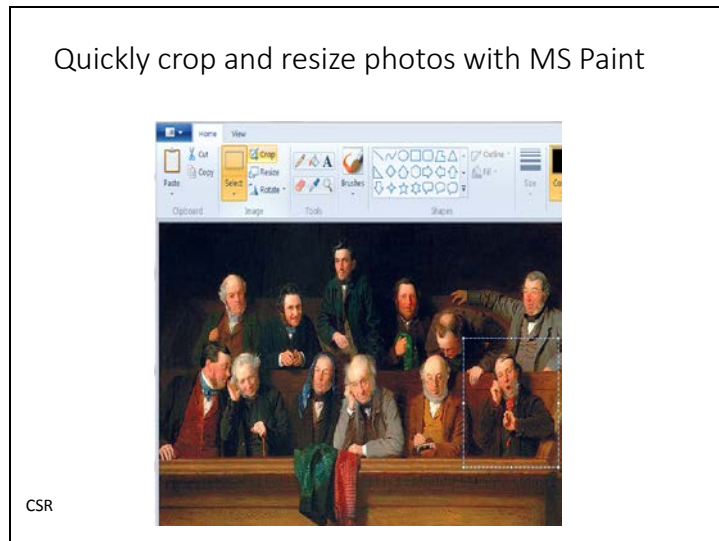
To get Amy for free go to <https://x.ai/how-it-works/>. I'm in group 262 on the waitlist, but if you click this link I'll get bumped up: <https://x.ai?rf=xjc5hp>
What's it like? See <http://www.geekwire.com/2015/testing-amy-what-its-like-to-have-appointments-scheduled-by-an-ai-assistant/>

Business at \$60 a month (coming soon) has Amy using your domain, unlimited meetings or the already available Professional at \$40 a month lets you have unlimited meetings and VIP contacts (10) can set up a meeting with you just by emailing Amy or Andrew.

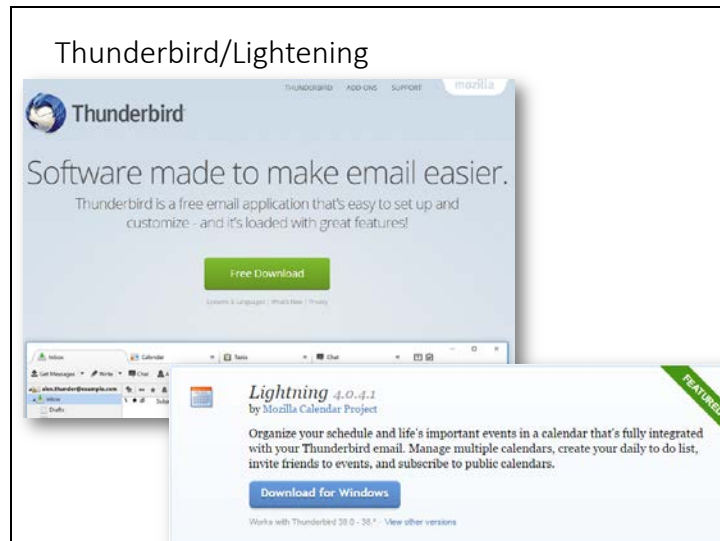


While bookmarks in a PDF document are great when it is being read on a computing device (tablet, desktop, laptop) if the document is printed out an actual table of contents is very helpful. When document authors use MS Word Styles the styles transfer to the PDF as bookmarks. In Microsoft Word using Styles will also let the document author generate an automatic table of contents in the Word document. The table of contents is hyperlinked, so in most cases that functionality transfers to the PDF. However, there are many times where the source documents have no table of contents or several documents are combined into a single PDF and the bookmarks must be generated in the PDF document. Nuance's PowerPDF Advanced <http://www.nuance.com/for-business/imaging-solutions/document-conversion/power-pdf-converter/advanced/index.htm> will create a hyperlinked table of contents from the PDF bookmarks you create.

In Nuance PowerPDF Advanced click on the bookmarks icon in the tools menu (or on "bookmarks" which appears in the Home tab in the Assemble group) and then click on the wrench symbol. Toward the bottom of the options that appear you can create a Table of Contents. Click to create the TOC and then use the settings to choose how it looks and how many levels deep to display. Once those decisions have been made click "ok" and then decided where you want the Table of Contents to be (first page, after the cover page, etc.) and a hyperlinked, automatically generated table of contents will be inserted. Once you have created the TOC you have options to update it, or export it as a separate document in PDF.



A very simple photo editor is already on your computer and it's free. It's MS Paint! You can open any image file in Paint and manipulate it. Use the select button to select the region. Then click "crop." Use can also click "resize" to enlarge selected portions or the entire image itself. Then save the file as new. Simple.



If you are relying on web-mail providers like AOL, your ISP (AT&T, Comcast), Yahoo! or Google to archive and save your emails – include client communication, you may be disappointed some day. Better safe than sorry and the free software email management software Thunderbird and companion calendar add-on Lightning, work with Windows, Mac OS, and are easy to set up to create either IMAP (bi-directional sync) or POP (uni-directional sync) accounts with your current webmail provider to preserve your emails – just in case!

Thunderbird <https://www.mozilla.org/en-US/thunderbird/> with the companion calendar Lightning <https://addons.mozilla.org/en-US/thunderbird/addon/lightning/?src=hp-dl-featured> from Mozilla.

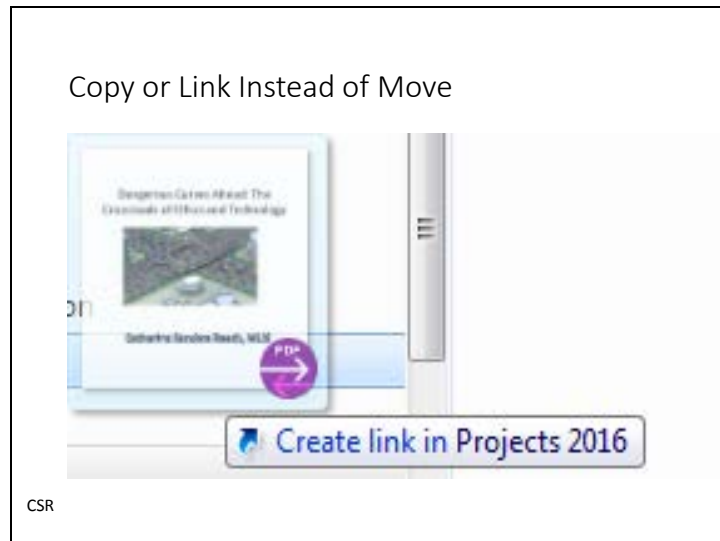


Acrobat Pro X (10) is no longer supported by Adobe Systems as of November 2015. It will still work on older version of Windows (not Windows 10), but will no longer be eligible for support or updates. Time for an upgrade! Your option from Adobe is to purchase a subscription for \$15 per month per user for Acrobat Pro DC, which comes with online document storage, esignatures, a mobile app and compatibility with Windows 7/8/10 and Mac OS X v10.9 and v10.10. Or you can buy the software only for \$449. So, for a tool that manipulates PDF documents, redacts, Bates stamps, integrates with MS Office, and converts PDF to Word documents are there options?

Nuance PowerPDF Advanced is a powerful and functional Windows-only application for converting scanned and digital documents to PDF, as well as manipulating PDF documents. Nuance has been making a PDF converter since 2003 and until recently the PowerPDF Advanced was only available as a five and up user license pack. Now the software is available for individual purchase for \$149. So, at 1/3 of the price, how does this software measure up to Adobe Acrobat Pro?

At a feature by feature level the Nuance product easily competes with Adobe Acrobat Pro. In some cases there are slight differences, other features lack some of the bells and whistles that Acrobat Pro provides, and some of the Nuance features are huge wins for law firms.

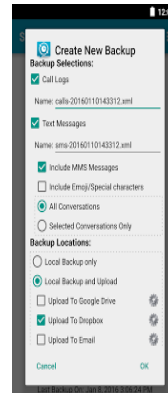
Interested in learning more about Nuance? Watch our How To... Get More Out of Your PDFs with Nuance (<http://tinyurl.com/muv7f2f>)



In Mac and Windows if you drag a file in Explorer or Finder to another folder it moves the file. Sometimes, though you just want to put a copy of the file in another folder. If you hold down <ctrl> in Windows or <command> on the Mac and drag a file it will instead create a copy of the file. In Windows you want to create a shortcut to a file in another folder hold down <ctrl> + <Shift> to create a shortcut to the file instead of moving it.

Backup text messages

- For Android: Carbonite or SMS Backup and Restore app
- For iPhone: AnyTrans, iRefone or set backup to iCloud, or iTunes



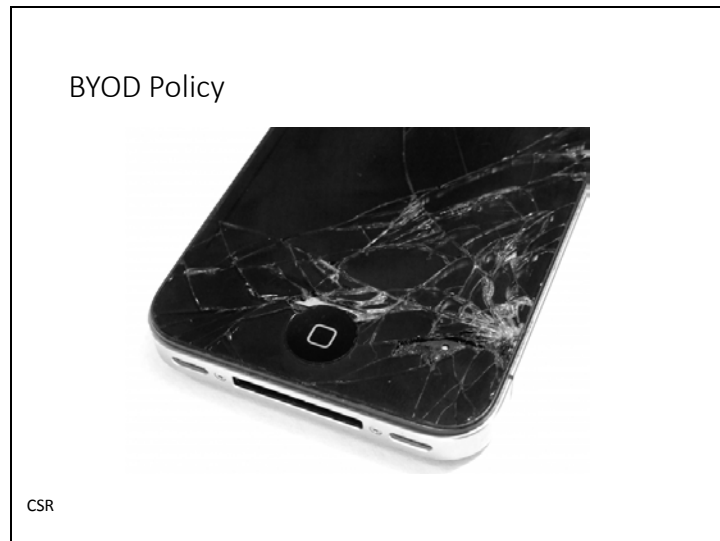
CSR

If you are texting with clients and that is part of the correspondence record are you able to save it to the file? Here's how on iPhone:

<http://www.irefone.com/backup-text-messages-on-iphone.html> or get apps.

In Android SMS Backup and Restore backs up text messages to Gmail.

<http://www.howtogeek.com/112852/how-to-backup-your-text-messages-to-your-gmail-account/> or use Carbonite: <https://www.carbonite.com/en/apps/call-log-sms-backup-restore/faq/>



Do you let attorneys and staff use their own phones and laptops to do firm work? Can they access your network, store client files, or store voicemails from clients? What if the phone was lost or stolen? Or the person quit the firm? Your firm needs to have a BYOD policy, as well as a security policy, an incident response plan, and technological ways to reduce risk.

See this sample policy:


<http://www.shrm.org/templatestools/samples/policies/pages/bringyourowndevicepolicy.aspx>

And an article on Incident response plans: <http://senseient.com/wp-content/uploads/What-Will-You-Do-When-Your-Law-Firm-Is-Breached-1.pdf>

And a sample database of policies at Sans.org: <https://www.sans.org/security-resources/policies/>

Mobile VPN

Why should I use PIA?



Protect Your Privacy and Identity

Browse **anonymously** with a **hidden ip** and enable **wifi security** with our **VPN service**. Anonymous VPN tunnels are the best way to protect your privacy, and Private Internet Access has the best **VPN service**.

Unblock Censorship Filters

Enjoy **unrestricted access** even when you are abroad! Stream iPlayer by BBC, Demand5, Facebook, Youtube, P2P and more with our **anonymous VPN tunnel service!**

Connect Through Our VPN Tunnel in Seconds!

Connect immediately to our private VPN service with our **instant vpn setup**. Featuring one-click installers, your VPN service will be enabled immediately. **Buy a VPN account!** to get started!

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Do you use free wifi on your laptop, phone or tablet? Do you also use that device to store and transmit client confidential information? Or do online banking? Free or even limited access wifi (like hotels or Oingo hotspots) are notoriously insecure. There are a few ways to protect yourself, including using your phone as a hotspot, thus going through your mobile data provider, getting a mifi card for mobile internet access, or using a VPN (Virtual Private Network) for mobile devices like paid service “Private Internet Access” for a mere \$3.33 per month. There are free ones, but they are often slow and ad-based.

See this GroovyPost How to for more: <http://www.groovypost.com/howto/stay-safe-public-wi-fi-hotspots/>

Add Social Links to Your Signature Block



Catherine Reach
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lpmt.chicagobar.org | 321 S Plymouth Court

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CSR

You probably email more people every day than you realize. If you have a robust webpage, blog or social media presence highlight those resources in your signature block and you can invite people to visit your business's Facebook page, your Twitter feed and LinkedIn profile every time you send them an email. You can even use a custom-built signature from companies like Wisestamp who make free templates <http://www.wisestamp.com/>. And if you want to splurge a little, you can pay a bit more to get something that is uniquely "you" but still looks professional.

Body Language

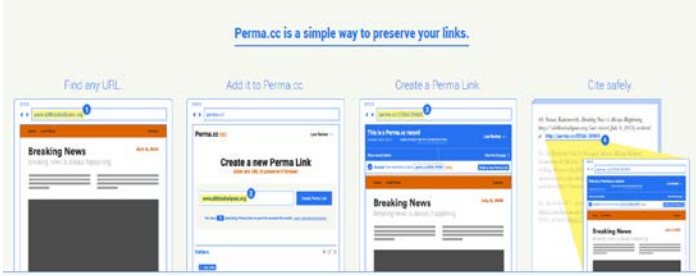


CSR

People pick up physical communication cues as well as verbal. Do you know what your body language is saying? It may be different from your words. Be aware of some of the biggest body language mistakes: <http://www2.forbes.com/business/10-worst-body-language-mistakes/>

Avoid link rot – cite with Perma.cc

Perma.cc is a simple way to preserve your links.



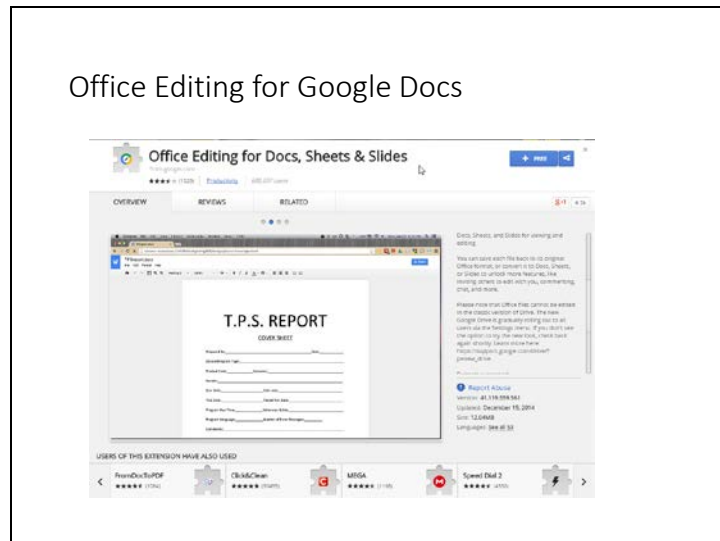
IT'S FREE!

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Over 20% of cited links may be dead or otherwise inaccessible after one year. Over 50% of cited links in Supreme Court opinions no longer point to the intended page. To combat this, the Harvard Library Innovation Lab developed Perma.cc <https://perma.cc/>. It preserves links in a permanent collection. Simply copy and paste your link into the cite to create a citable permalink. Free to use.

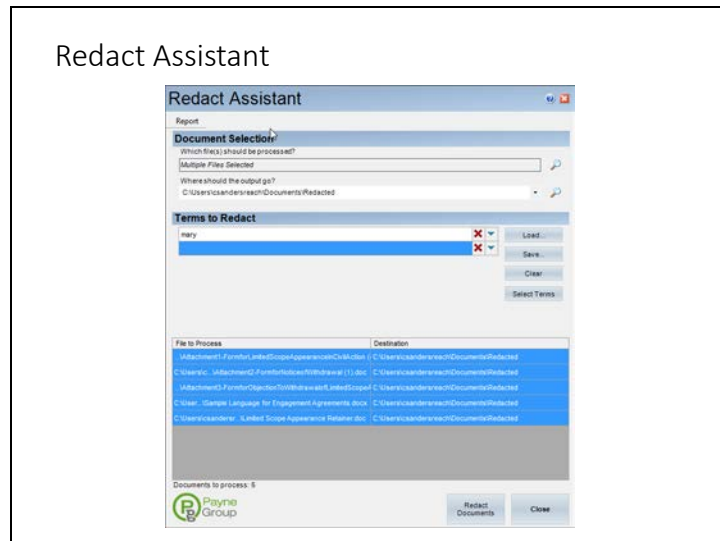


Lookout Mobile security for iOS, Android and Kindle is free for basic use or \$30 for Premium. It will locate your device, remotely wipe it, lock out users, backup your files, run antivirus/antimalware scans on new apps and app updates, and much more. You can load it on all your devices and manage it from a secure website. See more at <https://www.lookout.com>

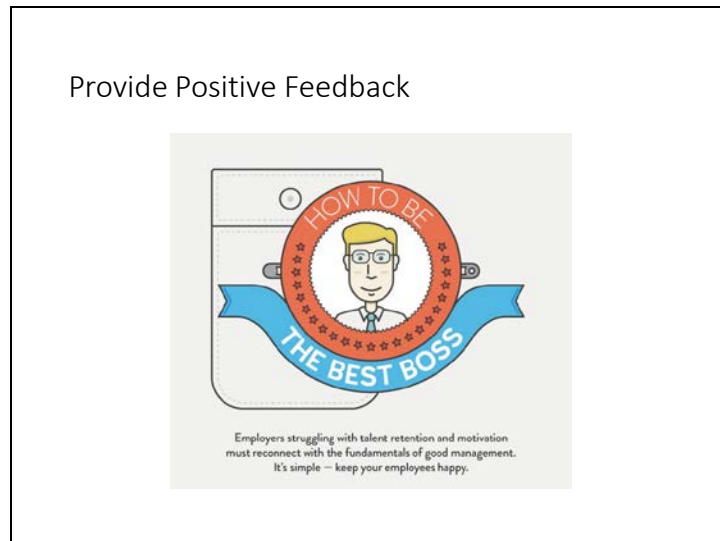


View and edit Microsoft Word, Excel, and PowerPoint files -- without needing Office installed on your computer. Once the extension is installed, Office files that you drag into Chrome, open in Gmail, Google Drive, and more, will be opened in Docs, Sheets, and Slides for viewing and editing. You can save each file back to its original Office format, or convert it to Docs, Sheets, or Slides to unlock more features, like inviting others to edit with you, commenting, chat, and more. Please note that Office files cannot be edited in the classic version of Drive. The new Google Drive is gradually rolling out to all users via the Settings menu. If you don't see the option to try the new look, check back again shortly. Learn more here: https://support.google.com/drive/?p=new_drive. Formats supported: .doc .docx .xls .xlsx .ppt .pptx

<https://chrome.google.com/webstore/detail/office-editing-for-docs-s/gbkeegbaiigmenmfjclcdgdpimamgkj>



From the company that brought you Payne's Metadata Assistant comes Redact Assistant <http://www.thepaynegroup.com/products/redact/>. If you need to securely redact documents for efilng and you have been drawing black boxes over the text to be redacted in MS Word, printing it out and scanning the document to PDF to upload then you should really look at this \$45 software application. Redact Assistant adds a button to Microsoft Word and Excel to let you redact from the document, or you can do a batch redaction over multiple documents. The features are lean – keyword search and some limited pattern matching – but to follow court rules they are sufficient. The biggest drawback to this software is that it does not create a new document and will write over and permanently alter the original if you don't save it with a new name. Your new workflow could be to finalize a filing in MS Word, redact it (in Word), save it as a PDF and efile in one clean motion. Tools built into Nuance Power PDF and Adobe Acrobat Pro offer more robust features for redaction but at a significantly higher cost.



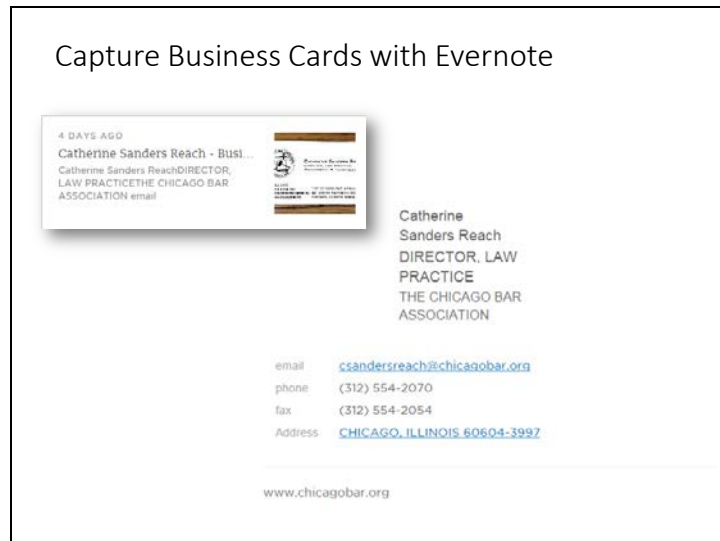
The infographic from Inc. on “Five Simple Things Beloved Bosses Do” <http://www.inc.com/laura-montini/infographic/how-to-be-the-best-boss.html> points out that study after study reveals that money is often not the motivating factor in job satisfaction. Most people say that they want recognition for their work. From a Glassdoor study in 2013 61% of employees whose bosses focus on their strengths are engaged in their work, which is double the national average for employee engagement.

The second step in this article suggests bosses “praise good work”, which is more likely to produce consistently good work and increases employee motivation. However, few employees are perfect and sometimes a manager/supervisor/boss has to criticize work or correct errors. You can still do this and keep their motivation to do well by a.) focusing on being constructive in feedback, and use it as a learning opportunity. This takes a little time and effort, so don’t just yell at an employee – think about how to turn a negative into a learning experience b.) try to make sure that for every time you have to correct or reprimand an employee you have praised their work at least five times before that. If the only time you ever offer feedback is when it is negative, even if the employee is generally a great employee, that is all that will stick with them. Try to think of something positive to say every day.

Encrypting Cloud File Storage



Whether you use a third party encryption tool like Viivo (<https://viivo.com>) or BoxCryptor (<https://www.boxcryptor.com/en>) or Sookasa (<https://www.sookasa.com/>) that encrypt files before you store them with a cloud storage provider, or you use a “zero knowledge” storage like SpiderOak, the documents lawyers create or receive have confidential, sensitive, and personally identifiable information. Do you want to trust your files to an online storage like Dropbox that appears in the news repeatedly for being hacked, exposing passwords and other security issues without first adding a layer of security? Whether you choose a safer alternative or add encryption remember that sharing the documents breaks the encryption, so there is not yet easy, low cost perfect security paired with perfect usability.



From John E. Harding – Using Evernote To Import Business Cards Into Your Contacts

Step One: Lay a business card down on a flat surface.

Step Two: Launch Evernote on your smartphone, click on the Camera icon, then select the Business Card option.

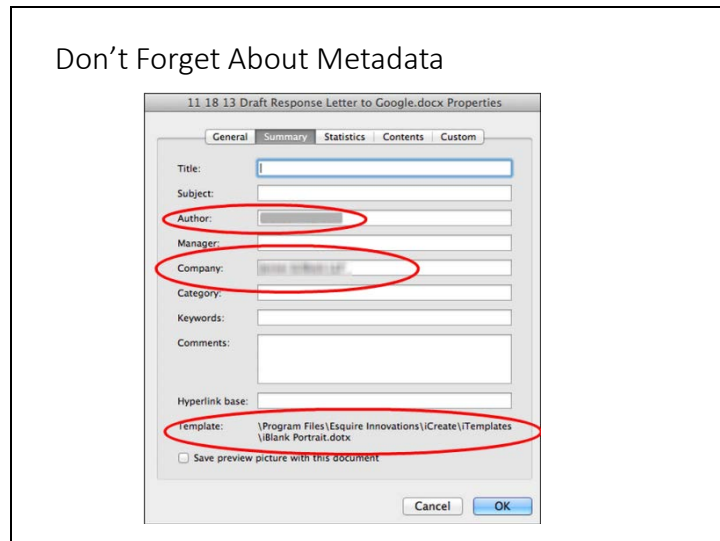
Step Three: Move your camera over the business card until Evernote detects it and then automatically takes the picture for you.

Step Four: Evernote then reads the business card and imports all of the information as a new contact in your Evernote account. Nothing for you to do but watch.

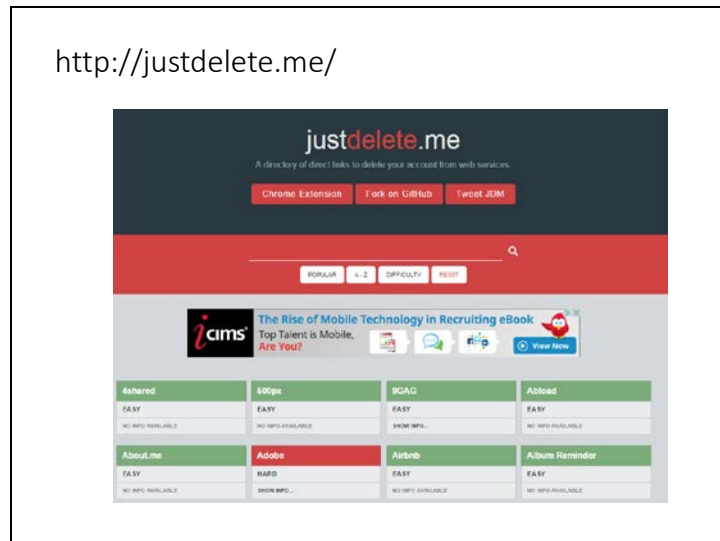
Step Five: Tell Evernote to send the information to the Contacts app on your phone. Evernote completes the task immediately, and that biz card buddy's information is now in your system.

Step Six: Synchronize you phone contacts with whatever other Contact program(s) you use. Nothing could be easier.

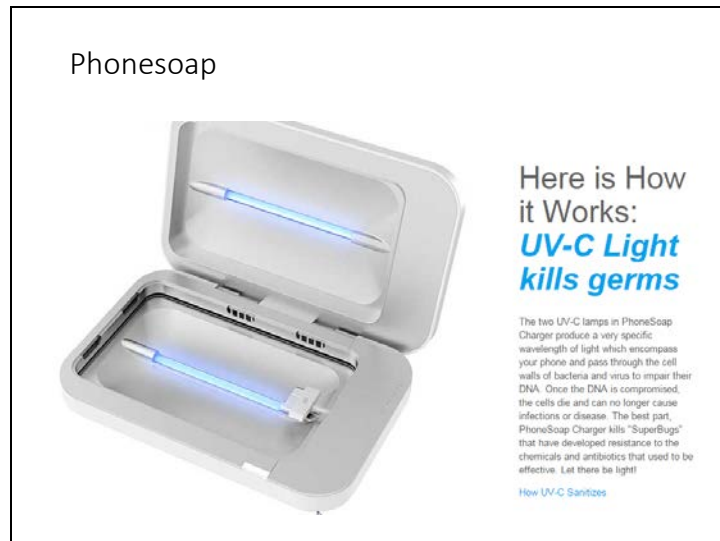
Bonus: If you have a LinkedIn account, Evernote has a one-click feature at the end of the business card scan so that you can connect on LinkedIn with your new business card buddy.



Although we do not have an ethics opinion in Illinois on metadata specifically, that doesn't mean you can forget about it! A recent article from the Droid Lawyer <http://thedroidlawyer.com/2014/12/a-lesson-for-lawyers-about-metadata-from-the-mpaas-attempt-to-revive-sopa/> points out how companies actively look at metadata (especially if the company you are pursuing is Google). Be aware of what you are sending out and how it might be revealed or used. If you are unfamiliar with metadata or unsure how to get rid of it check out the archived CBA program and materials on Metadata, Redaction and Other (Tech) Bumps in the Night at <http://tw.gs/zxw5E3>.

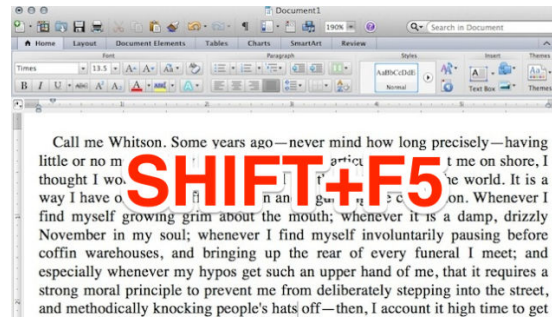


Ever tried to figure out how to delete your account from a web service you've signed up for but no longer use? Like Facebook or Twitter or Crashplan? It can be frustrating to find exactly *where* you are supposed to go and the website JustDeleteMe <http://justdelete.me/> can help. The site not only links to the place on the service to remove your account but also color codes the sites by how difficult it is to remove your account. In a number of cases difficulty level is listed as "impossible" so click on the "show info" link to find out why. Useful!

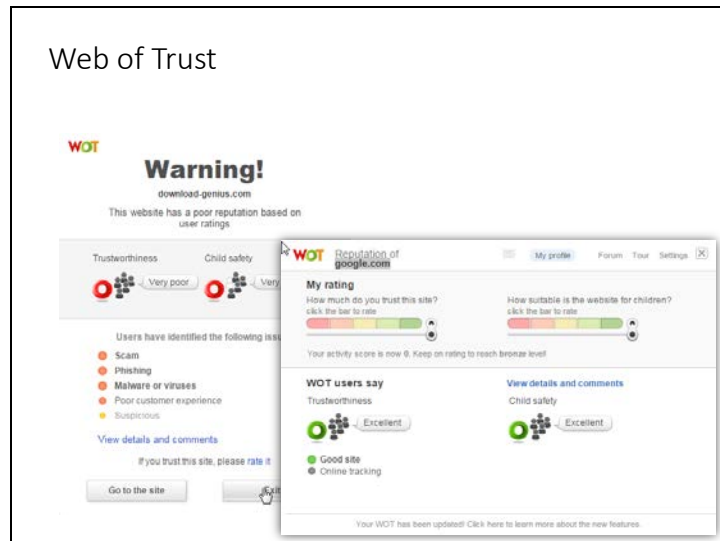


Face it, your phone is probably gross. I don't want to tell you how gross, but trust me. Disinfectant wipes don't mix well with smartphone, but thanks to (more) technology you can charge your phone AND zap it with bacteria killing UV rays at the same time. The UV bulbs have 8,000 hours of life and the device is available for \$60 at <https://www.phonsoap.com>. Works with tablets too (\$120)

Jump to Edits with Shft-F5

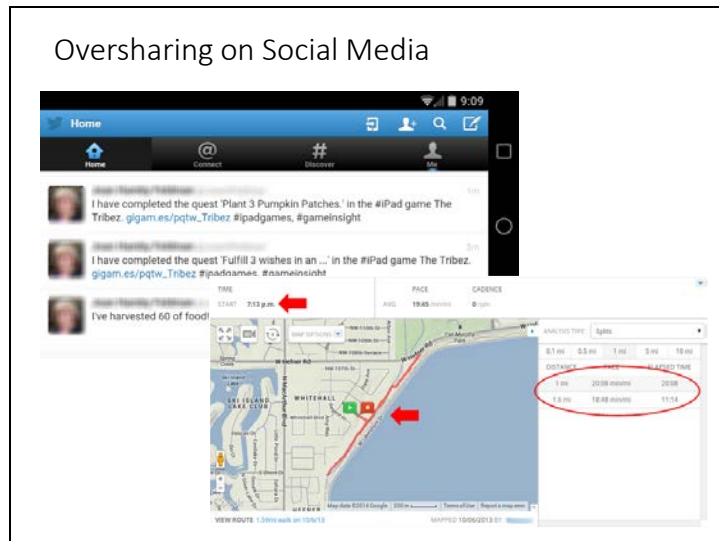


Microsoft Word is packed with all kinds of great keyboard shortcuts, so a bunch of the best often go under the radar. Tech blog Digital Inspiration has a collection of many of these lesser-known shortcuts, including using Shift+F5 to instantly cycle between your most recent edits. When you're digging through a massive word document, Shift+F5 is handy to see what you've edited most recently. Likewise, if you use it right when you open a document, you're taken to your most recent edit.

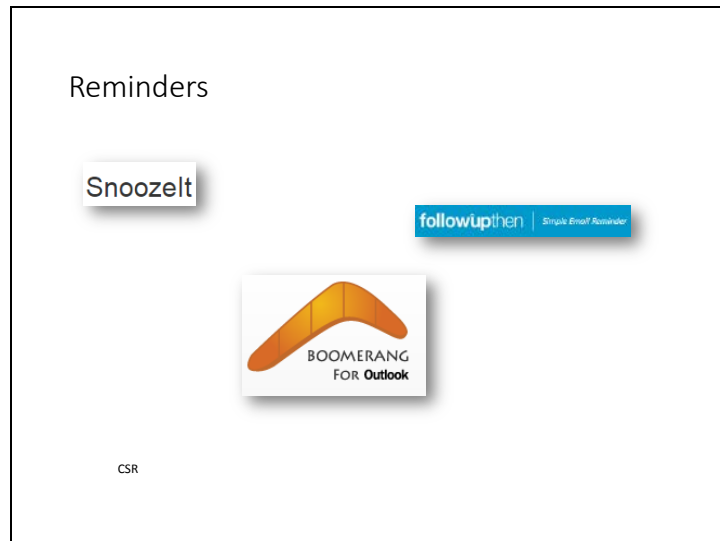


Web of Trust (<https://www.mywot.com/>) is a browser extension that works on most browsers that rates website links to show you which sites people trust for safe surfing, shopping and searching. Similar to McAfee’s Site Advisor, WoT employs its user community to rate the sites based on their real life – and real time – experience. All links on the web are identified with a green, yellow or red dot to identify if the site is rated safe. If you click on a link in the browser or in email that has been deemed unsafe WOT will not let your browser open the site until you verify that you understand the consequences.

In addition to the browser extension the tool is also available as an enterprise add on so that all the users on your law firm network use it.



Whether you use social media as a marketing tool, or you try to keep it “personal” your social media presence says a lot about you. Be aware of how it works and what may be going out under your name without you knowing. For instance, did you know that others can see what you “like” in Facebook? It actually appears in their newsfeeds, but you will never see that from looking at yours. So, mind what you “like”. Also, tying apps together leads to oversharing – you may be promoting your jogging route, your Candy Crush saga prowess, the number of calories you’ve eaten today or where your next trip will be. Of course, there are far more serious consequences for people who are willing to post negative things about clients, judges, or other lawyers. Or about personal behavior that is unbecoming of a lawyer. Your reputation, and possibly your license, is at risk.

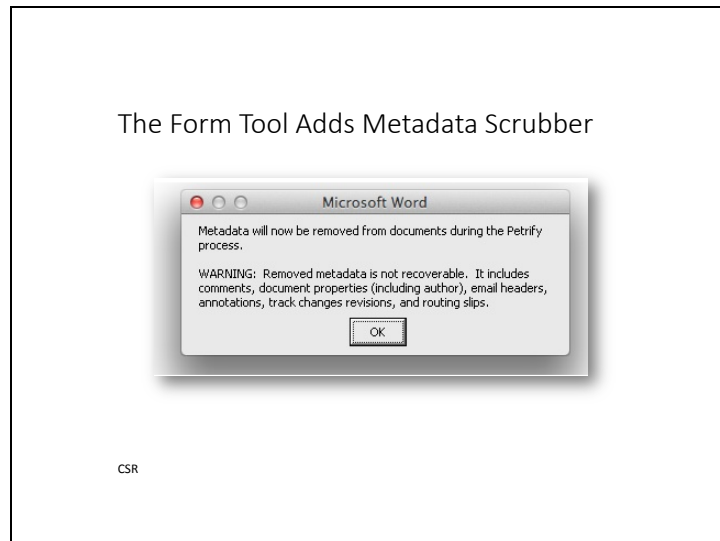


If all eight fingers are occupied by strings it may be time to consider alternative ways to keep up with reminders. Followupthen (<http://www.followupthen.com>) is a fast, simple, free program that works with any email on any device. Simply send an email (or forward an email) to `xxtime@followupthen.com` where `xxtime` is the time you want to be reminded. Consider – forward an email that doesn't need action for two weeks to `2weeks@followupthen.com` and folder the email. In two weeks the email will be sent to you with a note to follow up. Or send yourself a quick email reminder – something that doesn't sit in your inbox but alerts you to take action. When you receive your reminder email you can set another reminder with a click.

Take your email productivity to the next level. FollowUpThen Premium gives you SMS reminders, calendar integration, customized followups for your recipients, attachment support, a handy web interface for followup management and more. Upgrade for \$5 per month or \$48 per year.

Boomerang<http://www.boomeranggmail.com/> is available as an MS Outlook addin or for Gmail. Similar to Followupthen, Boomerang acts like a snooze button for email. Select a message and choose a time the email should reappear. The email is moved to a storage folder (called Boomerang). Boomerang can even return the message flagged for follow up and marked unread. The MS Outlook addon costs \$30 as a one time fee, and is free for Gmail. Also, a more feature rich version for those with Office 365 was just announced.

Similarly TechHit (makers of SimplyFile and EZDetach) are rolling out Snoozelt (<http://www.techhit.com/Snoozelt/>) to let you act on a message in the future by hiding it from your inbox and having it re-appear on a date you choose. Snoozeit is \$40.



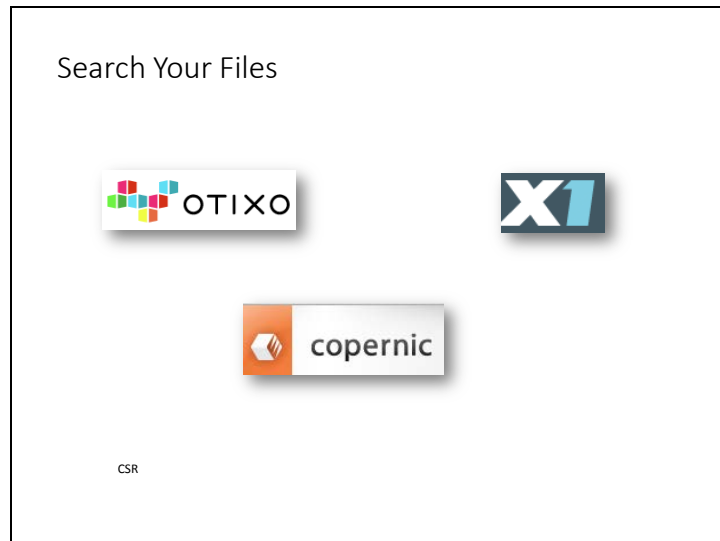
Metadata removal tools for smaller offices are usually stand alone products. But, now The Form Tool Pro (\$89) has a built in scrubber so that when you fill a form, “petrify” it to generate a final document, it will also scrub the document for metadata. How big of a deal is metadata?

Well, everyone from big business (<http://googlepublicpolicy.blogspot.com/2014/12/the-mpaas-attempt-to-revive-sopa.html?m=1>) to big government

(<http://www.workshare.com/blog/posts/the-general-election-metadata-blunder>) wishes they were more careful to remove it!

See more from The Form Tool:

<http://www.theformtool.com/newsroom/automatic-metadata-scrubbing-is-new-feature-in-theformtools-office-productivity-software/>



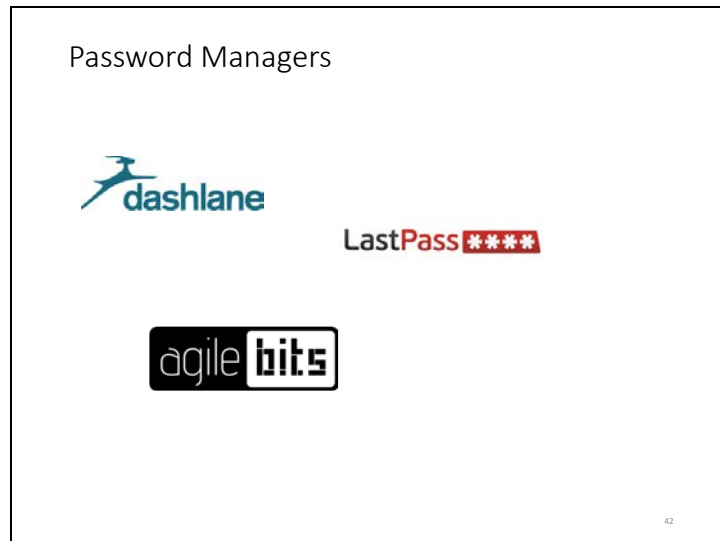
X1 <http://www.x1.com/> and Copernic <https://www.copernic.com/> are two sophisticated desktop search engines that make finding content on your local machine, networked drives, or external drives a snap. Super-fast, imbued with bells and whistles, and reasonably priced, these tools have been around for some time. But, the developers have not rested on their laurels. Both of these super powered search tools now offer mobile apps, to let you search your data on the go.

With myCopernic On the Go! you can search your computer remotely from your smartphone, iPad or remote PC (sorry, Windows only). You will need to install the myCopernic Connector for it to work. Then from your device you can login to myCopernic On the Go! to access search for your files. You will need Internet access, and functionality is delivered through a web-based app, not a native app. Because of that it works on just about any device with a browser, including BlackBerry. This service costs \$9.95 annually, in addition to the \$50 for Copernic Professional Desktop Search (though it is not necessary to have Copernic Professional Desktop installed).

X1 offers X1 Mobile Search. A native app for iPhone or iPad, this free app will let users search their Macs or Windows PC with or without having X1 Professional Client installed (although they do mention it works *best* with X1 search). X1 Mobile Search also lets you view and display files, share files, and download files for offline use. Setup includes downloading the X1 Mobile Search app from the iTunes store and installing the Windows or Mac version of X1 Mobile Connect. Et voila. Connections are protected by x.509 PKI based two-factor authentication and RSA powered SSL/TLS.

Another option is Otixo (<http://otixo.com>), which lets you connect your cloud services, such as document storage service, Evernote, and even your desktop and mobile devices to search, sync,

share and move. It creates a dashboard for your files, no matter where they happen to be. The free version provides search and connections, premium plans add sharing files, drag and drop between clouds, and more!



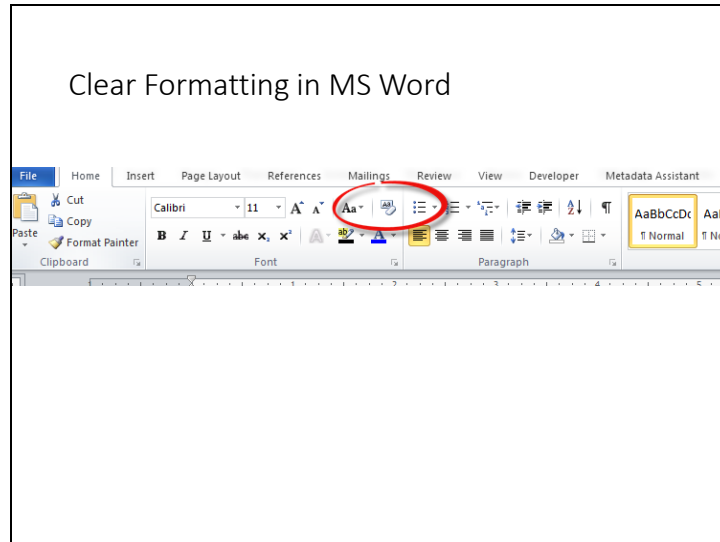
You may have heard of LastPass, Keepass, Roboform or 1Password to manage your personal passwords as a great way to generate new, complex and unique passwords that are vaulted and recorded if you are a sole practitioner. The password for your password manager will need to be available to your successor. If you are in a larger firm you have options as well for “enterprise” password managers.

LastPass Enterprise helps each person by managing their passwords, and the firm would have better password security and also central storage of server and device passwords. LastPass Enterprise costs \$24 per user per year <https://lastpass.com/enterprise/enterprise-pricing/>

Zoho Vault, their online team password manager, lets a firm store passwords, share common passwords, track user actions, control access by password revocation, define password policies and more. The price for the professional plan is \$4 per user per month with a minimum of 5 users (there are plans suited for smaller groups) <https://www.zoho.com/vault/pricing.html>

CommonKey is a competitor and vaults all team passwords for individuals and shared passwords. The product is free for teams of three, \$2 per user per month for larger teams. <https://commonkey.com/pricing>

Slide 43



In Microsoft Word 2007-2016 you can easily clear all formatting from a document. If you've copied and pasted from other documents or the web you know that formatting trails with the copied text and can wreck havoc on a new document. If you want to simply remove all document formatting to start anew select the text you want to remove formatting from and click on the icon in your home tab in the font group that has an eraser - et voila!

Encrypt Your Hard Drive

BitLocker Drive Encryption

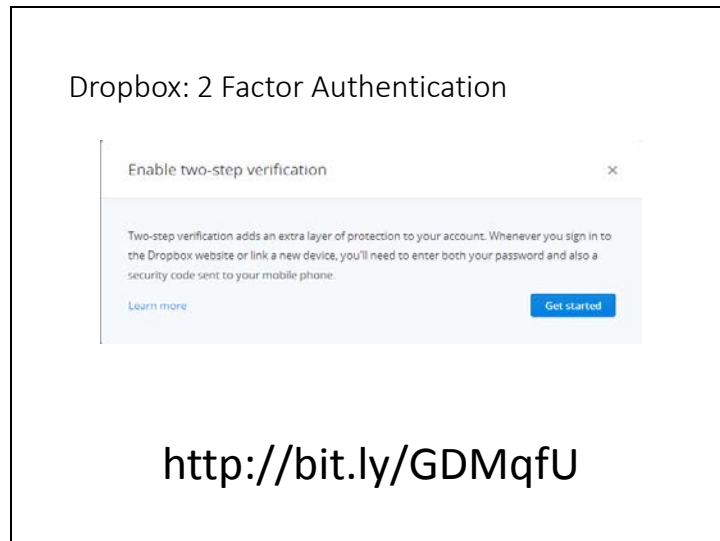


Watch this video to learn how BitLocker can help keep your data safe. (0:52)

FileVault Disc Encryption

The image contains two screenshots. The left screenshot shows the BitLocker Drive Encryption control panel in Windows 7, with a play button icon and a video player interface. The right screenshot shows the 'Security & Privacy' system preferences window in Mac OS X, specifically the 'FileVault' tab, which has a 'Turn On FileVault' button.

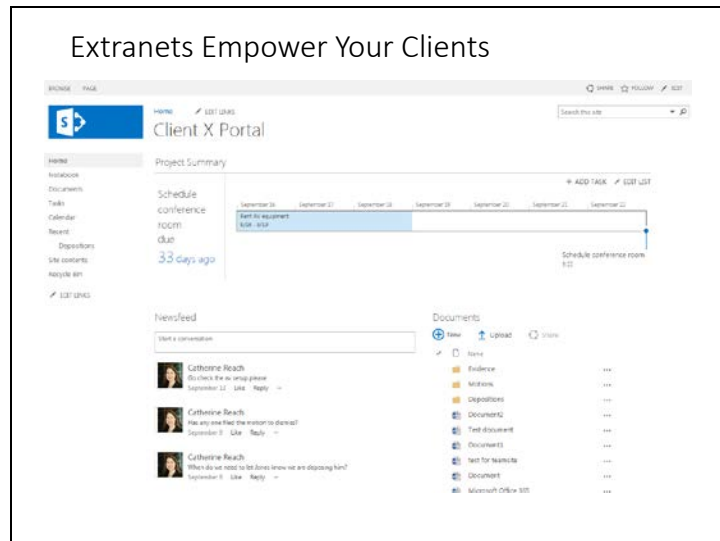
System encryption makes the data of a desktop or laptop computer inaccessible or illegible without a passkey regardless of the application in which the file was created. The passkey should be a complex, yet memorable (to you) combination of letters and numbers. Data encryption should be standard procedure for mobile computing users. Windows 7 Enterprise and Ultimate and Windows 8.1 Pro & Enterprise and Windows 10 come with BitLocker to encrypt the hard drive (most every version of Windows 7 and 8 let you encrypt files and folders). In current versions of the Mac OS X use the available FileVault to apply disk level encryption. If you don't have the right operating system there are other reliable encryption products encrypt the hard drive of a machine such as the free [VeraCrypt](https://veracrypt.codeplex.com/) <https://veracrypt.codeplex.com/> can encrypt the disc, as well as peripherals such as external hard drives and thumb drives, and runs on Windows, Linux, Ubuntu and Mac. PGP, the venerable encryption solution, encrypts Windows and Mac OS, as well as peripherals, for a reasonable price.



If you are going to store important or confidential documents in your Dropbox account, you need to use available tools to protect it from being accessed by anyone else. To this end, you need to use 2 Step Authentication to secure access to your Dropbox account.

2 Step Authentication also called Two Factor Authentication (2FA) requires two things for someone to gain access to your Dropbox account: 1) Something you know i.e your password and 2) something you have. In this situation that something is a changing access code that is generated by Dropbox and sent to your smart device or generated using an app such as Google Authenticator.

You can set up two factor authentication in many online services. To see more read: <http://lpmt.chicagobar.org/set-up-two-factor-authentication-what-are-you-waiting-for/>



Extranets are another way to give clients access to documents and work product for their review, approval, and collaboration. An extranet is essentially an online document repository that allows access to files and folders based on password authentication. Some document management programs, such as NetDocuments (www.netdocuments.com), offer extranet functionality built in to the application, making it easy to store, search, and share document within the firm and with clients. Many of the SaaS law practice management products have built in client portals (MyCase, Cosmolex, Actionstep, Clio, RocketMatter, ZoloSuite, etc.). You can also use project management tools like Basecamp or Trello.

Users of Office 365 should investigate the Groups function, which automatically creates a distribution group, document library, OneNote notebook, and a Planner space. In the Outlook your Groups contains all the messages and a shared calendar. If you using your group in Yammer you will use Yammer conversations. For more information see: <https://support.office.com/en-us/article/Learn-about-Office-365-groups-b565caa1-5c40-40ef-9915-60fdb2d97fa2> . Or you can just use Planner, SharePoint, or other group functions in Office 365.

The screenshot shows a webpage titled "Help With Security Policies - SANS" with a sub-header "Information Security Policy Templates". Below the header is a welcome message: "Welcome to the SANS Security Policy Resource page, a consensus research project of the SANS community. The ultimate goal of the project is to offer everything you need for rapid development and implementation of information security policies. You'll find a great set of resources posted here already, including policy templates for twenty-seven important security requirements." Below this is a section titled "Find the Policy Template You Need!" with a list of categories: "General", "Network Security", "Server Security", "Application Security", and "Old/Retired". At the bottom, a disclaimer states: "There is no cost for using these resources. They were compiled to help the people attending SANS training programs, but security of the Internet depends on vigilance by all participants, so we are making this resource available to the entire community."

Does your firm have a security policy? Unfortunately the weakest link in security is often the end user. Many firms have not gotten around to creating or issuing security policies to firm staff. If you need some help with writing a policy, or don't know where to begin, the SANS Institute has developed the SANS Security Policy Project. They have compiled sanitized security policy templates from large organizations and share them in .PDF or .DOC format. The policies cover everything from HIPAA to mobile to email and provide a great start for a firm looking to increase awareness of security best practices. See: <http://www.sans.org/security-resources/policies/>

Thanks!

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