

OSB Professional Liability Fund presents

Up Your Game: Harnessing Technology to Improve Your Practice

Thursday, September 1, 2022
10:00 am – 11:30 am

MCLE ID 91786
1.5 Practical Skills Credits

Speakers: Rachel Edwards
PLF Practice Management Attorney

Monica Logan
PLF Practice Management Attorney

Isaac Alley
PLF Practice Management Attorney



Professional
Liability Fund

CLE Materials

- [Speaker Bios](#)
- [PowerPoint Slides](#)
- [Presentation Resources](#)

Speaker Bios

Rachel Edwards

Rachel Edwards received her BA from the University of Washington in Seattle and her JD from Willamette University College of Law. She is a member of the Oregon State Bar, Oregon Women Lawyers, Multnomah Bar Association, American Bar Association, a former elected board member of the Washington County Bar Association, and a founding subcommittee member of the New Lawyers Division of the Washington County Bar Association. She has served as a Classroom Law Project Mock Trial Volunteer Judge, an Oregon Department of Human Services Adoption Contract Vendor Attorney, and a volunteer for the Convocation on Equality and the St. Andrew Legal Clinic. Prior to joining the Professional Liability Fund in 2016, Ms. Edwards was in private practice for four years. Her areas of practice included Social Security disability, family law, adoption, and estate planning cases. In her role as a practice management attorney for the PLF, Ms. Edwards provides practice management assistance to Oregon attorneys to reduce their risk of malpractice claims and enhance their enjoyment of practicing law. Her assistance is free and confidential.

Monica Logan

Monica Logan is a practice management attorney at the Professional Liability Fund. She provides confidential practice management assistance to Oregon attorneys to reduce their risk of malpractice claims, enhance their enjoyment of practicing law, and improve their client relationships through clear communication and efficient delivery of legal services. Ms. Logan grew up in San Jose, California and moved to Oregon to attend Concordia University in Portland where she received her BA. She obtained her JD from Willamette University College of Law. Ms. Logan is a member of the Oregon State Bar, Oregon Women Lawyers, the Multnomah Bar Association, and the American Bar Association. She previously served as treasurer of the Mary Leonard Chapter of Oregon Women Lawyers in Salem. Before joining the PLF in 2021, Ms. Logan was in private practice for four years, working with clients in family law, elder law, and estate planning in various counties in Oregon. She practiced in Roseburg, Klamath Falls, Coos Bay, Salem, and the Portland area.

Isaac Alley

Isaac Alley is a Practice Management Attorney with the Professional Liability Fund. In his role as a PMA, Isaac provides practice management assistance to Oregon attorneys. His assistance is free and confidential. Isaac is a member of the American Bar Association and the American Immigration Lawyers Association. Isaac joined the PLF in 2022. Prior to that, he served as the Managing Attorney for a non-profit law firm that serves impoverished immigrant community members in Oregon and Southwest Washington. Isaac began his career in private practice as an immigration attorney in Portland, Oregon for a regional law firm. Isaac received his BA from Portland State University and his JD from the University of Washington School of Law.

Up Your Game:

Harnessing Technology to Improve Your Practice

Presented by:
Rachel Edwards
Monica Logan
Isaac Alley
Practice Management Attorneys

OSB Professional Liability Fund

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Office Space

- Hourly, daily, or monthly office rentals
- Conference room separate or included
- Other amenities: receptionist, Wi-Fi, parking space, breakroom, and more



3

Docking Stations

- Interoperability
- Power
- Reduce strain on users
- Transform laptop into workstation



4

Communication

Lighting



NEEWER®



Noise-Cancelling Headphones



ANKER

SONY



5



Hybrid Meetings

- Hybrid (in-person and videoconference) meetings more common
- Video and audio-conferencing equipment is helpful



Meeting Owl 3



Logitech®


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Dual SIM Cellphones

- Host 2 numbers on 1 cellphone
- Use for personal and business
- Check with brand and carrier for specifics

SAMSUNG Galaxy S22 Ultra

Google Pixel 6 Pro

 iPhone 13 Pro

7

Voice Over Internet Protocol (VOIP)

- Call routing
- Cellphone, desk, or computer can be used as phones
- Plethora of additional features

RingCentral **nextiva** **VONAGE**

Ooma

STERLING
COMMUNICATIONS

Microsoft Teams for Phones

GoTo Connect

zoomphone

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Virtual Receptionists

	Pricing	Hrs	Live receptionist	Call routing	Appt scheduling	Voicemail box	Call overflow	Outbound calls	Free local/toll-free #	Client intake	Integrations	Bilingual	Chat Plans
Back Office <i>Betties</i>	\$349-\$1,799/mo 100-unlimited min	5am-5pm PT Mon-Fri	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
LEX <i>Reception</i>	\$325-\$595/mo 150-500 min	24/7	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
PAT <i>Live</i>	\$59-\$1,279/mo 75-1000 min	24/7	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ruby	\$219-\$1,499/mo 50-500 min	24/7	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
smith VIRTUAL RECEPTIONISTS & LIVE WEBSITE CHAT	\$240-\$900/mo 30-150 calls	24/7	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

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Scheduling

- Ease of use for clients and users
- Features: 1:1 vs. multiple, polling vs. booking
- Integrations: Outlook, Google, Zoom, Teams, Slack, etc.



FindTime

Doodle



CalendarHero



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Client Relationship Management



- Intake and communication focus
- Moves leads through intake funnel

Legal:



General:



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Texting

- Built-in to other software
- SMS vs. Instant Message

Legal: **CORVUM**

General: **RingCentral** Google Voice

8x8



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Client Portals

- Practice management software
 - Clio, MyCase, PracticePanther, Smokeball
- Standalone software

CRM:  Lawmatics

Separate Portal: TitanFile  **fidu**

 CLIENTBRIDGE



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E-Signature

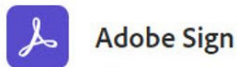
- Sending for signature method
- Capturing signature data
- Other features

Standalone:



DocuSign

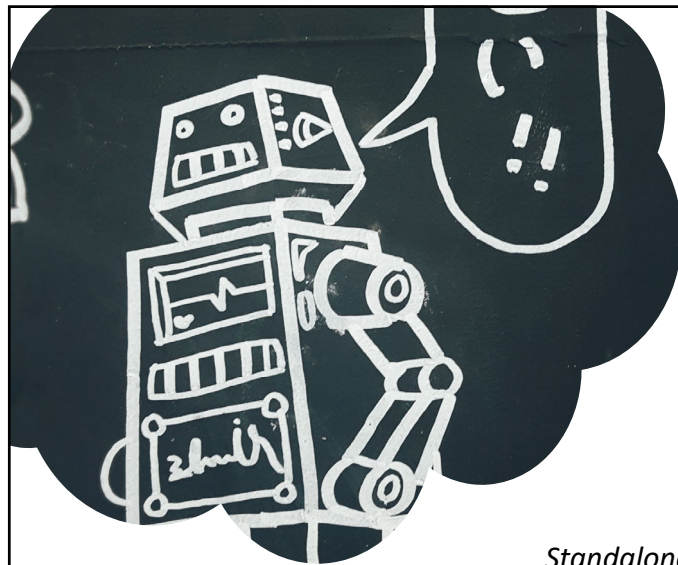
PDF-Related:



eSign



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ChatBots

- Integration for website option
- AI technology generates logic for set responses

Standalone:

chatfuel

TARS


Add-on:

smith HubSpot

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Remote Hearings

Webcam quality and tricks

Cancel background noise

Logi Tune Desktop






Windows 10 and up
macOS 11 and up

krisp

The complex block features a close-up image of a Logitech webcam at the top. Below the image, the text 'Remote Hearings' is displayed in a large, bold, black font. To the right of this text are four rounded rectangular boxes. The top two boxes contain the text 'Webcam quality and tricks' and 'Cancel background noise'. The bottom two boxes contain the text 'Logi Tune Desktop' and 'Windows 10 and up' followed by 'macOS 11 and up' on a new line, and the 'krisp' logo.

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Video Conferencing

	Pricing	Free Version	Desktop/mobile	Recording	Screen sharing	Meeting duration	Capacity	Whiteboard
 zoom	\$17/mo.	✓	Both	✓	✓	No Limit	300	✓
 webex <small>by CISCO</small>	\$25/mo.	✓	Both	✓	✓	24 Hrs	200	✓
 lifesize	\$15/mo.		Both	✓	✓	No Limit	300	✓
 Legaler	\$19/mo.	✓	Browser	✓	✓	No Limit	No Limit	✓
 FreeConference.com <small>by Iotum</small>	\$10/mo.	✓	Both	✓	✓	100	15	✓

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Remote E-Filing

- Optimal Character Recognition (OCR)
- Redaction
 - Advanced search features
- Exhibits
 - Bookmarks and internal links

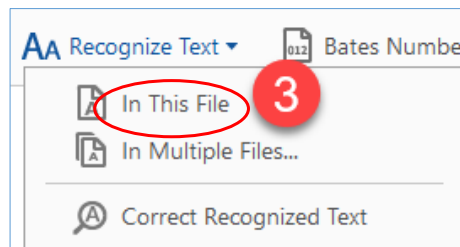
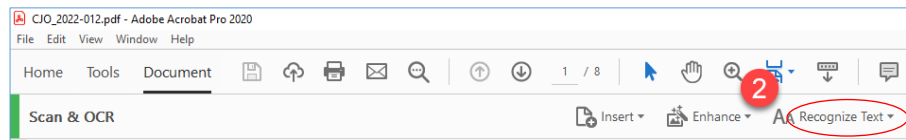
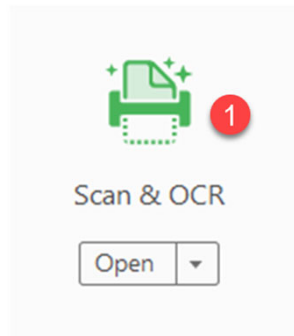
KOFAX



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Optimal Character Recognition (OCR) in Adobe Acrobat

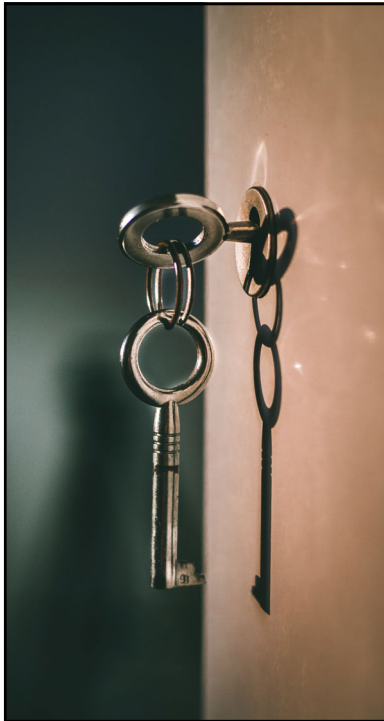
1. Go to the Tools menu and select Scan & OCR.
2. Click on it to access the menu. Click "Recognize text."
3. Click on "In This File."
4. A new menu will appear, click "Recognize text."



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Password Protection

- Maintains passwords in an electronic vault
- Adds protection for employee systems

Standalone:  1Password  DASHLANE
 LogMeOnce  LastPass... StickyPassword

Add-on:  McAfee |  True Key  NordPass

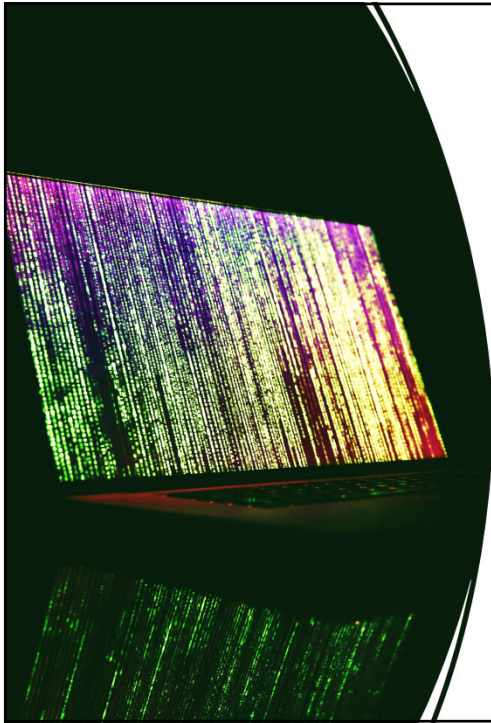
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Multifactor Authentication

- Authentication by:
 - Something you know
 - Something you have
 - Something you are
- Free Microsoft Authenticator



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Email Encryption

- Risks of sending unencrypted emails
- Email add-on for encryption
 - SecureGmail or DigitalID
- Signal (encrypted texting)



Citrix ShareFile

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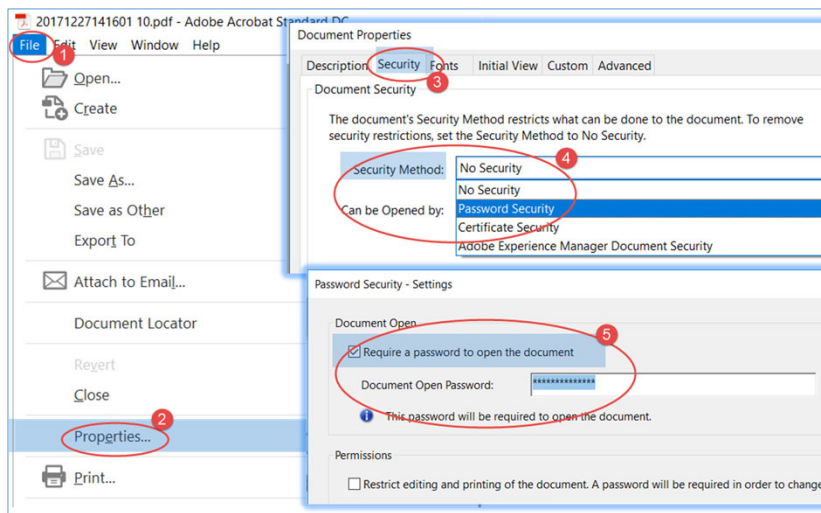
Securing Documents



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Encrypt PDF in Adobe Acrobat

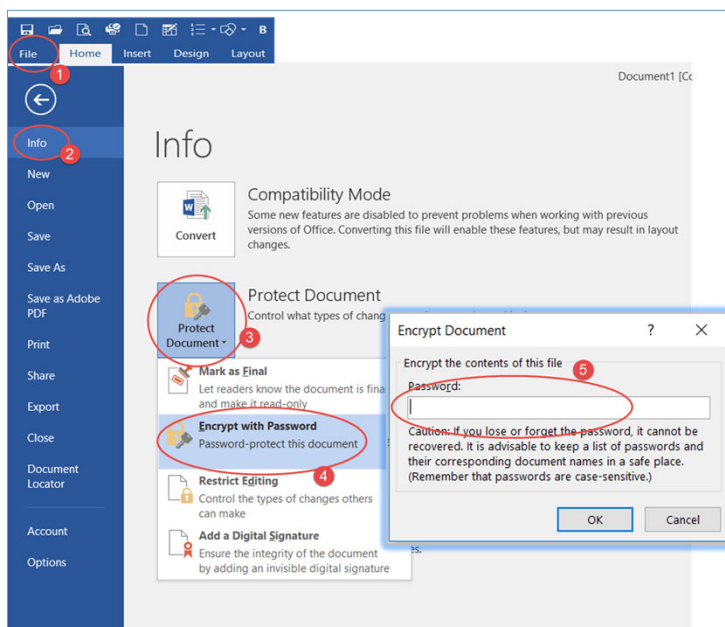
1. Click on File > Properties.
2. Find and click on the "Security" tab.
3. Under Security Method, select Password Security.
4. Check Require a password to open the document.
5. Enter a strong password.
6. Click OK.



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Encrypt MS Word

1. Click on File > Info > Protect Document.
2. Select Encrypt with Password.
3. Enter a strong password.
4. Click OK.



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Encrypt Before Uploading

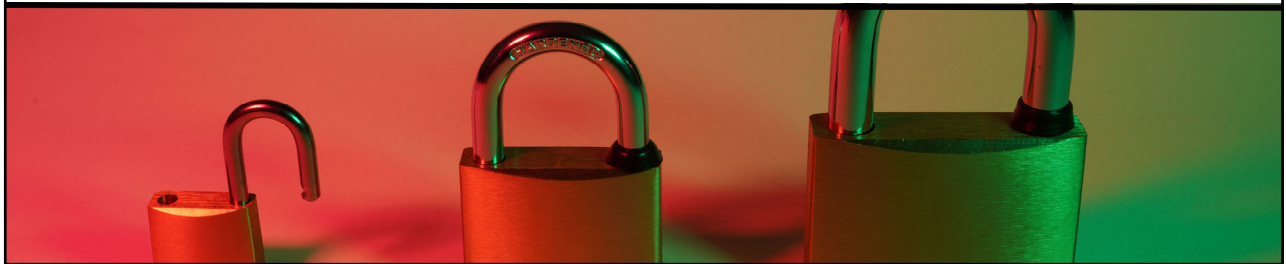
Free
Encryption:



Cryptomator



Encrypted cloud
storage:



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Internet Security

- Virtual Private Network (VPN)
- Best for public spaces or at-home use
- Creates virtual tunnel for information to pass through



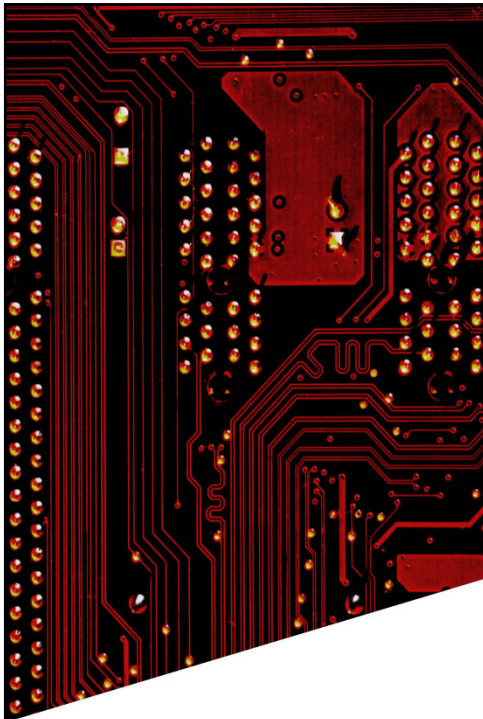
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Encrypt Wireless Internet

- Wi-Fi protected access 2/3
- Secure and Protected Wi-Fi
- "Wireless" or "Security" menu on router
- WPA2-PSK AES/WPA3 certified products




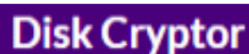
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Full Disk Encryption

- Data unreadable without decryption key
- Prevents unauthorized access when computer is lost or stolen

 VeraCrypt for Windows

 Disk Cryptor

 COMODO

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Windows

Bitlocker

- Built-in full-disk encryption
- Only available in Windows 8, 10 Pro or Enterprise version



Mac OS

FileVault 2

- Built-in full-disk encryption
- Only available in OS X Lion or later

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File and Task Management

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Types of Practice Management Software

Front Office	All-In-One	Practice-Area Specific
Need to combine with accounting software	Built-in accounting	Built for particular practice areas

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Practice Management Software

	Pricing	Case/matter mgmt.	Document mgmt.	Document assembly	Workflow mgmt.	Trust accounting	Full accounting	Online payments	Billing & Invoicing	Client portal
 Clio	\$99/user/mo	✓	✓	✓	✓	✓		✓	✓	✓
 CosmoLex	\$85/user/mo	✓	✓	✓	✓	✓	✓	✓	✓	✓
 MyCase	\$79/user/mo	✓	✓	✓	✓	✓	✓	✓	✓	✓
 PRACTICEPANTHER	\$79/user/mo	✓	✓	✓	✓	✓		✓	✓	✓
 rocket matter	\$59/user/mo	✓	✓	✓	✓	✓		✓	✓	✓

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How to Choose

- Needs assessment
- Strategic technology planning
- Research the products
- Evaluate

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Electronic File Storage

- On-premise
 - Hard drive
 - Server
- Cloud
 - Practice management software
 - Private cloud
 - Document storage app
 - Document management app



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Electronic File Storage

Private Cloud

PROCIRRUS™
cloud technologies

Uptime
Practice

Document Storage

Dropbox

box

OneDrive

Document Management

nd
netdocuments

Worldox

citrix | ShareFile

m iManage

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It is never a good time to lose your data. Back it up.

DEVICES

- External hard drive
- External solid state drive
- Network attached storage
- Backup server

SOFTWARE

- Windows Backup
- MAC TimeMachine
- Acronis True Image
- AOMEI Backupper
- EaseUS Todo Backup
- Cloud backup service (Backblaze, Carbonite, iDrive, SpiderOak)

DEVICES W/SOFTWARE

- Seagate Backup Plus drive
- Western Digital My Passport portable drive
- Samsung T5 SSD

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eDiscovery Software

- Manage, organize, and analyze electronically stored information (ESI)
- Common features include:
 - Data organization
 - Optical character recognition
 - Redaction, bates stamping
 - Production log
 - Story building
 - Audio and video transcription

OpenText Axcelerate



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Notetaking

- Often need more than just pen to paper
- Videoconferences involve multiple types of data (e.g., audio, chat, screen-sharing)



Otter.ai



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Voice Recognition

Dictation, device control, and more



- Automatically transcribe speech into text
- Edit and format documents
- Control computer's programs and web browsers



- Dictation
- Fewer features

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Transcribing notes in MS Word

1. Click on the drop-down arrow next to Dictate.
2. Click on Transcribe.
3. Upload audio or start recording.
4. Click the pencil icon to edit.

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To-Do Lists vs. Project Management

- Need more than a checklist
- Add context and subtasks to the list
- Collaborate, assign tasks

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Project Management Software

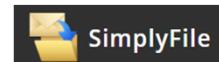
	Pricing	Install.	Collaboration	Recurring tasks	Create subtasks	Reminders	File sharing
 asana	\$10.99/mo	Cloud	✓	✓	✓	✓	✓
 Microsoft Teams	Free	Cloud	✓	✓	✓	✓	✓
 Basecamp	\$99/mo	Cloud	✓	✓	✓	✓	✓
 Zoho Projects	\$5/user/mo	Cloud	✓	✓	✓	✓	✓
 Notion	\$8/user/mo	Cloud and Desktop	✓	✓	✓	✓	✓

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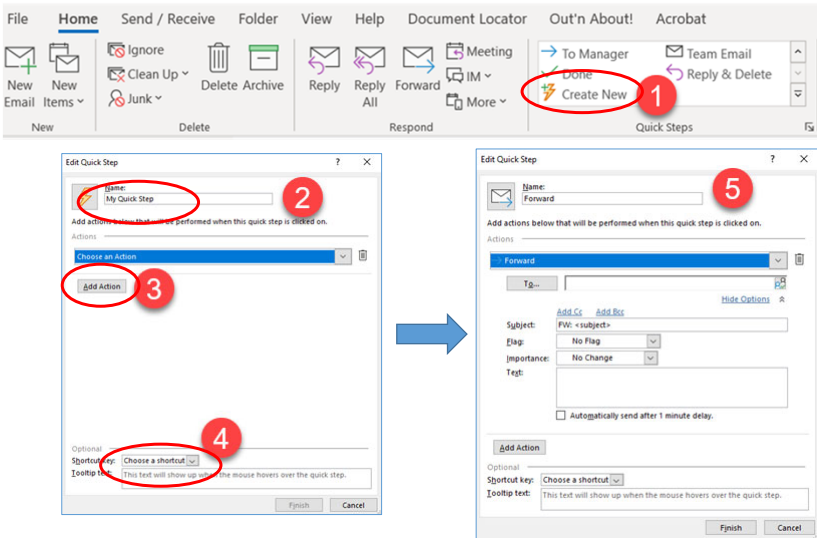
Overwhelmed by Emails?

- Save to practice management software
- Create folders & automatic rules
- Consider using email plug-ins



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Outlook Quick Steps Workflows

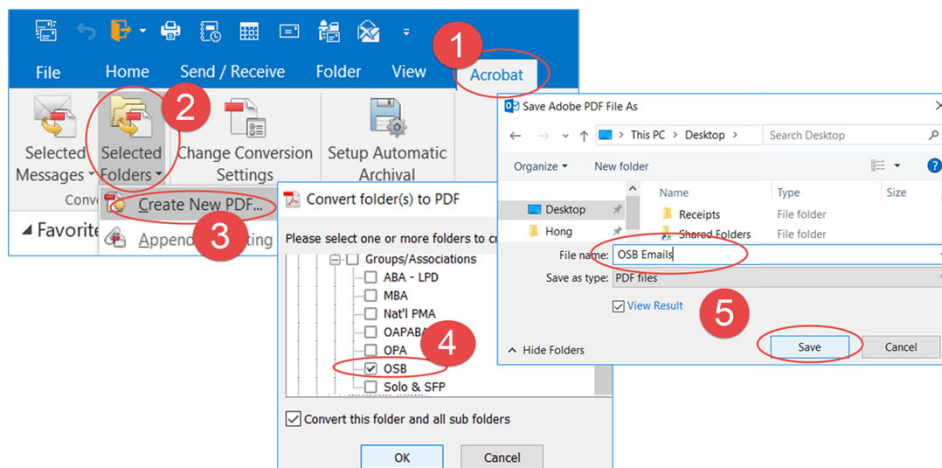


1. Click on Create New in the Quick Steps gallery.
2. Give your Quick Step a concise name.
3. Select the first action in the workflow, then click on the box to add additional actions.
4. Consider adding a shortcut key.
5. Workflow examples include delegating emails (first action is to forward, then mark as read, then move the email to a particular folder).

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Save Emails as One PDF

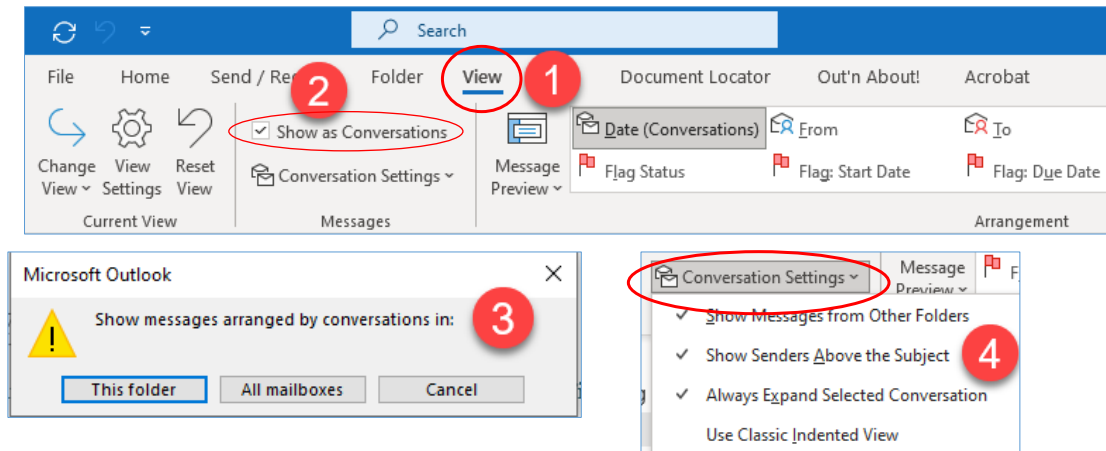
1. Click on Adobe tab.
2. Click Selected Folders.
3. Select Create New PDF.
4. Choose folder to save.
5. Rename file and click Save.



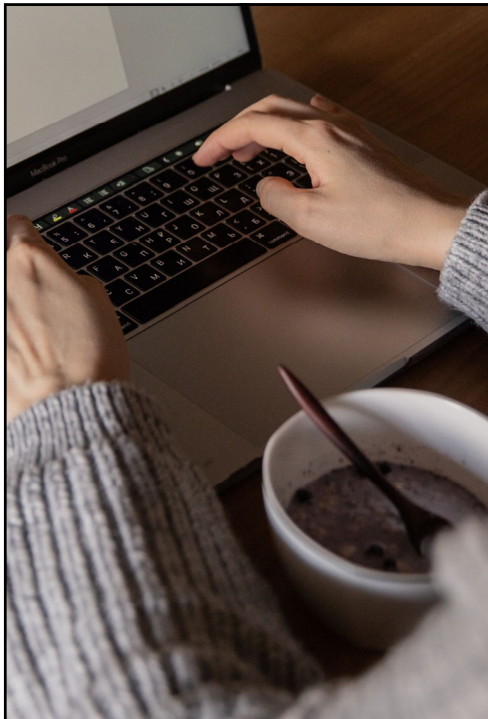
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Create Conversations in Outlook

1. Select View.
2. Click on Show as Conversations.
3. Select This folder or All mailboxes.
4. From any folder, select View > Conversation Settings.



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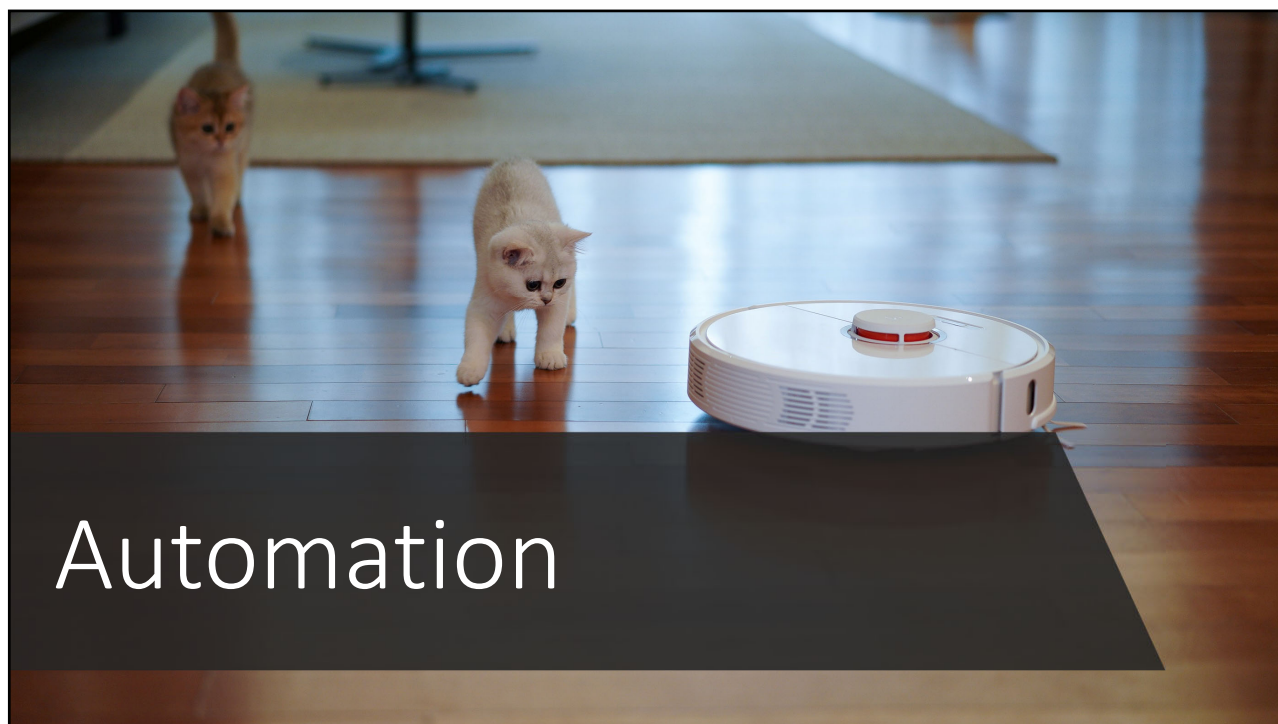


Technology Training

procertas®  Affinity
CONSULTING

 in LEARNING  LTC4™

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Document Assembly

Robotic document drafting:
Automatically fills in correct data



- Save time
- Reduce errors
- Boost productivity

 **documate**

HOTdocs™

 **TheFormTool**

Knackly

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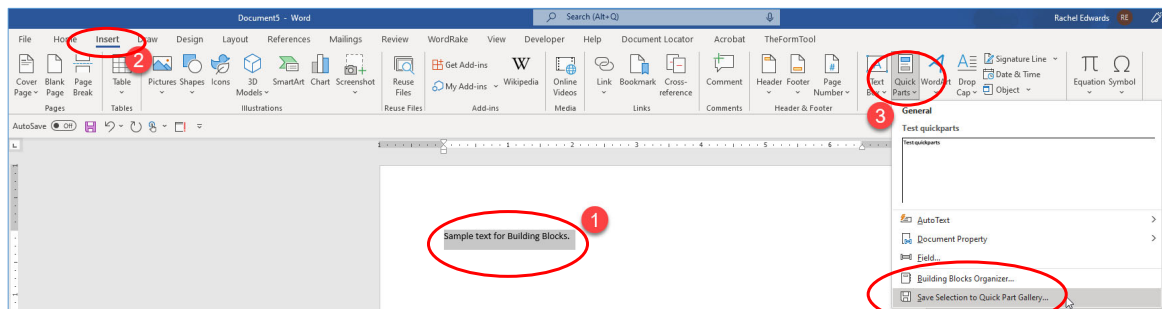


Microsoft Word Built-In

- Quick Parts Building Blocks
- Quick Parts Fields

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MS Word Quick Parts Building Blocks



1. Select text.
2. Select Insert tab.
3. Under Text section, click Quick Parts and choose 'Save select to Quick Part gallery.' Name and choose where to save.
4. To insert later, go to Insert tab, select Quick Parts, then select Building Blocks Organizer.
5. Locate building block, highlight, and place cursor in document where you would like to place, then select insert.

Create New Building Block

Name:

Gallery:

Category:

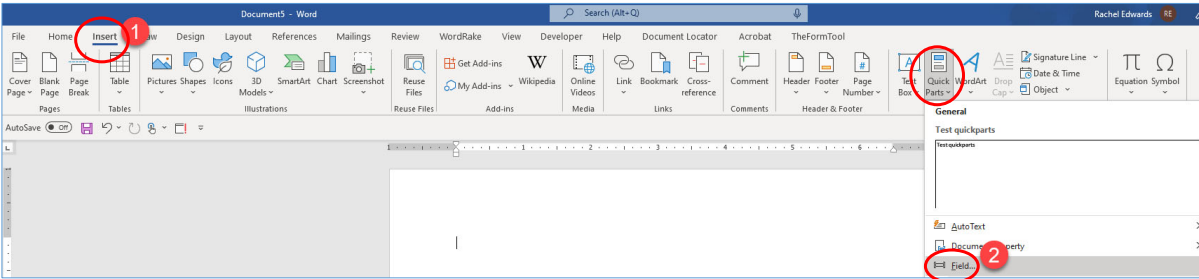
Description:

Save in:

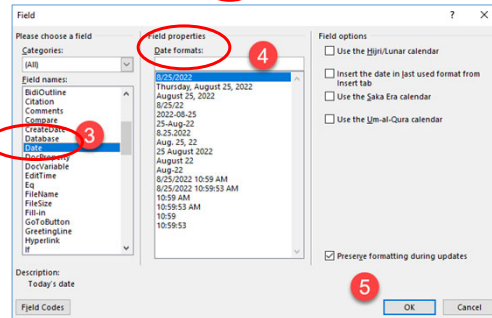
Options:

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MS Word Quick Parts Fields



1. To insert a Date field, go to the Insert tab.
2. In the text group, click Quick Parts and select Field.
3. Select Date from the list.
4. Select the desired date format.
5. Click OK.



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Adobe Acrobat Pro: Custom Commands

1. Find Action Wizard > Click New Custom Command.

2. Click Command you want to customize from left menu. Check Don't show options, then click Command Options.

3. Customize the command.

4. Save Settings and name it.

5. Click OK until complete.

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Getting Paid: Timekeeping, Billing, and Accounting

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Timekeeping and Billing

- Practice management software
- Standalone
- Integrations

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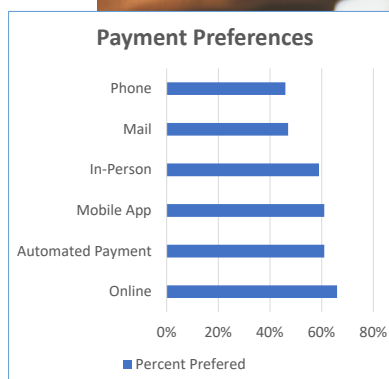
Time & Billing

	Pricing	Install.	Time tracking	Invoicing	Expense tracking	Online payment	Recurring payment	Reporting	Client portal	Project mgmt	Integrations
 bill4time	\$27-\$80/mo	Cloud	✓	✓	✓	✓	✓	✓	✓	✓	✓
 Tabs3	\$40/mo, or \$1850 1-time license	DeskT	✓	✓	✓	✓	✓	✓	✓	✓	✓
 sage Timeslips	\$47-\$132/mo	DeskT	✓	✓	✓	(✓)	✓				✓
 TIME SOLV	\$35.95-\$39.95/mo *depends on # users	Cloud	✓	✓	✓	✓	✓	✓	✓	✓	✓
 TIME59	\$199 entire firm	Cloud	✓	✓	✓	(✓)	✓	✓	✓		

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Payment Processors

- Client payment preferences
- Trust accounting compliance
- Practice management software trends



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Payment Processors

	Inst.	Integration	Accept payments	Payment <i>via</i> website	Recurring payment	Accepts major CC	eChecks/ACH	Issue refunds	Trust account compliance
 HEADNOTE	Web	No	✓	✓	✓	✓	✓	✓	✓
 LAWPAY	Web	Yes (numerous)	✓	✓	✓	✓	✓	✓	✓
 lexcharge	Web	RocketMatter	✓	✓	✓	✓	✓	✓	✓
Clio Payments	Web	Clio	✓	✓	✓	✓	✓	✓	✓
 Square	Web	Yes	✓	✓	✓	✓	✓		

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Accounting Software

- Double-entry bookkeeping
- Banking
- Bank reconciliation
- Financial statements



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Accounting Software

	Pricing	Install	Double-entry bookkeeping	Connect to bank acct.	Billing / Invoicing	Online Payments	Expense Tracking	Bank Reconciliation	Reporting / Analytics	Integrations
 Zoho Books	\$0-\$240/mo	Cloud	✓	✓	✓	✓	✓	✓	✓	✓
 Intuit QuickBooks	\$30-\$200/mo	Cloud	✓	✓	✓	✓	✓	✓	✓	✓
 Quicken	\$9.99/mo	Cloud		✓	✓	✓	✓	✓	✓	
 FreshBooks	\$15-\$50/mo	Cloud	✓	✓	✓	✓	✓	✓	✓	✓
 Xero	\$12-\$65/mo	Cloud	✓	✓	✓	✓	✓	✓	✓	✓

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Cyberattacks and Scams

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Cyberattacks 2.0

- Business email compromise vs. potential client
- Lax approach to security while working remotely
- Sharing and reusing credentials



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Red Flags

PC

1. PC is not from around your area
2. Easy money for little work
3. Matter is resolved quickly
4. Demand prompt refund or payment
5. Lag time between incident and you

Non-PC

1. Message appears to come from management, coworker, or vendor
2. Pretends to share a mutual interest
3. References recent travel or conference
4. Heightened sense of urgency
5. Asks to bypass company's security policy
6. Request doesn't make sense

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Working Remotely

- Use law firm devices on the home network rather than taking control of a home machine
- Remotely patch devices to make sure updates installed
- Use firewalls and anti-spyware



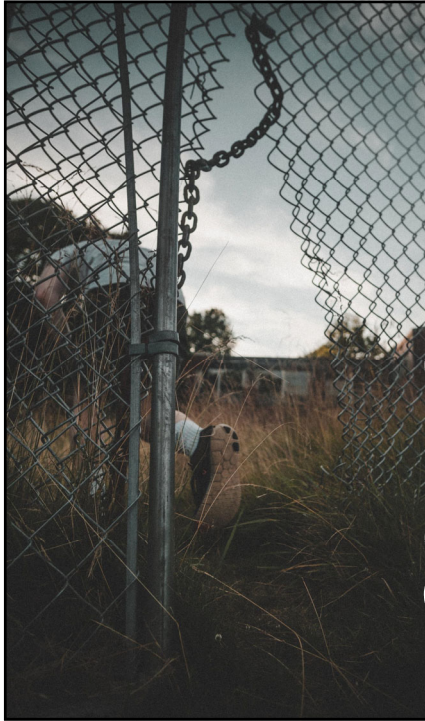
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Steps to Lower Cyber Risk

- Inactivity timers
- Change security and privacy settings
- Enable features to control access
- Disable or limit screen and file sharing to trusted source

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Endpoint Detection and Response Software

- Uses AI to combat ransomware and other more sophisticated types of attacks
- Focuses on detecting advanced threats that your traditional antivirus software has missed



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Wipe Devices Remotely

iPhone

1. Go to Settings.
2. Enter your Apple ID and tap Find My iPhone.
3. Toggle to the On position.
4. To wipe the device remotely, go to [iCloud.com/find](https://icloud.com/find), choose your device, then select Erase.

Android

1. Go to the Settings of your Android phone.
2. Find the settings for Personal. Click Google.
3. Then go to Services and click on Security.
4. Then go to Android Device Manager and switch on "Remotely locate this device" and "Allow remote lock and erase."
5. To wipe the device remotely, open your phone's settings, find Personal.
6. Find Location. Click On and sign in with your Google account. Once you find the phone you click on "Set up Lock & Erase."







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Cybersecurity Training

- Need regular cybersecurity training for employees
- At least 1-2 times per year
- Utilize a company specializing in cybersecurity



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		<h2>Cybersecurity Awareness Training</h2> <hr/>
		
		

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PLF Resources

www.osbplf.org > Services

OSB Login / Non-Member Login

OSB Professional Liability Fund

SEARCH

SERVICES ^ CLAIMS v COVERAGE v EXCESS v ABOUT v FOR THE PUBLIC v

WE ARE THE LAWYERS' PROFESSION

Helping each lawyer when they need it, for the good of the profession.

- HOW WE HELP LAWYERS
- CLERICAL & RESOURCES
- CALENDAR OF EVENTS
- PRACTICE MANAGEMENT ASSISTANCE
- PERSONAL ASSISTANCE
- DISCOUNTS
- BLOGS

- LAWYER SERVICES**
Our Practice Management Attorneys and Attorney Counselors provide confidential services to all Oregon lawyers.
- MALPRACTICE CLAIMS**
PLF Claims Attorneys investigate, evaluate, and administer malpractice claims involving Oregon lawyers.
- PRIMARY COVERAGE**
Learn more about the malpractice coverage provided to Oregon lawyers.
- EXCESS & CYBER**
Make sure your law practice is covered fully and responsibly with PLF Excess & Cyber Coverage.

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PLF Blog *inPractice* Practical Advice for Oregon Lawyers

at:

<https://www.osbplf.org/blog/>

THRIVING TODAY *inPractice*
Practical Advice for Oregon Lawyers

22 AUG 2022

USING VIDEO TO SUPPORT INTERNAL OFFICE PROCESSES

If a picture is worth a thousand words, a one-minute video equals 1.8 million words. This article will discuss three ways to use video to run a better practice, reduce potential malpractice, and improve your bottom line. It will conclude with a step-by-step tutorial on how to make videos for your staff in Microsoft Teams (included free in the Microsoft Office 365 Suite).

Categories: Communication, COVID-19, Marketing, Office Systems, Technology Video

Tutorial / *inPractice* / by Isaac Alley

18 JUL 2022

THE PLF WELCOMES NEW BOARD MEMBER

The PLF is pleased to announce that Valerie Sahn has been appointed as a new board member effective June 24, 2022.

PLF News / by PLF News

15 JUL 2022

DRAWING THE LINE FOR NONENGAGEMENT

Meeting with a potential client may sometimes feel like walking a tightrope. It can be difficult to end the intake without any misunderstandings or unintended promises. When someone believes an attorney-client relationship has formed but you do not, a real danger exists. As the attorney, it is your role and responsibility to clearly communicate when an attorney-client relationship is established and when it is not, no matter the marketing medium.

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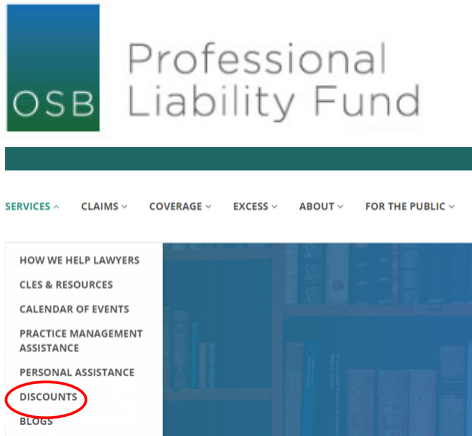
Authors

- Hong Dao
- Rachel Edwards
- Douglas S. Querlin
- Kyra Hazilla
- Bryan R. Welch
- Monica Logan
- View All Authors »

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PLF Resources

www.osbplf.org > Services > Discounts



Virtual Receptionist

- Ruby

Practice Management Software

- Clio
- CosmoLex
- MyCase
- PracticePanther
- RocketMatter

Billing & Timekeeping

- TimeSolv

Conflict Checking Software

- Client Conflict Check

Editing for Legal Profession

- WordRake

Email Encryption

- Trustifi

Business Productivity

- TitanFile
- PDF Fusion
- Perfect Authority
- WordPerfect X9

Marketing

- LawLytics

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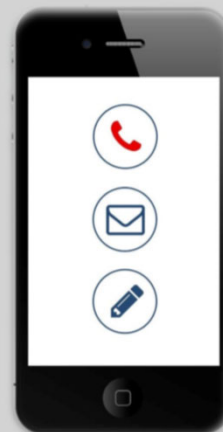
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Isaac Alley

Isaac@osbplf.org

503-924-4171

Free and confidential



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The following written materials can be found on the PLF's website at <https://www.osbplf.org/>.

1. Office Systems

- a. CLE: Working From Home: Basic Setup Tools & Resources (<https://osbplf.org/cle-classes/working-from-home--basic-setup-tools-resources/>)
- b. Blog: Working From Home: Make Your Internet Work For You (<https://www.osbplf.org/blog/inpractice/working-from-home-make-your-internet-work-for-you/>)
- c. Practice Aid: Home-Based Law Office (https://assets.osbplf.org/forms/practice_forms/Home-Based%20Law%20Office.pdf)
- d. Practice Aid: Online Data Storage Providers (https://assets.osbplf.org/forms/practice_forms/Online%20Data%20Storage%20Providers.pdf)
- e. Blog: Phone Systems: What Works for Your Firm? (<https://osbplf.org/blog/inpractice/phone-systems--what-works-for-your-firm/>)
- f. Blog: If You Build It They Will Come: Make It Easier For Potential Clients To Contact You (<https://osbplf.org/blog/inpractice/if-you-build-it-they-will-come--make-it-easier-for-potential-clients-to-contact-you/>)
- g. Blog: Client Intake: Making it More Effective and Efficient (<https://osbplf.org/blog/inpractice/client-intake--making-it-more-effective-and-efficient/>)
- h. Blog: Send Text Messages to Your Clients Without Using Your Cell Phone (<https://www.osbplf.org/blog/inpractice/send-text-messages-to-your-clients-without-using-your-cell-phone/>)
- i. Blog: Client Portals: Take Control of Client Communication (<https://www.osbplf.org/inpractice/client-portals--take-control-of-client-communication/>)
- j. Blog: Electronic Signature: A Tool to Incorporate in Your Law Practice (<https://www.osbplf.org/inpractice/electronic-signature--a-tool-to-incorporate-in-your-law-practice/>)
- k. Blog: Resources for Improving Your Remote Court Hearing Experience (<https://osbplf.org/blog/inpractice/resources-for-improving-your-remote-court-hearing-experience/>)

2. Task Management and Timekeeping/Billing

- a. CLE: Practice Management Software: Know What You Want Before Making the Switch (<https://osbplf.org/cle-classes/practice-management-software--know-what-you-want-before/>)

- b. Blog: Saving Text Messages (<https://www.osbplf.org/inpractice/saving-text-messages/>)
- c. Blog: Notetaking Outside the Office (<https://osbplf.org/blog/inpractice/notetaking-outside-the-office/>)
- d. CLE: More Than Just a Click: Automating the Client Intake Process (<https://osbplf.org/cle-classes/more-than-just-a-click--automating-the-client-intake-pr/>)
- e. CLE: Document Automation: Don't Be Afraid of the Robots (<https://osbplf.org/cle-classes/document-automation--dont-be-afraid-of-the-robots/>)
- f. CLE: PDFing for Success: Adobe Acrobat Pro Updates (<https://osbplf.org/cle-classes/pdfing-for-success--adobe-acrobat-pro-updates/>)
- g. Blog: Billing Software: Explore Your Options (<https://osbplf.org/blog/inpractice/billing-software--explore-your-options/>)
- h. Blog: Electronic Payment Processing Software for Law Firms (<https://osbplf.org/blog/inpractice/electronic-payment-processing-software-for-law-firms/>)

3. Data Protection

- a. Bulletin Article: Ethics of Electronic Files (https://assets.osbplf.org/forms/practice_forms/Floating%20in%20the%20Cloud%20-%20May%202017%20Bulletin.pdf)
- b. Blog: Remote Access For Lawyers: Remote Desktop Protocol (RDP) And Virtual Private Network (VPN) (<https://osbplf.org/blog/inpractice/remote-access-for-lawyers--remote-desktop-protocol-rdp-and-virtual-private-network-vpn/>)
- c. Blog: Tommy and the Secure Tunnel: Virtual Private Networks (<https://www.osbplf.org/blog/inpractice/tommy-and-the-secure-tunnel--virtual-private-networks/>)
- d. InBrief: Protect Your Data By Using Encryption (https://assets.osbplf.org/in_briefs_issues/Protect%20Your%20Data%20by%20Using%20Encryption.pdf)
- e. Blog: Understanding Security When Using Cloud Storage (<https://www.osbplf.org/inpractice/understanding-security-when-using-cloud-storage/>)
- f. Practice Aid: Protecting Yourself & Your Law Firm from Data Breach Checklist (https://assets.osbplf.org/forms/practice_forms/Protecting%20Yourself%20and%20Your%20Law%20Firm%20from%20Data%20Breach%20Checklist.pdf)
- g. Practice Aid: How to Backup your Computer (<https://www.osbplf.org/assets/forms/pdfs//How%20to%20Back%20Up%20Your%20Computer.pdf>)

- h. Practice Aid: Removing Metadata (https://assets.osbplf.org/forms/practice_forms/Removing%20Metadata.pdf)
- i. Practice Aid: Online Data Storage Providers (https://assets.osbplf.org/forms/practice_forms/Online%20Data%20Storage%20Providers.pdf)

4. Cybersecurity

- a. Practice Aid: Information Security Checklist (https://assets.osbplf.org/forms/practice_forms/Information%20Security%20Checklist%20for%20Small%20Businesses.pdf)
- b. Blog: Evolving Scams: Don't Let Your Guard Down (<https://osbplf.org/blog/inpractice/evolving-scams--dont-let-your-guard-down/>)
- c. Blog: Don't Fall Prey to Spear Phishing (<https://osbplf.org/blog/inpractice/dont-fall-prey-to-spear-phishing/>)
- d. InBrief: Cybersecurity and Employee Training (https://assets.osbplf.org/in_briefs_issues/Cybersecurity%20and%20Employee%20Training.pdf)
- e. InBrief: Unwanted Data: How to Properly Destroy Data in Hardware (https://www.osbplf.org/assets/in_briefs_issues/Unwanted%20Data%20How%20to%20Properly%20Destroy%20Data%20in%20Hardware.pdf)
- f. Practice Aid: Preventing Data Breach (https://assets.osbplf.org/forms/practice_forms/Protecting%20Yourself%20and%20Your%20Law%20Firm%20from%20Data%20Breach%20Checklist.pdf)
- g. Practice Aid: What to Do After a Data Breach (<https://www.osbplf.org/assets/forms/pdfs/What%20to%20Do%20After%20a%20Data%20Breach%20-%20April%202016%20In%20Brief.pdf>)

5. Outlook Quick Steps Workflows

- a. <https://www.attorneyatwork.com/process-email-faster-with-outlook-quick-steps/>

6. Adobe Acrobat How-Tos

- a. How to combine multiple PDFs into one PDF
 - i. Open the Tools tab and select Combine files.
 - ii. Click Add Files and select the files you want to include in your PDF. You can merge PDFs or a mix of PDF documents and other files.
 - iii. Click, drag, and drop to reorder files or press Delete to remove any content you don't want.
 - iv. When you're finished arranging, click Combine Files.
 - v. Name your file and click the Save button.
- b. How to create internal links in PDFs

- i. Choose Tools, Edit PDF
 - ii. Select the Link down arrow in the Edit PDF toolbar.
 - iii. Select Add/Edit Web or Document Link from the drop-down menu.
 - iv. Your selection (arrow) cursor will turn into a crosshair-style cursor.
 - v. Left-click and hold as you use the cursor to drag a rectangle around the text you want to turn into an internal link.
 - vi. Select Invisible Rectangle or Visible Rectangle from the Link Type drop-down menu in the Create Link dialog box.
 - vii. Select Go to a page view in the Link Action section. Select the next button.
 - viii. The Create Go to View dialog box will appear. Scroll to the part of the document you want to link to. The Create Go to View dialog box will remain on the screen while you scroll.
 - ix. Select the Set Link button in the Create Go to View dialog box when the part of the document you want to link to is visible on your screen.
 - x. After you select the Set Link button, Acrobat will return to the text you linked to.
 - xi. Click the link to ensure it takes you to the correct location in your document.
- c. How to create a bookmark
- i. Right click on the page you want to bookmark.
 - ii. Select Add Bookmark from the pop-up menu.
 - iii. Enter a label for your new bookmark in the text box labeled Untitled in the Bookmarks panel.