

Leveraging Law Office Technology

April 7, 2021

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ICLEF Electronic Publications

Feature Release 4.1
August 2020

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Feature list:

1. **Searchable** – All ICLEF Electronic Publications are word searchable. To begin your search, click on the “spyglass” icon at the top of the page while using the Adobe® software.
1. **Bookmarks** – Once the publication is opened using the Adobe Acrobat® software a list of bookmarks will be found in a column located on the left side of the page. Click on a bookmark to advance to that place in the document.
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3. **Book Index** – We are adding an INDEX at the beginning of each of our publications. The INDEX provides “jump links” to the portion of the publication you wish to review. Simply left click on a topic / listing within the INDEX page(s) to go to that topic within the materials. To return to the INDEX page either select the “INDEX” bookmark from the top left column or right-click with the mouse within the publication and select the words “*Previous View*” to return to the spot within the INDEX page where you began your search.

Please feel free to contact ICLEF with additional suggestions on ways we may further improve our electronic publications. Thank you.

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LEVERAGING LAW OFFICE TECHNOLOGY: GETTING THE MOST OUT OF THE SOFTWARE EVERY LAWYER SHOULD ALREADY OWN

April 7, 2021

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DISCLAIMER

The information and procedures set forth in this practice manual are subject to constant change and therefore should serve only as a foundation for further investigation and study of the current law and procedures related to the subject matter covered herein. Further, the forms contained within this manual are samples only and were designed for use in a particular situation involving parties which had certain needs which these documents met. All information, procedures and forms contained herein should be very carefully reviewed and should serve only as a guide for use in specific situations.

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LEVERAGING LAW OFFICE TECHNOLOGY



Agenda

- 9:00 A.M. **60 Tips, Tricks, Apps & Websites in 60-minutes**
This session covers all the latest developments in legal technology. We will cover where to go for legal-specific tech help, gadgets, and utilities that will help you work from home more efficiently, communicate with your clients better and improve the services you render, tablet and cloud-computing tips, ways you can securely share documents with clients and opposing counsel securely, law practice & life hacks, and more!
- 26-Week Action Plan for Time Management & Digital Detox in the Face of Covid-19**
Maintaining focus before COVID-19 was challenging enough. Now we must add in the stresses of working from home, managing social distancing, keeping our families safe, and keeping our practice afloat. Achieving focus during this time can be extremely challenging! This one-hour session will show you how to achieve laser focus and work-life balance in the face of this pandemic.
- The Best in Mobile Apps – Apps for the iPhone/iPad & Android Devices**
Apps for legal professionals are constantly changing. In this fast-paced session, we will cover the 60 greatest hits and latest hits that will maximize mobility from your iPhone, iPad, or Android mobile device!
- 12:15 P.M. **Lunch Break**
- 1:15 P.M. **PowerPoint Power Hour**
Based on Paul's ABA Book, *PowerPoint in an Hour for Lawyers*, in this session, you will learn how to design professional-looking and effective PowerPoint presentations, without the use of endless bullet points and too much text. Specifically, we will cover how to work with photos, documents, document call outs, videos, audio recordings, text boxes, timelines, and much more.
- A Lawyer's Guide to PDF Files (Acrobat or PowerPDF for Lawyers)**
Regardless of the PDF program you use, this session will show you the appropriate uses of PDFs. We will cover extremely important topics such as redaction, metadata removal and electronic document security, Bates Numbering, splitting/combining PDFs, reducing file-size for electronic case filing, review/comment, and PDF collaboration, adding signatures & stamps, routing PDFs for comments/feedback, and more. Finally, we will identify all the programs you can use for all of these functions (you are not limited to Adobe Acrobat or PowerPDF) and explain their relative pros and cons.
- Outlook Power Hour**
Lawyers and staff are generally drowning in email and many feel helpless when trying to get it under control. This session will show you how to use all of Microsoft Outlook's feature set to efficiently store, organize email (and attachments), and successfully deal with high email volume. This session also shows you how this powerful email and information manager helps better organize emails, contacts, calendar, and tasks. Tap into the latest and greatest features of Outlook.
- 4:30 P.M. **Program Adjourns**

April 7, 2021

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LEVERAGING LAW OFFICE TECHNOLOGY



Faculty

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April 7, 2021

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Paul J. Unger is a nationally recognized speaker, author and thought-leader in the legal technology industry. He is an attorney and founding principal of Affinity Consulting Group, a nationwide consulting company providing legal technology consulting, continuing legal education, and training.

He is the author of dozens legal technology manuals and publications, including recent published books, *Tame the Digital Chaos – A Lawyer's Guide to Distraction, Time, Task & Email Management* (2017) and *PowerPoint in an Hour for Lawyers* (2014). He served as Chair of the ABA Legal Technology Resource Center (2012-13, 2013-14) (www.lawtechnology.org/), Chair of ABA TECHSHOW (2011) (www.techshow.com), and served as Planning Chair for the 2016 ACLEA Mid-Year Conference in Savannah, GA. He is a member of the American Bar Association, Columbus Bar Association, Ohio State Bar Association, Ohio Association for Justice, and New York State Bar Association, and specializes in document and case management, paperless office strategies, trial presentation and litigation technology, and legal-specific software training and professional development for law firms and legal departments throughout the United States, Canada and Australia. Mr. Unger has provided trial presentation consultation for over 400 cases. In his spare time, he likes to run and restore historic homes.



ICLEF 60 Tips, Tricks, Apps & Websites

Paul J. Unger
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Twitter: @pauljunger

This slide features a dark blue header with the title 'ICLEF 60 Tips, Tricks, Apps & Websites' and a gear icon. The background is light gray with a collage of various technology-related icons. The author's name and contact information are centered at the bottom.



Extras / Downloads



www.pauljunger.com



This slide has a blue header with the text 'Extras / Downloads'. Below the header is a light gray background with a blue folder icon containing a downward arrow. The website URL 'www.pauljunger.com' is centered below the icon. The Affinity Consulting logo is in the bottom right corner.



MS Office & PDF Tips



This slide has a dark blue header with the text 'MS Office & PDF Tips'. The main content area is light gray and features the Microsoft Office logo (Word, Excel, Outlook, PowerPoint) and the Affinity Consulting logo in the bottom right corner.

Microsoft ToDo



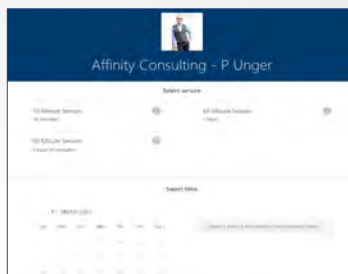
FindTime by Microsoft

Vote on your preferred times



Bookings by Microsoft

Allows Client to Book Appointment Directly on your Calendar



Outlook Tip

Add Attachments to Appointments & Tasks

The screenshot shows the Outlook 'Appointment' ribbon with the 'Attachments' icon highlighted by a red arrow. The 'Appointment Details' pane on the right shows a meeting titled 'Dropbox Meeting - Record' with a 'Dropbox Meeting - Record' attachment listed below it.

Outlook Tip

Add Locations to Appointments & Tasks

The screenshot shows the Outlook 'Appointment' ribbon with the 'Location' field highlighted by a red arrow. The 'Appointment Details' pane on the right shows a meeting titled 'Charleston Area Medical Center' with the location 'CAMC - General Hospital, 501 Adams Street, Charleston WV 25301' listed below it.

My Templates

Place cursor > View Templates > Select desired Text to Insert

The screenshot shows the Outlook 'My Templates' pane on the right side of the interface. A red box highlights a specific template in the list, and a red arrow points to the 'View Templates' button in the ribbon.

Add to My Templates

View Templates >
Add Template >
Type or Paste Text





Text Expander

“Autotext” entries on an
iPhone/iPad (\$3.39/month)



Editing Video in PowerPoint

1. Right-Click on Video > Trim
2. Adjust Start and Stop Time







Create Slides from Dozens of Pics
(never insert one at a time again!)

- 1. Insert > Photo Album**
- 2. Select ALL desired Pics**
- 3. Re-order, Adjust, Create all at Once**



Invest in Training, Period!

PDF, Fill/Sign, Save, Email
55 Seconds



Invest in PDF Training!

Print, Sign, Scan, Save & Email
4 Min, 15 Sec



P

Random Tips



Zoom Tip

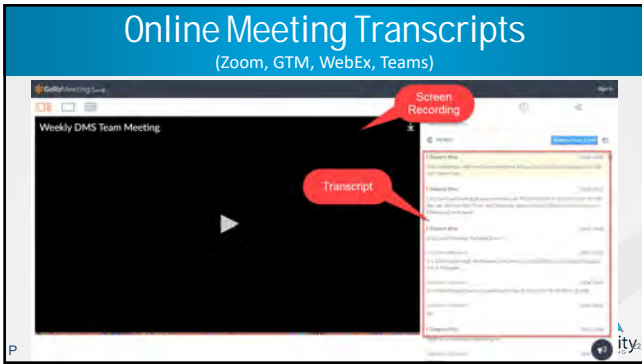
1. Place yourself on Mute
2. Press & hold Spacebar to talk



P

Online Meeting Transcripts

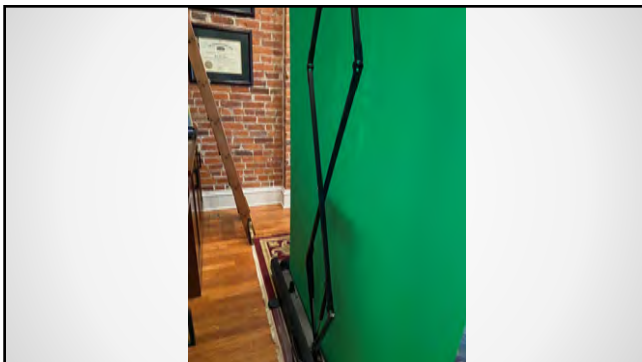
(Zoom, GTM, WebEx, Teams)



Quick Easy Green Screen

For Virtual Backgrounds – Minimize Halo



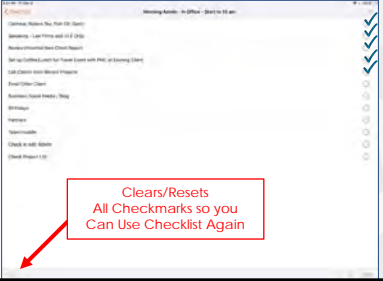


"Simple Checklist" App (iOS)


(great for morning routines, processes, etc.)

"Do Things, Again and Again"

By Michael Galloy
@simplechecklistapp



Clears/Resets All Checkmarks so you Can Use Checklist Again



Text Expander

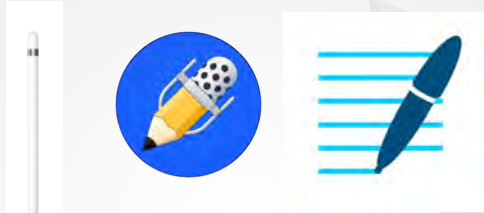
"Autotext" entries on an iPhone/iPad (\$3.39/month)






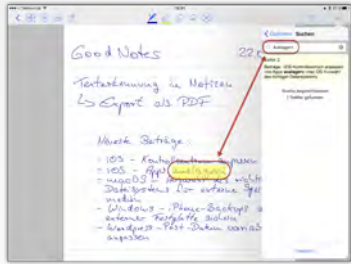
Apple Pencil + Notability, GoodNotes

Take Notes, Markup your CLE Materials, etc.





Apple Pencil + Notability or GoodNotes



No More Fat Wallets


- ▶ **Smartish Wallet Slayer**
- ▶ **\$14.99 on Amazon**
- ▶ **3 Credit Cards**
- ▶ **Cash**
- ▶ **Protective Grip**
- ▶ **Kickstand**



Screenpresso (\$29.99) (or Snagit)

Image and Video Screen Capture

Image and Video screen capture
Time saver for explaining something to your colleagues and clients



"A screenshot is worth a thousand words!"

Screenpresso captures your desktop screenshots and HD videos for your training documents, collaborative design work, IT help reports, and more...

Screenpresso is a NEW LIGHT-weight screenshot tool with built-in image editor, color picker generator and sharing options.

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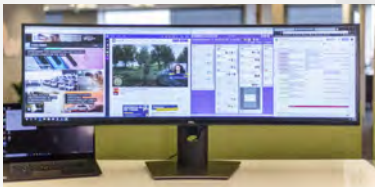
Best Dual Monitors For A Great Deal

- ▶ 2 of these - Sceptre 27" Curved 75Hz LED Monitor C275B-144RN - \$173 each
- ▶ ... on one of these – HUANUO dual monitor stand - \$30 (CDN \$50)



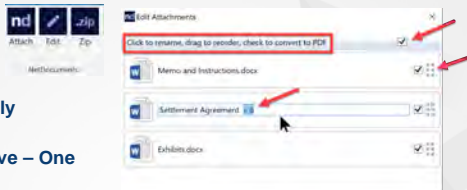
Compare Single, Large Curved Monitors

- ▶ Samsung Curved 49" - \$999.99
- ▶ Dell UltraSharp 49" Curved - \$1,499



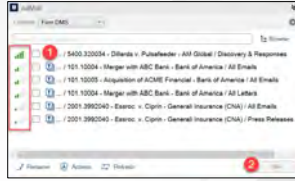
NetDocs Tip – Managing Email Attachments

- ▶ Rename
- ▶ Re-Order
- ▶ PDF on the Fly
- ▶ Send and Save – One Step



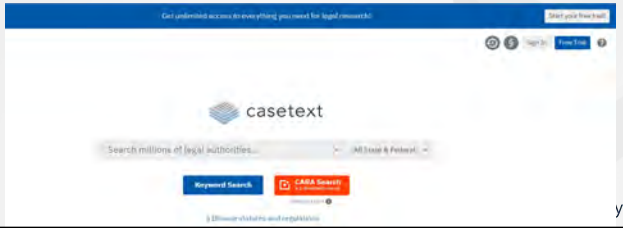
Useful AI – NetDocs Predictive Filing

- ▶ Easy Filing
- ▶ Everyone Knows it is Filed
- ▶ Case File is COMPLETE



<https://casetext.com/> - Cara A.I.

Upload your pleading and it will find relevant case law for you



Compose by CaseText



Portable Full HD Second Monitor

ASUS MB169B+ (USB 3) or MB 169C+ (USB-C) 15.6-Inch Screen - \$180



800g | 8.5mm



Portable Full HD Second Monitor (option 2)

Mobile Pixels Duex Pro Portable Monitor for Laptops
12.5" Full HD - \$249



Use Tablet as Second Monitor

- iPad: Duet App (\$16) – Win or Mac
- Android: AirDisplay (\$5) or iDisplay (\$5) – Win or Mac



Let People Know You're On The Phone

<https://pro.luxafor.com/>

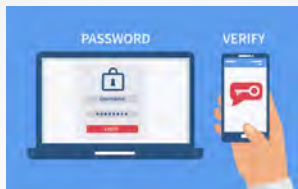


Security Tips

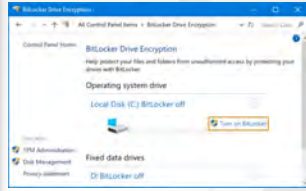


Two-Factor Authentication

- ▶ **Just as Important as a Strong Password ... maybe even more**



Encrypt your PC - BitLocker



Encrypt your Mac – FileVault



VPNs for Public WiFi

Pricing based on 12 mo.

Nord \$6.99/mo.



Tunnel Bear \$4.99/mo.




Hide My \$6.99/mo.



USB Data Blocker

PortaPow USB Data Blocker - \$7 - 2 pack \$12.50



finity

Encrypt Your File Sharing Service

www.Sookasa.com



finity

Encrypted Cloud Storage

Tresorit – YOU hold the Encryption Key!

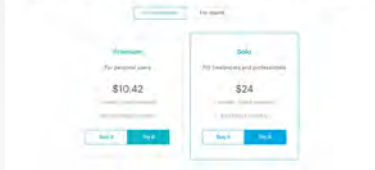


finity

Encrypted Cloud Storage

Tresorit – YOU hold the Encryption Key!

Try the safest place in the cloud without risk



Centralize your Document Management!



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Rebecca Sattin
rsattin@Worldox.com

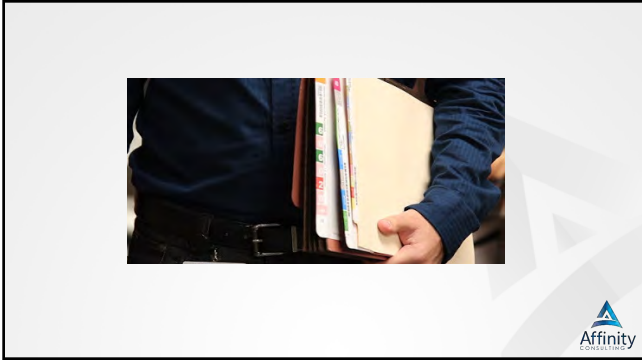


Andy Huber
andy.huber@imange.com



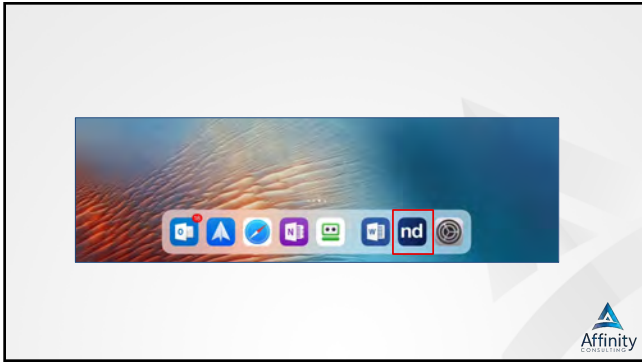
Laptop/iPad/iPhone/Android Devices

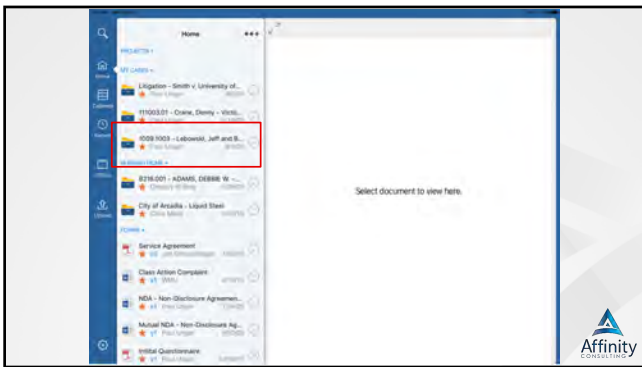


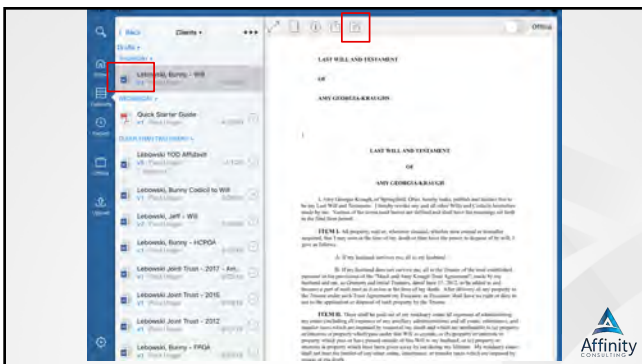


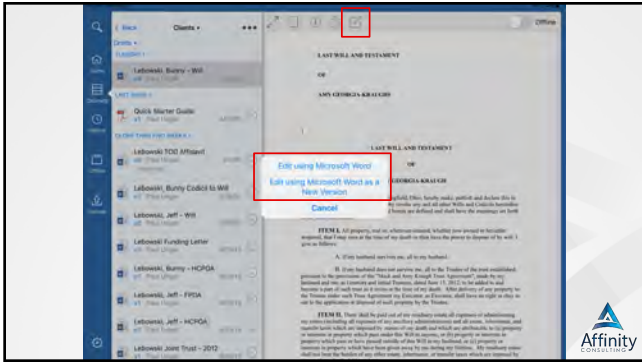


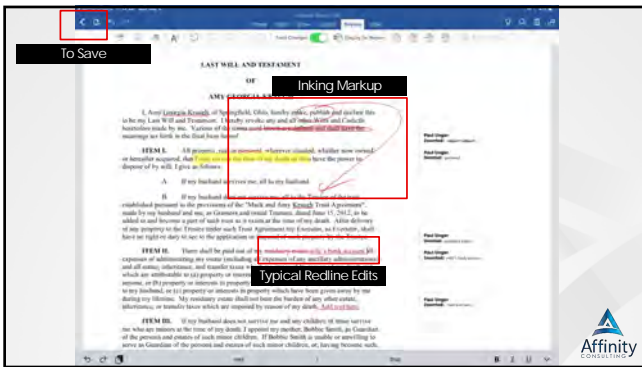


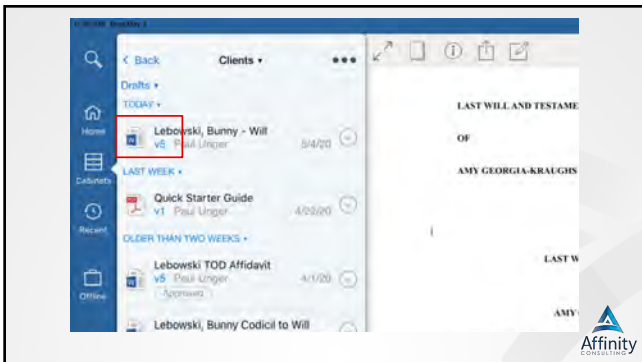












Windows 10 Tips



Windows 10 – Multi-Clipboard

Windows Key + V

Copy Items as you ordinarily do (Ctrl key + C), but use Windows key + V to access all copied items!

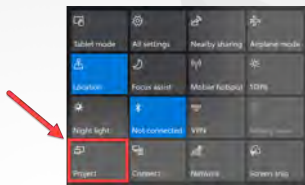
Works in MS Word as well! ... anywhere & any program.




Present Wirelessly for Free in Windows 10

(no more messy wires!)

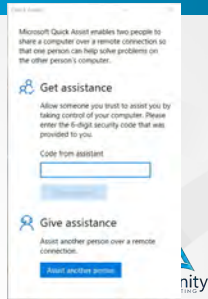
- ▶ **Notifications Icon (lower right corner) > Project > Connect to Wireless Display > Select your Smart TV**



Windows 10 Quick Assist

Start button  > Windows Accessories > Quick Assist

Provide or receive assistance



Emojis in all Windows Applications



Websites



Facts Still Matter

<https://mediabiasfactcheck.com/>




Facts Matter!





PolitiFact.com

Snopes.com

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POLITIFACT
The President's Words

<p>PEOPLE</p> <p>All People</p> <p>Donald Trump</p> <p>Joe Biden</p> <p>Bernie Sanders</p> <p>Elizabeth Warren</p> <p>Amy Klobuchar</p> <p>Pete Buttigieg</p> <p>Andrew Yang</p> <p>Tom Steyer</p> <p>Nancy Pelosi</p> <p>Michael Bloomberg</p>	<p>MEDIA</p> <p>Rundfunk</p> <p>Tucker Carlson</p> <p>Sean Hannity</p> <p>Rachel Maddow</p> <p>Rash Limbaugh</p> <p>Stiggers</p>	<p>TRUTH-O-METER</p> <p>True</p> <p>Mostly True</p> <p>Half True</p> <p>Mostly False</p> <p>False</p> <p>Needs an F.A.C.T.</p>	<p>ABOUT US</p> <p>Our Process</p> <p>Our Staff</p> <p>Who pays for PolitiFact?</p> <p>Advertise with Us</p> <p>Suggest a Fact-check</p> <p>Corrections and Updates</p>
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Is China Producing Corned Beef from Dead Bodies?
Unverified, unvetted postings on social media used photographs from video game promotions to advance tropes about China's food industry.
SAM COOK
PUBLISHED 10 MAY 2018



Where is that Image Online?
TinEye - Reverse Image Search



Reverse Image Search
Search by image and find where that image appears online

Upload, paste or enter image URL

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Photos, Scanning, Images



www.remove.bg

Remove the background of an image for Free

The screenshot shows the remove.bg website interface. On the left, there is a 'presenters' section with a 'Please Note: All in 1 for us to' and two signature images. The main area shows a 'Removed Background' section with a signature image on a checkered background, and an 'Original' section with the same signature image on a white background. There are buttons for 'Download' and 'API'.

www.remove.bg

Remove the background of any image for \$1.99


The advertisement shows a couple in a field with a checkered background. The Affinity logo is in the bottom right corner.


Scan To PDF From Your Phone

The advertisement features the Adobe Scan logo and a smartphone displaying the app interface. Text includes 'Free & Also on Android', 'OCR', and 'Can save directly to NetDocuments'. The Affinity logo is in the bottom right corner.

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- ▶ iOS, Android
- ▶ Web
- ▶ Online Access
- ▶ Share Albums for Free



P 



 **Thank You!!!**

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TAME THE DIGITAL CHAOS - FOCUS & DIGITAL DETOX - 26 WEEK ACTION PLAN

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I can't remember exactly where I was when I heard that China reported the first coronavirus death, but I was in an airport somewhere in North America. I believe it may have been Newfoundland, but who knows. I was on another marathon tour of travel for work. I remember thinking that this sounds like another outbreak of SARS. Admittedly, I wasn't terribly concerned, but I recall washing my hands extra-long throughout the day, and paid special attention to not touching my eyes, nose or mouth, a practice that I have grown accustomed to over the decades of travel in airports.

A few weeks later, I woke up in New Orleans with the worst sore throat that I could remember in decades. I muddled through speaking 6-hours a day throughout that week, elbow bumping people instead of shaking hands. People were not concerned, as they continued to walk into my personal space to ask questions and share stories even though my nose was red and I was clearly congested. I must have gone through 4 boxes of Kleenex in 2 days. I was a mess, but I made it through. I woke up in Columbus on March 6th and fell right back asleep and did not get out of bed for 3 days. I started a self-quarantine March 6th, 2020 and have been home ever since. I remained sick for the next 4+ weeks.

I never thought that a year later I would still be working from home. As of the date of writing this paper, more Americans are dying of Covid-19 than U.S. soldiers died each day in World War II. Other than trips to the grocery store and to visit my mother, I am restricted to home. While I feel that I am tolerating this situation fairly well today, there are days that I do not.

On bad days, and sometimes bad weeks, I am experiencing many of the same problems as so many others similarly situated. Problems:

- Sleeping
- Focusing
- Doom-scrolling/surfing
- Monkey Mind
- Mild depression
- “Cabin Fever”

Sadly, many people are having even more severe problems. Substance abuse is up ... way up! Non-prescribed Fentanyl use is up 32%. Drug-related overdoses are up 18%. Unemployment ... suicide ... death of friends and family.

In researching ways to improve focus and sleep during the pandemic, I ran across some interesting research. Many of the distraction and time management techniques that I have been teaching for years are heavily used. I also picked up some new tools and knowledge. In this paper/plan, I thought it might be helpful to share those and help you assemble an Action Plan. However, I present these techniques in a slightly different way ... as a “NOT to do list.” Here are 26 “Nots” over 26 weeks to detox yourself from information overload and improve your focus.

DON'T TRY TO BOIL THE OCEAN!

First and foremost, focus on each item one week at a time. Go out of order if you want. You make the rules and can tweak the processes as needed. While one item per week may not seem fast enough for you, let me assure you, if you are following 80% of these rules 6 months from now, you will be in great shape. Have a little patience and execute each item consistently. Think of the long game. When you feel ready, move on to another item. If you want to go *a little* faster, go ahead. Be an overachiever. If you stumble, just stop and regroup. Take a week or two and focus on the items that you have already executed. Don't take on a new item until you are comfortably back on the wagon.

PREPARE & CARE FOR YOUR BRAIN



Week 1 - Do NOT Neglect Sleep!

Defeating “Coronasomnia”

Insomnia was a problem before Covid-19. It is no surprise that Covid-19 has piled on even more reasons to lose sleep: stress, “cabin fever,” anxiety, depression, unemployment, death of loved ones. The list is endless. “It’s a problem everywhere, across all age groups,” ... “the increase [of insomnia] is enormous,” said Angela Drake, a UC Davis Health clinical professor in the Department of Psychiatry.

According to the U.S. Centers for Disease Control and Prevention and the National Sleep Foundation (www.cdc.gov/sleep), most healthy adults need 7–9 hours of sleep per night. Good sleep quality is very important. Getting up several times a night or waking up multiple times per night with breathing problems can adversely affect the quality of your sleep.

According to research at the University of Toronto, even just one night of sleep deprivation showed significant decline in cognitive performance. fMRI studies showed declined activity in certain regions of the prefrontal cortex, the same area of the brain that allow for decision-making, problem-solving and planning (Front. Hum. Neurosci., 22 April 2014).

WebMD states that poor sleep leads to significant problems, some of which are very serious:

- Moodiness
- Anxiousness
- Paranoia
- Depressed mood
- Difficulty understanding new concepts
- Forgetfulness
- Lack of focus
- High blood pressure
- Severe headaches

- Diabetes

Dr. Drake from UC Davis provides these tips for better sleep:

- **Keep a normal daily routine:** “If you’re working from home, keep the same schedule as if you were going to work,” Hardin said. “Don’t sleep in or stay up late. When that alarm rings, as painful as is, get up.” And give yourself a break during the day, just as you would in the office. Take a lunch break or go for a walk or just get outside.
- **Create and keep a going-to-bed routine:** “Slow down at the end of your day,” Drake said. “Begin turning down the lights about a half hour before bed. Bright lights will keep your brain from producing natural melatonin (a hormone that is part of our natural sleep cycle and helps us sleep).
- **Avoid screens in the bedroom:** The blue light from cellphones, tablets and computers signals our bodies to stay awake and not release melatonin. “I know this is hard for people, but please put down the electronics. TV is OK but it’s even better to read a book.” Hardin said. “You don’t want that light from a screen right in your face.”
- **Don’t use your bedroom, and especially your bed, as your office:** “You want to train your brain that this is the place where you rest,” Drake said. “You don’t want it saying, ‘This is where you work.’ If you have nowhere else to work, at least don’t work on the bed.”
- **Get some exercise during the day:** It reduces stress and keeps our bodies in their normal rhythms. It’s best, however, to finish the exercise a few hours before bedtime to give your body time to cool down and slow down.
- **Don’t take naps:** A short power nap won’t hurt, if it’s not too late in the day, but sleeping longer will throw off your sleep cycle. “That’s another reason not to worry about one bad night,” Drake said. “It’s better to be tired for a day and then get a good night’s sleep.”
- **Get some sunlight:** It helps keep our circadian rhythms in pattern so we produce melatonin at night, not during the day.
- **Don’t eat dinner late:** “If you’re going to bed at 11 p.m., try not to eat after 7 pm or so,” Hardin said. “You have to

give your body time to digest it. When you go to sleep, your body wants to shut down all the metabolic work, including digestion.”

- **If you wake up in the middle of the night and can't sleep, get out of bed:** A change of scenery helps you reset, but keep lights low and don't do anything that gets you energized. “If you can't sleep for more than a half hour, get up and leave the bedroom,” Hardin said. “Do something simple and monotonous in dim light.”
- **Cut back on news and social media, especially in the evening:** “I've had to limit the news consumption for some patients,” Drake said. “Our brains are not really wired to handle all the constant news alerts and headlines. They're constantly ringing our alarm bells. It's like the car alarm in our brain is constantly going off.”
- **Go easy on the alcohol and caffeine:** They both throw off your sleep patterns. Alcohol can help you fall asleep, but not necessarily stay asleep or sleep well. “Not all sleep is equal,” Hardin said. “We want the right sleep.”
- **Be careful with sleep medication:** Over-the-counter medication can give you fitful sleep or leave you drowsy in the morning, and prescription drugs can create an emotional dependence.
- **Try learning to meditate with one of the many apps available:** “I'm a big believer in meditation,” Drake said. “It can improve sleep and it emphasizes the importance of our mind-body connection. It does take a little practice, but it lowers our stress hormones. We have some new neuroimaging research that has demonstrated the positive changes in the brain.”

(*UC Davis Health*, Newsroom, September 23, 2020)



Week 2 - Do NOT Worry So Much!

“Worrying doesn’t take away tomorrow’s troubles. It takes away today’s peace.”

- *Unknown*

Worrying can be good, but not when it is excessive. For instance, if you have a presentation tomorrow in front of your peers, or a hearing before a new judge, a little bit of “healthy” worrying can be extremely helpful so you can prepare. On one hand, your worries can make you and your organization more prepared for situations. On the other hand, when your worrying is excessive, it can be annoying and even outright paralyzing. It can bring projects to a complete halt.

The science behind worrying is fascinating. The same circuits in the frontal lobes of your brain that allow for superior human intelligence: decision-making, problem-solving, and planning, are also responsible for worry & anxiety. When higher-functioning brain regions are preoccupied with worry, you can’t access them for the other things like decision-making, etc. Worrying takes precedent. When this happens, your amygdala hijacks your brain and puts the brakes on higher-level thinking.

Further, according to the Chopra Center (www.chopra.com), worrying too much can affect both mind and body:

- Disrupted sleep
- Headaches
- Concentration difficulties
- Nausea
- Muscle tension
- Exhaustion
- Irritability
- Elevated cortisol (stress hormone)
- Difficulty making decisions

Breaking the cycle of worry can be difficult but let me share with you two practical strategies that help me.

First, practice mindfulness or another form of meditation. If you are unfamiliar, I strongly recommend a few apps to try on your smartphone that will lead you through short, but very helpful sessions:

- Headspace
- Breathe
- Calm

Second, start a journal to write down those things that are worrying you, and then get back to the work at hand. Also use the journal before you go to bed to write down how you feel. Many times, putting it down on paper can bring clarity. At a minimum, it will reduce anxiety. I write down micro-entries (very short bullet points) in my daily planning journal. It requires 1-2 minutes of my time.



Week 3 – Do NOT Doomscroll or Doomsurf

Ever find yourself unable to put your device down, as you scroll through the infinite number of social media posts on Facebook and the like? Most of it is either bad news or someone painting their lives as perfect with their perfect white picket fence, perfect new job promotion, and perfect 6-pack abs after “working out 365 perfect straight days!” Right? It’s downright defeating. What are we looking for anyway? Some ray of hope? The reality is that it is not only a huge time-suck, but it is harmful to our mental health. What can you do?

- **Set Boundaries:** I found during the presidential campaign season that I had to put limits on my exposure to certain politicians and my use of Facebook. For me, it wasn’t enough to set aspirational boundaries, I had to utilize the iOS Screen Time function to block myself from trying to knock some cyber sense into some of my family and friends because they did not share the same political and moral beliefs. With Screen Time (and similar functions on an Android device), you can completely block yourself from apps during desired hours, and you can limit your total time

to however much time you designate. For instance, no more than 30 minutes a day on Facebook.

- **Replace Doomscrolling with Something Healthy:** If during business hours, anytime you feel the urge to jump on Facebook, instead dedicate that time to reaching out to a colleague or client to check in on them. If during non-business hours, write a letter, card or text message to a family member, or jump on a video call with them. Read a book, go for a walk or run, do pushups, stretch, journal, or clean out a closet.



Week 4 - Do NOT Ruminare – Learn to Tame “Monkey Mind”

Rumination is the process of continuously thinking the same negative or sad thoughts. It occurs during the day, as well as during bouts of insomnia. When some ruminate, they also self-reflect and problem-solve. That sometimes lures people into believing they are doing something healthy or productive.

Related to rumination, but a bit different is “Monkey Mind,” or racing thoughts. Where rumination is someone thinking about the same negative thought, Monkey Mind is someone thinking about many different thoughts. For example, you are working late, and you wish you took that job in Canada, which reminds you that you may want to buy a Thermador, but which one and you don’t have the money. You next start thinking about cooking classes instead, which reminds you of your ex’s terrible cooking, and how you have to fix that nagging roof leak. These thoughts are typically negative as well, and they are all over the place – like a monkey swinging from limb to limb. It is worried, unsettled mental chatter. We sometimes call it catastrophic thinking because nothing goes well, and it usually results in stress over unresolved problems.

Like worrying, fear and jealousy, rumination and monkey mind activates, ... you guessed it ... the prefrontal cortex, the part of the brain that is also associated with logical thinking.

Mindfulness. Practicing mindfulness quiets the amygdala, which reduces the release of cortisol. Mindfulness is a form of meditation that often involves deep breathing. It is an incredibly

important tool because once the emotions are triggered, we need a practical strategy to stop the racing. To learn about these techniques, I recommend either a therapist, life coach, group meditation, or if none of those appeal to you, there are numerous apps that will privately lead you through these exercises like Headspace, Calm, or Breathe (discussed above).

Rumination Diary. Equally important is learning the environmental triggers and figuring out how to manage them. Many experts recommend keeping a journal to record when it happened, what happened right before the ruminations started, how did it make you feel, what were your thoughts, what stopped it?

If Causing Insomnia, Get out of Bed. If rumination is preventing you from falling asleep, it is important to get out of bed slowly and go do something calm like light reading or even meditation. Journaling your thoughts is often recommended, even at night. Stay away from bright light or activity that will keep you falling back asleep. Once calm and the rumination stops, try to return to bed.

Positive Talk + Time Limit. You can also combat the negative thoughts with mind racing positive thoughts. This lessens the likelihood that we begin to obsess over the negative in the first place. Whatever the case, set a time limit of 10 minutes – not a minute longer. After the 10 minutes is up, say to yourself “no thank you, ... I have already thought about this enough. It is time for peace.”



Week 5 - Do NOT Go Without Deep Breathing

One part of mindfulness that I find incredibly helpful is deep breathing (typically 6 breaths per minute). Many promote a 3 count while inhaling, and a 3 count while exhaling, but I have seen small variations of this work just as well. While I talk about this topic in multiple places within this paper, it is so important, inexpensive, and easy that I wanted to dedicate a full week for you to explore and perfect the practice. Perhaps start with deep breathing, and if you like the results, think about mindfulness or another form of meditation.

A 2017 study published in *Frontiers in Psychology* showed that deep breathing resulted in significant improvement on attention, stress and cortisol levels. Deep breathing calms the Amygdala, which reduces the secretion of cortisol (see <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5455070/>).



Week 6 - Do NOT Neglect Your Brain by Feeding it Poor Nutrition

We too often fill our bodies with unhealthy food that can impair our ability to focus. In the short term, we can experience a food coma after eating too heavily at lunch or consuming too much sugar when snacking. It leaves our brains foggy. In the long term, we may develop chronic diseases that limit our activities and enjoyment of life.

An easy way to achieve better nutrition is by implementing a handful of healthy boundaries. Here are some examples of healthy food boundaries that will lead to weight loss and healthier lifestyle, without having to commit to a formal diet. Adjust these examples to help you control some of your own vices.

- I will not consume more than one 3 oz bag of potato chips per day.
- I will not consume more than 250 calories of sugary snacks.
- I will not eat after 7:00 pm.
- I will always eat a single serving of plain oatmeal for breakfast Monday through Friday.
- I will not consume more than 2000 calories in a single day.
- I will eat no more than 1 small bowl of ice cream per week.
- My dietary intake will be 90% plant-based and 10% animal protein.
- I will replace 90% of my current unhealthy snacks with fruits and nuts.
- I will drink no less than 12 glasses of water per day.

GIVE YOUR BRAIN A SENSE OF CONTROL

When you feel in control, it calms the amygdala and stress response. This is why we always feel more focused and less stressed when we have a plan.



Week 7 - Do NOT Begin Your Day Without a Plan

Instead of jumping into email, begin your day by operating from your daily roadmap. Commit to a 5-minute planning session with yourself at the end of the today for tomorrow or start your day with a 5-minute planning session. If you don't have a plan, you will become part of someone else's plan!

Use the Tame the Digital Chaos daily planning sheet, or another commercial planner like Best Self Journal or Covey, for this and time block your day on paper, remembering to state some 30,000-foot goals for the day. Blank planning sheets are included at the end of this handout. Recite 3 things that you are thankful for. Put a plan together for your day *before* diving into email. You can always adjust as the day unfolds but start with a plan! Consider doing your plan at the end of the previous day and spend a couple minutes in the morning reviewing it instead of jumping into email. Also be sure to cross things off from your list as you complete them to give your brain a shot of feel-good dopamine.

Date: 2/18/2021

PRIORITIES

1. Review Medical Record Requests
Jones Smith Dine Davis Settlement K Agreed Order
2. Washington Settlement
3. Smith Depo
4. Prep for Retreat
- 5.

TODAY'S TIME BLOCKING

7:00	Walk dog - Short run
8:00	Business Development
9:00	Medical Records Review
10:00	Email
11:00	Smith Depo Prep
12:00	Smith Depo
2:00	Email - Admin - Butter - Lunch
3:00	Washington Settlement
4:00	Retreat Prep
6:00	
7:00	Date Night + Netflix
8:00	
9:00	

GRATEFUL THOUGHTS ☺

1. Mom
2. My Health - lab results
3. Jane - send a card today ☺

NOTES

Appliance Repair 867-5099

New phone?

Week 8 - Do NOT Start Your Day Without a Team Huddle

Instead of diving right into your email or your first appointment or project, after your 5-minute daily planning session (above), have a quick huddle with your immediate team. We call this the “lightning round.” Each person has 60 seconds to recite what they have going on that day in detail, and broadly for the rest of the week. This encourages communication and awareness of projects, and almost always results in shifting some tasks and schedules around to better distribute work and help each other. It also reduced interruptions during the day because everyone is more aware of deadlines around the team.

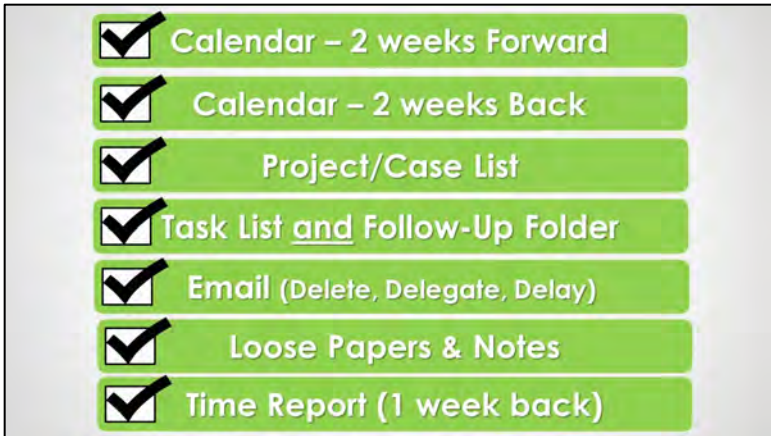
If your team works from home or multiple locations, use tools like Zoom, Teams, or GoToMeeting. Be disciplined about time. Beware of “meeting creep.” If the meetings constantly go over, it is no longer a huddle, and people will quickly grow annoyed. Larger teams should think about breaking into smaller huddles, so this doesn’t turn into a 30 minute meeting.

Week 9 - Do NOT Begin Your Week Without Weekly Planning

A once-a-week “get organized” deep dive is absolutely essential to successful time and distraction management. This is a 60-minute commitment once a week. It will help you frame realistic daily planning, clean your workspace, eliminate piles, review all tasks and deadlines on your plate, catch up on tasks that slip between the cracks, and keep focused on the big picture goals that you want to achieve. It will help you stay driven. Failing to plan is planning to fail.

It is extremely helpful do your weekly deep dive planning session on the same day and time each week. Performing this one-hour ritual on the same day and time each week will make it infinitely easier to develop a habit of engaging in this important planning.

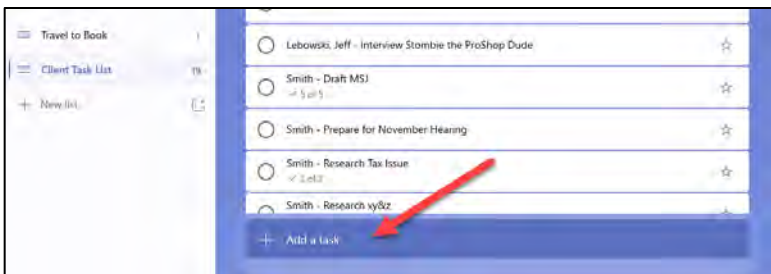
Try to do your deep-dive 2 to 3 days before starting the next week.



Week 10 - Do NOT Fail to Write Down Tasks and Random Neural Firings

The main reason tasks and deadlines slip between the cracks is because people fail to immediately write them down in an organized system. The reason they don't enter them into an organized system is because they are too cumbersome to record, especially when they are not at their computer.

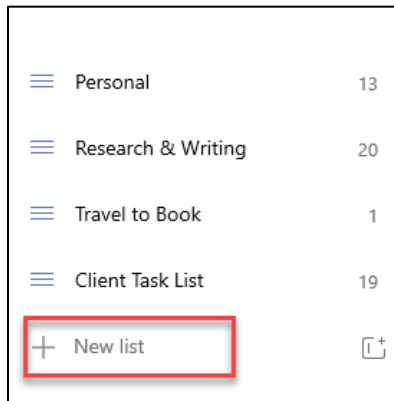
The answer to this problem is an application like Microsoft ToDo. ToDo is available on your PC, Mac, Tablet, iPad, iPhone, Android Phone, and on the web. No matter where you access that list, it updates it everywhere. Most importantly, it is a beautifully easy-to-use program:



To add icing on the cake, Microsoft ToDo integrates seamlessly with Microsoft Outlook. Any task that you create in one application will be created in the other.

☑ **Week 11 - Do NOT Keep 20 Different Lists**

Having tasks in too many locations is a major faux pas. If you have to look in 20 places for information or tasks, you are bound to miss something. Microsoft ToDo is a great solution for this problem because you can create and organize your lists very easily. Keep your task lists simple. Here is how that looks in Microsoft ToDo:



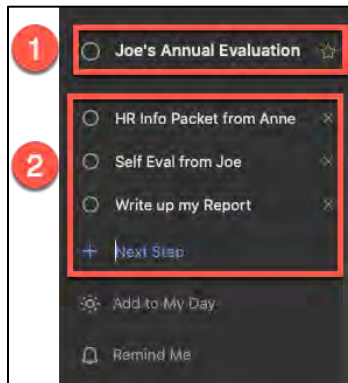
☑ **Week 12 - Do NOT Use Poor Descriptions in Your Task Lists!**

When you read descriptions in your task list, are they vague? Do you know exactly what you need to do next? Here is a common example of a task list that I see when I do one-on-one coaching:

- Work on the Smith Case
- Jones Hearing
- Davis Settlement
- Joe's Annual Evaluation

While you may have known what these descriptions meant when you wrote them, (1) none of them articulate exactly what next action step you must do, and (2) chances are if you know what those next steps are right now, you probably will forget those details by tomorrow or the next day. One of the primary reasons why we procrastinate is because we don't know that next step or where we left off.

Using one of the examples above, I can't start Joe's Annual Evaluation until I receive his HR information from Anne and I get Joe's self-evaluation. So, a better way to record the task is to provide the details of the next steps. This is how that would look in a task list like Microsoft ToDo:



1. Main Task Description
2. Steps or Subtasks with Detail

☑ **Week 13 - Do NOT Underutilize Your Calendar**

Many people simply leave tasks, deadlines, and ticklers in their task list and set up “Reminders.” While that works for some people, it doesn't work for the majority of people. Having a task on a task list is vital because it stays there until it is marked complete. However, if it is 1 of 100 other tasks, it might get lost in the weeds. Scheduling the task on your calendar is important because you can see it clearly on a particular date. That date may be the date that it is due, or the date that you are blocking off time to work on it. Having the task

in both places is important because if you fail to get something done on a certain day and it is only recorded on the calendar, you may fail to remember to do that task unless you go back and look at a previous date. If it is on your task list also, it will still be there as unresolved. This dual system is key for certain tasks that have deadlines. I don't think it is essential for all types of tasks. For instance, I would rarely, if ever, put "buy milk and eggs" on my calendar. However, if I must have a contract drafted by a certain date, I will most likely have that in my task list, in my calendar on the date that it is due, and in my calendar as an appointment with myself to work on it.

There are three categories of events that people fail to record on their calendar:

- Time Blocking - appointments with yourself to do a task.
- Ticklers - reminders to check in with someone or see if you received something from someone.
- Deadlines - hard deadlines for a project or deliverable (*e.g.*, draft a contract for the Davis case).

The bottom line is that we must get in the habit of recording tasks *and* scheduling deadlines *and* block off time to perform that work on our calendar.

Example—Opinion Letter on § 501(c)(3) Status of ABC Corp. This is DUE on December 1, 2020 to the client. What entries might you want to make?

- Record the task in Microsoft ToDo with the DUE DATE and a reminder 3 days before at 9 am. "ABC Corp - Opinion Letter" with all needed details in the steps or notes section. (TASK ON TASK LIST).
- Create an appointment in Outlook on December 1 at 9 am: "ABC Corp - Opinion Letter DUE to Alex Smith" (DEADLINE ON CALENDAR). You may also want to record needed deadlines within any firm-required systems, like a practice management program or a docketing system.

- Create an appointment in Outlook on November 17th from 2–5 pm to work on Opinion Letter (TIME BLOCKING).
- Create an appointment in Outlook on November 26th from 3–5 pm to finalize Opinion Letter. (TIME BLOCKING)
- Create an Appointment on November 13th to check in with associate Barb on the status of her research and opinion letter (TICKLER).

MANAGE DISTRACTIONS

Week 14 - Do NOT Keep Your Outlook Inbox Up on Your Computer Monitor All Day

Stop checking your inbox 70+ times a day! Your inbox is one of the most disruptive tools if you are trying to focus on project work, billable work, or deep level work. It's like choosing to write a complex brief or letter in a war zone or a nursery full of screaming children. Literally every 2 to 3 minutes, a bomb is landing in your inbox. How can one possibly focus while working in an environment like that? Instead, skim your calendar in the morning and decide how many times and for how long you can batch process your emails that day. Every day will be different. Aim for something reasonable like 5 times a day (the average American worker checks email an idiotic 74 times a day!).

Be more deliberate about when you check email by batch processing email, following the 3-minute rule and the 4 Ds. For instance, instead of checking email 74 times a day, you may only check it 5 times a day:

Today's Batch Email Processing	
7:30 AM	15 minutes
10:00 AM	30 minutes
12 Noon	90 minutes
4:00 pm	30 minutes
5:00 pm	15 minutes

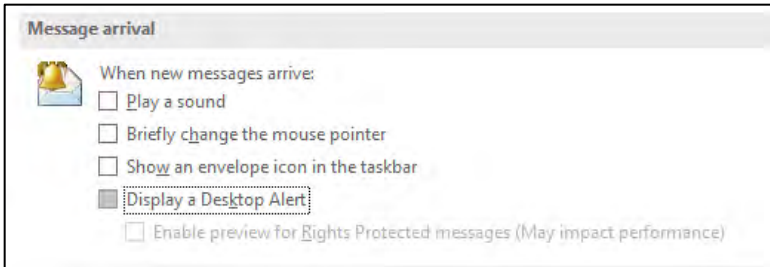
Use your dual monitors to display documents or information that is relevant to the work that you are performing, not your inbox.



Week 15 - Do NOT Turn on Notifications

We all should be aware of the perilous cost of task-switching. Notifications are invitations to task-switch. They are like a dozen little devils sitting on our shoulder, tempting us to do everything except what we are supposed to be doing, and those devils have a direct hotline to our brain. Why would we give the world a hotline to our brain? Turn all notifications off—and I mean ALL of them, including those on your smartphones. In Outlook, email notifications can be turned off by navigating to **File > Options >**

Mail and deselecting the four different methods of notifying you when a new message arrives.



☑ **Week 16 - Do NOT Answer All Calls as They Come In**

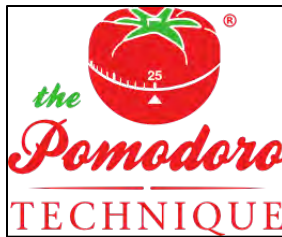
We never want to miss an important call, but you one must balance this with work that needs to be finished. If your job is sales/business development, you probably will take more calls as they come in, even from unknown callers. If your job is mostly project work, you should answer fewer calls as they come in. If you have a receptionist or use service like Smith AI virtual receptionists (www.smith.ai) Ruby Receptionists (www.ruby.com), perhaps they can field and filter these distractions. When we take calls from unknown callers, we run the risk of derailing our day by getting sucked into a conversation that we aren't prepared to resolve. It is always a little dangerous. Retrieve the message, do any needed research, and then call the person back in a timely manner with all the needed answers (batch return telephone calls, just like we should do with emails).

Week 17 - Do NOT Multitask!

It is not enough to say that multitasking is bad. We need to practice single tasking. We need to clear our desks *and* our multiple monitors of information that is not directly relevant to the project that we are executing. One way to do this is using the Pomodoro Technique®. Pomodoro is an easy technique that utilizes the 25-minute tomato timer. We single-task (preferably deep-level work/project work) for 25 minutes and then take a break and do

whatever we want for 5 minutes. In other words, we work in intervals. The human brain functions very well maintaining attention to a single task for 25 minutes. After 25 minutes, we begin to lose focus. By giving ourselves a 5-minute break, we easily can return to and focus on deep-thought work for another 25 minutes. This technique will make a huge impact on productivity and will also help combat procrastination. Think about it—we can endure even the most tedious dreaded task for 25 minutes, right? Once we get a little momentum going and we get immersed in the project, it becomes a lot easier. If you feel like adjusting the time a bit, go for it. I many times go 40 minutes with a 10-minute break.

If you really like this concept, the Pomodoro Technique book is a quick read and very affordable. See <https://francescocirillo.com/pages/pomodoro-technique>.



Week 18 – Do NOT Juggle Tasks Without Some Juggling Tools

Let's face it, sometimes we cannot avoid juggling emergencies. We are forced to task-switch. If you aren't one of the lucky 1-2% of the population who is a "supertasker," you better have some juggling tools at your disposal to mitigate the cost of task-switching.

1. Know Where You Left Off

Have a dedicated place to write down or mark where you left off and note when you get back, "I will do __x__." Before jumping to another task, take 15 seconds and write down this information. For instance, I draw a little hazard icon and write down where I left

off/what I must do next. Sometimes I will even use a highlighter to draw more attention to it.



Finish review of restrictive covenant clause, then draft Landlord Duties.

2. **Quick Deep Breathing – Mind Check Before Commencing the New Task**

You don't have to commit to a 15-minute mindfulness session with yourself to experience the benefits of deep breathing. You can benefit from 15-30 seconds and you don't even need to close your eyes if you don't want to. I discuss the benefits above, but in short, even a few deep breath starts calming our amygdala in our brain.

Here's how: Shift your breathing from your chest to your belly. Breathe in slowly (a 3-count) and say the word "Relax" on your inhale and then exhale slowly and say the words "my Chest" (again on a 3-count).

Then do your best to get oriented and then dive in.

3. **Timer to Switch Back**

When I used to work in a restaurant kitchen, we had to juggle many things. I could have 5-10 different food items cooking at once. It was impossible to manage without timers.

With office work, we are often doing one thing and then get pulled into a telephone call or a conversation. To remember to switch back, set a timer. The easiest way is to use your smartphone:

"Hey Siri, set a timer for 15-minutes."

4. **Use Checklists**

If you constantly get pulled in multiple tasks, use checklists to minimize the possibility of missing

something important. It can also make more cognitive demanding tasks less cognitively demanding because you don't have to memorize as much.

5. **Pick Tasks That Use Different Areas of the Brain**

It isn't always possible, but if you can, pick a motor task that doesn't compete with a cognitive task.

For example, applying labels on envelopes (motor task) or warming up lunch in the microwave (motor task) along with a cognitive task like returning a call to your spouse. Be careful though, you may end up microwaving your envelopes if you try too much.

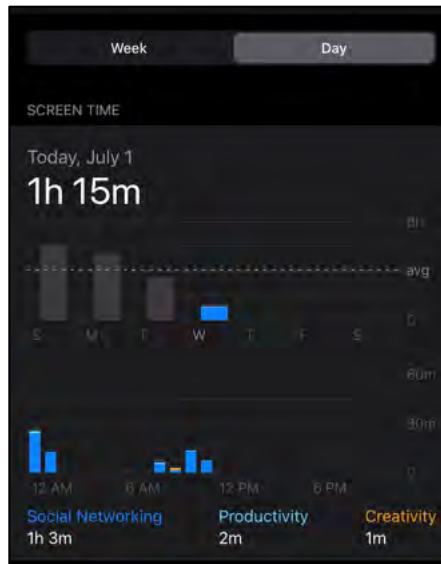


Week 19 - Do NOT Carry Your Phone 24/7

Let's face it, that smartphone is a ball and chain. If you don't believe me, take a "phone fast" by leaving your phone in your car's glovebox or briefcase for a half or whole day while you are at work. Let your loved ones know how to reach you at the office in case of an emergency. You will feel liberated. It is incredible how often we look at our phones during the day. It is having a terrible impact on productivity.

If for some reason, you cannot leave your phone in your briefcase, then turn off notifications on your phone and set up a VIP list for exceptions (a sick loved one at home, etc.).

Also, take advantage of screen-limiting technology. For example, on your iPhone, you can use Screen Time. Go to **Settings > Screen Time**. You can view reports about how much time you have spent on your phone, within certain apps, as well as block yourself from apps during specific hours. I do this during election season to prevent myself from engaging in useless debates on Facebook. I find it extremely effective.



Week 20 - Do NOT Live in Social Media 24/7



Check social media 1 or 2 times at the most during the workday (unless you are engaging in business development or marketing). In fact, think about taking a 30-day “social media fast” from all social media, and I mean all of it - Facebook, Instagram, LinkedIn, etc. - ALL OF IT. It is addictive and a huge productivity zapper. Give yourself a limit of 15 minutes a day. Set boundaries for yourself.

Social media companies design their platform using incredibly manipulative techniques to draw us in. They utilize color, monitor what we are searching for on Google to customize feeds that get your attention, and worst of all, using artificial intelligence, they know exactly what kind of posts are going to pull you in (political posts, posts about hot issues, etc.). Sometimes the best way to avoid this enticement is to stay away, especially during business hours.



Week 21 —Do NOT Micro-Manage and Solve Everyone’s Problems!

When you micro-manage people, you are inviting dozens of interruptions during the day. Empower the people that you pay to

solve problems on their own and think for themselves. When colleagues come to you and ask what they should do, or ask how to solve a problem, the first thing out of your mouth should be:

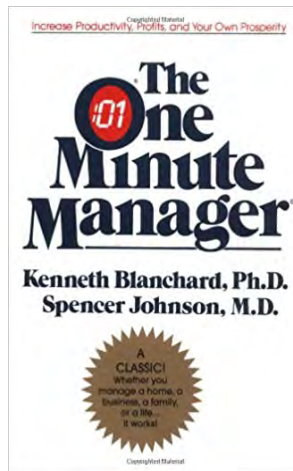
“How do you propose that we solve this problem?”

or

“I want you to think about this and do a little research and present to me 2 or 3 possible solutions and then let’s talk.”

We need to get our team members to a place where they know how to problem-solve. You need to be able to delegate those problems and trust that they get resolved. Build your team members’ confidence enough so they can make more decisions on their own, or, at a minimum, present the right recommendations to you.

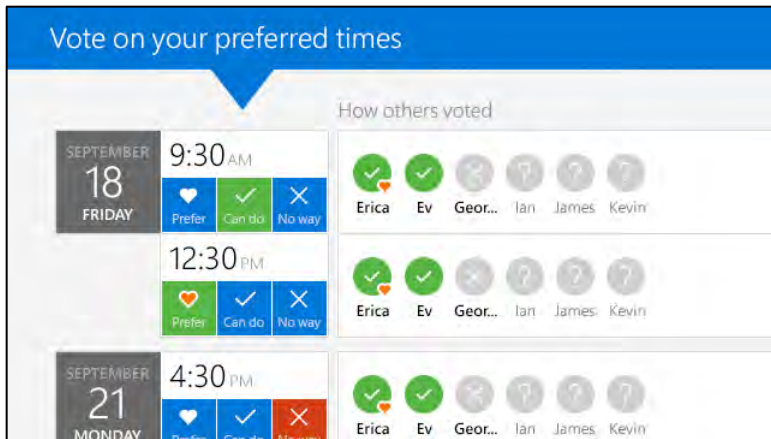
One of my favorite books on effective delegation is *The One Minute Manager* by Kenneth Blanchard and Spencer Johnson. It is available on Amazon for less than \$20.



Week 22 - Do NOT Create More Emails for Yourself

Don’t create more emails for yourself from your responses. As an example, when trying to schedule an appointment with someone

or multiple people, use applications like Doodle or Microsoft FindTime, rather than asking when everyone is available to meet. Send a quick, easy-to-create poll with FindTime or Doodle where everyone can vote on their preferred times. It holds all proposed dates on your calendar as tentative until the poll is closed and you, as the organizer, can pick the final time. Then the program sends the invitation out to all participants. It makes herding cats easy as pie, and you aren't blowing up everyone's inbox with dozens of emails from the responses.



Also, to avoid getting 10 more questions from your response, don't be vague in your emails. Always think about how to resolve the email without sparking more conversation.

Week 23 - Do NOT Process Emails All by Yourself

If you get a large volume of email every day, think about allowing a trusted assistant to help you process and respond to the email. I realize this may not be possible right away, and maybe never possible for some people, but if it is, you should strongly consider it. First and foremost, you need an assistant that you can trust with sensitive information. Second, you may need to set up an alternative email account so you can receive HR-related emails or emails from your partners, without your assistant having access to that content. Third, you need to contact your IT folks to have them give your assistant access. If using Outlook, only your Microsoft Exchange

administrator would be able to give these permissions to your assistant.



Week 24 - Do NOT Do Shallow Work First Thing in the Morning

Many times, it is best to tackle deep-thought work early in the day when you are rested. Dive into deep-thought work like writing and projects early morning when you have the most energy. There is little question about it . . . our brains function better following quiet time or sleep. We also know that we can be highly productive while the rest of the world is sleeping because there are far fewer (if any) interruptions. This can be one of the most productive times of the day.



GET TRAINING & GET ORGANIZED



Week 25 - Do NOT Neglect Adequate Training

Most professionals neglect training for themselves and for their team. This happens at multiple times and on multiple levels:

- **Onboarding:** We fail to have an adequate training plan for onboarding new employees. Instead, we train our people how to drive by throwing them onto the highway.
- **Ongoing Training:** Education should never stop. That's why we have the phrase "Continuing Education." Technology never stops, new situations continuously arise, and laws are constantly changing. This means we need to stay on top of those changes and adapt.
- **Software Training:** Invest in software training whenever possible. Live onsite hands-on training is always the best, but it isn't always possible. Look at tools like www.AffinityInsight.com or www.lynda.com. These solutions provide all-you-can-eat, on-demand online training for your employees, covering most of the software solutions that you use on a daily basis.
- **Process Training:** Train your people how to improve your processes, not just how to perform the existing process. This means you need to explain the "why" behind the process, in addition to the process.

At the end of the day, when people know how to do their job and the "why" behind it, they will always be able to do things more efficiently and be able to focus on the tasks with much less stress. Education and skills bring clarity and focus. Not knowing how to do something properly can be very stressful and counterproductive.

Week 26 - Do NOT Maintain a Paper File! Fight the Paper

To achieve effective time, document, and email management, we have to get organized. In order to resolve email without delay, you have to be able to find an answer quickly or know where you left off. If your documents for the Jones case are scattered and you have to look in multiple locations, that is inevitably going to result in taking 5 times as long to answer the question and delay your response to the email until you have 30 minutes to find the answer. Here are common areas where information is scattered and located:

- In a paper file called “Jones, Bill - Tax Issue”
- In an inbox
- In an inbox subfolder called “Jones, Bill”
- In a folder on the S drive: S:\Clients\Jones\General
- In a folder on your laptop: My Documents\Firm Stuff\Tax Issues\Jones

In order to be organized, we absolutely must figure out how to manage digital information in one central digital location. To make matters worse, many professionals still maintain a paper file as well. It is an enormous waste of time and money to maintain a paper file. Paper files are nearly useless anyway in these post-COVID days. Only one person can access a paper file at a time, and it is extremely time consuming and costly to store all email and other information.

Bottom line: Invest in a document management system and “Fight the Paper.” Save emails into a central repository, as described above. Ultimately, all emails and documents for a project, case, or matter should be stored in one central location for everyone on the team to access. Tools like NetDocuments, Worldox, and iManage are perfect for this situation. Microsoft SharePoint may even be an option if it configured correctly.

APPENDIX

TDC DAILY PLANNER

The Tame the Digital Chaos (TDC) daily planner is designed to help you plan and maximize productivity on a day-to-day basis. These are undated pages that you fill out each day, as described above in **Error! Reference source not found.**, Task Management - Daily Planning. A bound print version of the planner will be available at www.pauljunger.com March 1, 2021, but in the interim feel free to print undated pages and fill them out daily. Here is a sample completed page. The next 2 pages contain the unfilled and undated blank form. Also consider the numerous paper-based planners on the market such as Best Self Journal, Panda, etc.

Date: 2/18/2021

PRIORITIES

1. Review Medical Record Requests
Jones
Smith
Dre
Davis
2. Washington Settlement
Settlement K
Agreed Order
3. Smith Depo
4. Prep for Retreat
- 5.

GRATEFUL THOUGHTS

1. Mom
2. My Health - lab results
3. Jane - send a card today 😊

TODAY'S TIME BLOCKING

7:00	Walk dog - short run
8:00	Business Development
9:00	Medical Records Review
10:00	Email
11:00	Smith Depo Prep
12:00	Smith Depo
1:00	
2:00	Email - Admin - Butter - Luna
3:00	
4:00	Washington Settlement
5:00	
6:00	Retreat Prep
7:00	
8:00	Date Night + Netflix
9:00	

NOTES

Appliance Repair 867-5399

New iPhone?

Date: _____

PRIORITIES

1		
2		
3		
4		
5		

GRATEFUL THOUGHTS

1. _____
2. _____
3. _____



TODAY'S TIME BLOCKING



7:00 _____

8:00 _____

9:00 _____

10:00 _____

11:00 _____

12:00 _____

1:00 _____

2:00 _____

3:00 _____

4:00 _____

5:00 _____

6:00 _____

7:00 _____

8:00 _____

9:00 _____

NOTES

Best in Mobile Apps for Legal Professionals

April 7, 2021

Presented by:

Paul Unger

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Materials Written by:






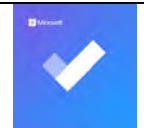
Jeffrey Schoenberger






Paul Unger







Affinity Consulting Group







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Core Microsoft Productivity Apps






	App	iOS?	Android
	<p>Microsoft Word for iOS Allows you to edit Microsoft Word documents in their proper format. Free version allows viewing and basic edits.</p>	Y	Y
	<p>Microsoft Excel for iOS Allows you to edit Microsoft Excel spreadsheets in their proper format. Free version allows viewing and basic edits.</p>	Y	Y
	<p>Microsoft PowerPoint for iOS Allows you to edit Microsoft PowerPoint presentations in their proper format. Free version allows viewing and basic edits.</p>	Y	Y
	<p>Microsoft OneNote for iOS Type or handwrite notes in Microsoft OneNote. Collaborate/share notebooks with other users. Works across all ecosystems.</p>	Y	Y
	<p>Microsoft Outlook for iOS Outlook Calendar, Email, Contacts in mobile app.</p>	Y	Y
	<p>Microsoft To Do Fantastic Task List/To Do List that synchronizes with your Outlook Tasks.</p>	Y	Y

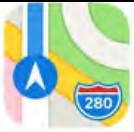





	App	iOS?	Android
	PDF Apps		
	PDF Expert – \$9.99Y An excellent PDF viewer and annotator. Similar to GoodReader but also allows for filling out PDF forms and signing documents.	Y	N
	GoodReader One of the original PDF viewers and annotation tools. Solid choice and good alternative to PDF Expert.	Y	N
	PDFelement Excellent PDF viewer and annotator for Android devices.	N	Y
	PDF Max Excellent PDF viewer and annotator for Android devices.	N	Y
	Litigation or Legal-Specific		
	Fastcase – Free Legal Research	Y	Y







	App	iOS?	Android
	TranscriptPad – \$89.99 Best transcript management app for the iPad. Transcripts must be in the .txt file format.	Y	N
	TrialDirector – Free The companion iPad app for the desktop TrialDirector software.	Y	N
	TrialPad – \$129.99 Best trial presentation app available for the iPad.	Y	N
	Case Notebook E-Transcript – Free App that will accept and let you read E-Transcript files (.ptx). Cannot organize transcripts by case or issue code like you can with TranscriptPad.	Y	N
	iThoughts – \$11.99 A mind-mapping app for the iPad that allows you to visually construct your notes and thoughts.	Y	N
	LawStack – Free (but individual books are IAP) Free app that allows you to purchase books that you need to carry around with you such as the Federal Rules of Civil Procedure. Updates happen through in-app updates.	Y	N







	App	iOS?	Android
	MindNode 6 – Free (\$9.99 IAP) Mind-mapping / brainstorm alternative to iThoughts.	Y	N
	Mindomo Mind-mapping app for Android devices.	N	Y
Cybersecurity & Password Management			
	Nord VPN (\$3.99/mo) Nord VPN gives you access to one of the best and easiest VPN services.	Y	Y
	TunnelBear VPN – (\$4.99/mo) The TunnelBear app gives you access to one of the best and easiest VPN services.	Y	Y
	Dashlane Password Manager (Free - \$59/yr) Highly rated password manager app that syncs with your PC, Mac, iPhone or Android-based phone.	Y	Y
	LastPass Password Manager (Free - \$35/yr) Highly rated password manager app that syncs with your PC, Mac, iPhone or Android-based phone.	Y	Y







	App	iOS?	Android
	1Password – \$3 & up per month The 1Password app syncs with your Mac and Windows desktop software to ensure that you have access to all of your passwords from any device.	Y	N
	Authy – Free Two-Factor Authentication	Y	Y
	Google Authenticator - Free Two-Factor Authentication.	Y	Y
Mobile Scanning			
	Scanbot - Scanner App PDF OCR – Free (IAP) "Scan" documents by using the iPad's camera and create PDF files. Pro feature upgrade includes ability to OCR documents.	Y	Y
	Scanner Pro Fantastic scanning app for scanning that includes OCR. Scanner Pro is available on Android devices, but from a different maker (AppDev Technolabs)	Y	Y
	ScanBizCards – Free to \$5.99 Scan and convert paper business cards to your electronic address book (Apple, Outlook, etc.)	Y	Y

	App	iOS?	Android
	Note-Taking Apps		
	GoodNotes 5 – \$7.99 Another excellent note-taking app that can also convert your (legible) handwriting into editable text.	Y	N
	Evernote (\$4.99) Cloud notes, organizer available on the web, iOS or Android.	Y	Y
	Microsoft OneNote for iOS (part of O365) Type or handwrite notes in Microsoft OneNote. Collaborate/share notebooks with other users. Works across all ecosystems.	Y	Y
	Notability – \$9.99 One of the best apps for typing and handwriting notes on the iPad. Can also record audio while you take notes and syncs the audio with your notes.	Y	N
	Other Law Office Business Apps		
	AnyList – Free (\$9.99/\$14.99/yr IAP) Grocery List to share across family and iOS & Android.	Y	Y







	App	iOS?	Android
	Apple Maps – Free If you use an iPhone and an Apple Watch, the Apple Maps app is fantastic because it communicates with the watch, causing it to vibrate, letting you know whether to turn left or right at a particular intersection.	Y	N
	AroundMe – Free (\$2.99 IAP) Find businesses around you. Quickly identifies your position and allows you to choose the nearest Bank, Bar, Gas Station, Hospital, Hotel, Movie Theatre, Restaurant, Supermarket, etc.	Y	Y
	Audible – Subscription Service (\$16/mo.) Audio Books	Y	Y
	Amazon Kindle – Free Still one of the best options for e-books, the Amazon Kindle app is free for iPhone and iPad.	Y	Y
	Calcbot 2 – Free Intelligent calculator and unit converter for the rest of us.	Y	N
	Dictate + Connect – \$16.99 Dictation on the iPhone or iPad. Alternative on an Android device is Voice Notes (see below).	Y	N








	App	iOS?	Android
	Dictionary.com – \$3.99 We all need access to a good dictionary, and the Dictionary.com Pro app for the iPad is one of the best.	Y	Y
	Duck Duck Go – Free Track free searching. GREAT alternative to Google.	Y	Y
	iTimeKeep - \$499/yr annually Timesheets on your mobile device that has direct integration with your time, billing & accounting system.	Y	Y
	iMovie – Free Video recorder and editor. Android alternative is VideoPad.	Y	N
	Just Press Record - \$4.99 (or Apple's Voice Memo app)	Y	N
	NetDocuments – Subscription App for their cloud-based legal document management system. Competitors are Worldox, iManage and OpenText.	Y	Y



	App	iOS?	Android
	OmniFocus – Free (\$49.99/\$74.99 IAP, or \$9.99/mo. Including Mac and web access) Personal task manager	Y	N
	Overcast – Free (\$9.99 IAP removes ads) The app for listening to podcasts on your iPhone or iPad. You can speed up the audio so that it takes less time to listen to a podcast. Google Podcasts is good alternative for Android devices.	Y	N
	OverDrive – Free Borrow eBooks, audio books and streaming video on your iOS or Android device.	Y	Y
	Pinner for Pinboard (\$4.99 + Pinboard subscription (\$11 or \$25/yr)) Bookmark tagging and organizing.	Y	Y
	Productive – Habit Tracker – Free (various IAP) To Do List and Goal Planner	Y	N
	Reeder 4 – \$4.99 Many of us still subscribe to RSS feeds to stay on top of the news every day, and the Reeder app is one of the best options for the iPhone and iPad.	Y	N

	App	iOS?	Android
	Signal - Private Messenger – Free Encrypted Private Messenger. Alternative – WhatsApp.	Y	Y
	Soulver – \$2.99 Text editor and calculator. Use words alongside numbers and do calculations over multiple lines. Ingenious alternative to a calculator.	Y	N
	Speedtest by Ookla – Free Test internet speed on web or from app.	Y	Y
	Syncronicity Pro for Exchange - \$4.99 See other team member calendars if using MS Exchange.	Y	N
	Time Jump – Date Calculator – \$2.99 Date calculator (i.e. Calculate 28 days from today)	Y	N
	VideoPad – Free Video editor for Android.	N	Y

	App	iOS?	Android
	Voice Notes – Free to \$59.99 Quick recording of ideas. Also does voice to text.	N	Y
	Zones – Free (\$2.99 IAP) Time Zone Calculator	Y	Y
	Other Miscellaneous		
	Blood Pressure Companion Pro – \$0.99 Bluetooth-based blood pressure tracking.	Y	N
	Cash App (by Square Inc.) – Free Transfer funds to family/friends/vendors.	Y	Y
	Dark Sky Weather – \$3.99 Award winning weather app.	Y	Y
	Dexcom – Free Continuous Glucose Monitoring Health App.	Y	Y

	App	iOS?	Android
	Disney+ – \$6.99/mo.	Y	Y
	Felt – Free (but approx. \$3.99 to send each card) Everyone likes to receive handwritten notes in the mail, but what if you don't have fancy stationery and envelopes? Use the Felt app to handwrite a note on your iPad and pick a lovely card – they'll send it for you!	Y	Y
	HBO GO / Cable & TV Apps Generally – Free (requires a subscription)	Y	Y
	HomeKit / Smart Home Apps – Free There are a slew of apps that let you control lights, outlets, door locks, thermostats, and security cameras, among other things, from your phone. I personally use Philips Hue Lights and an Ecobee thermostat.	Y	N
	iExit Interstate Exit Guide – Free iExit tells you what's at upcoming exits when you're on the highway. It uses your device's location to determine where you are on the highway	Y	Y
	inRoute Route Planner – Free (IAP) Plan optimal routes or chart your own course using weather, elevation, curves and more. Then navigate safely with voice-guided, turn-by-turn directions that automatically check your route for severe weather. Great alternative available on iOS and Android is Waze (see below).	Y	N

	App	iOS?	Android
	Instapaper – Free (IAP) Save and store articles for reading: offline, on-the-go, anytime, anywhere, perfectly formatted	Y	Y
	Key Ring Rewards Cards – Free Add all your reward cards to the Key Ring app and stop carrying around a hundred-pound key ring with dozens of reward cards.	Y	Y
	MLB At Bat – Free (requires a \$20/yr subscription) Essential for baseball fans.	Y	Y
	Prime Photos from Amazon – Free Store, backup and organize photos.	Y	Y
	Spotify – Free (requires a paid subscription) Digital Music Service	Y	Y
	Tasty – Free Fantastic video recipes. Other great sources are Epicurious & Food Network.	Y	Y
	The Athletic – Free (requires \$9.99/mo. subscription) Sport Journal for die hard sports fans. North American coverage.	Y	Y

	App	iOS?	Android
	Tinybeans Baby Memory Book – Free (also subscription @ \$8/mo. or \$50/yr.) Highly rated family journal and photo album.	Y	Y
	Waze – Free Excellent route planner and GPS navigation. Alternative to Apple Maps, Google Maps, inRoute, etc.	Y	Y

*IAP = In App Purchase

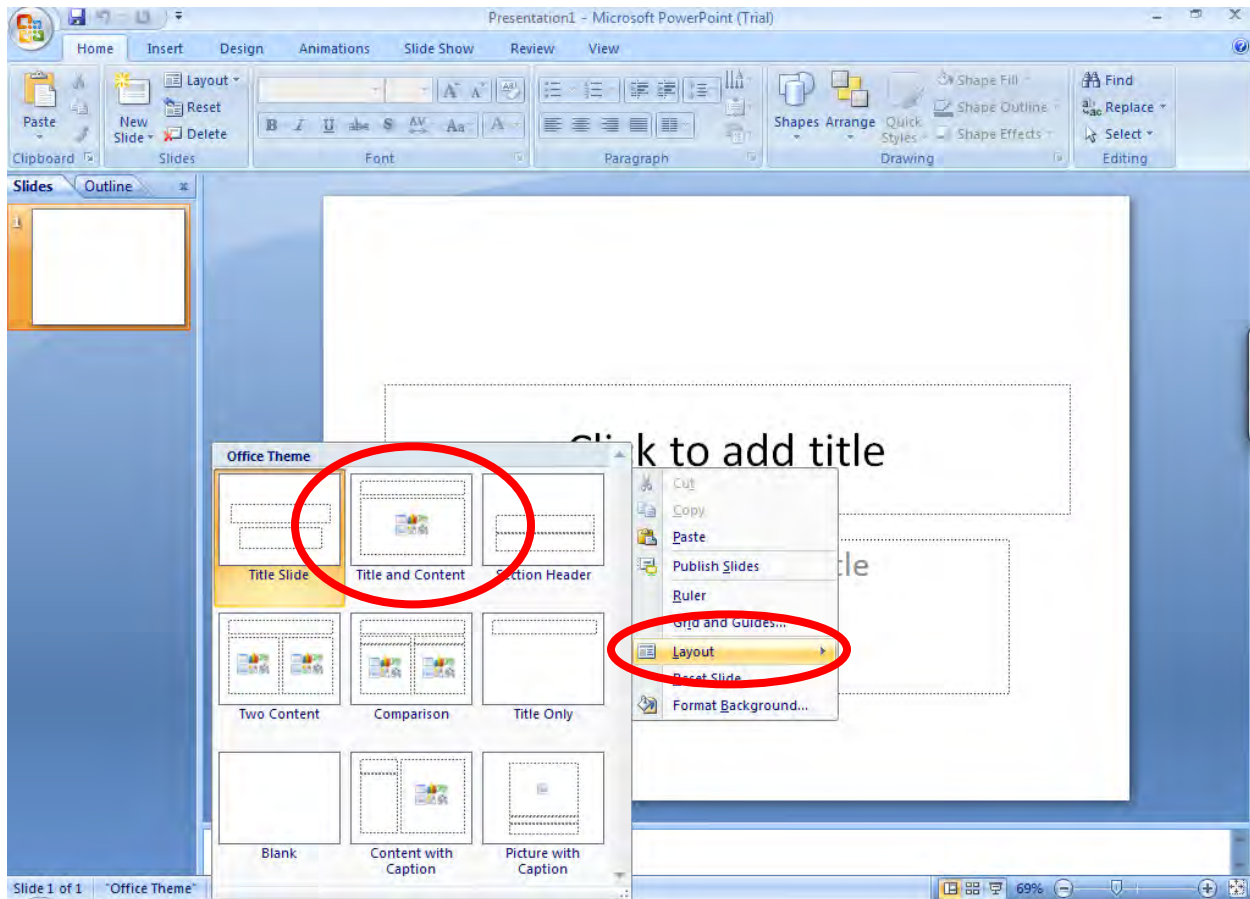
PowerPoint for Legal Professionals

Paul Unger, Esq.
punger@affinityconsulting.com

EXERCISE 1

Starting a Presentation – Creating a Title Slide

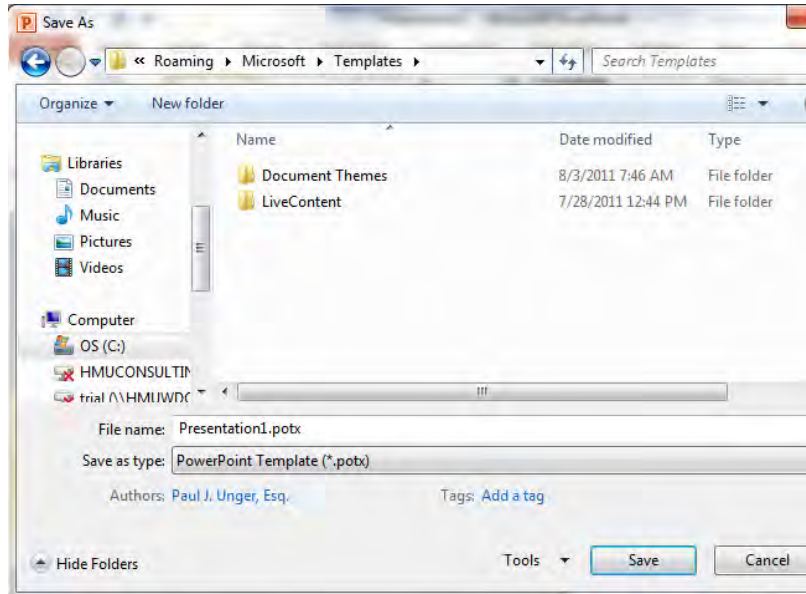
1. When PowerPoint starts, a brand new presentation opens with a blank first slide.



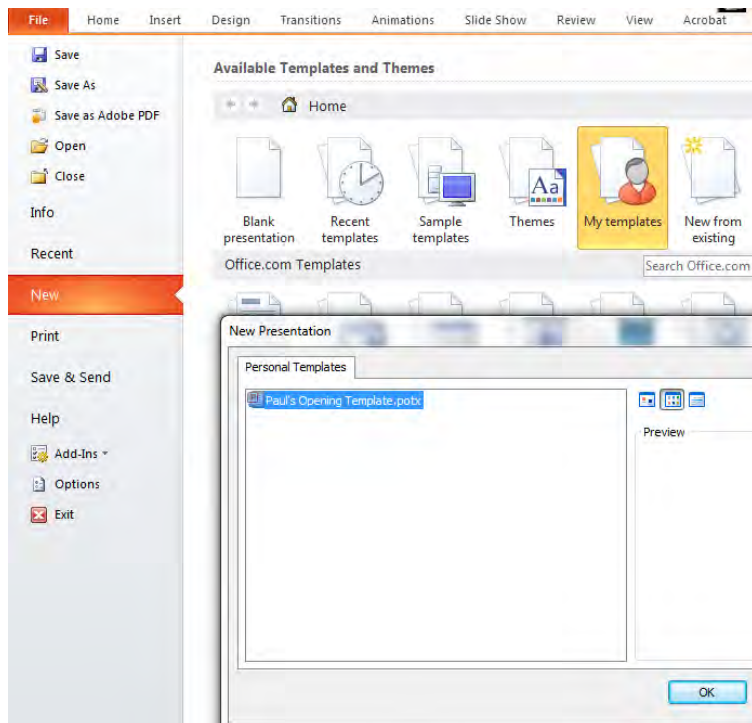
2. Right-click and select **Layout** and select the desired slide layout.
3. Click in the area that says “**Click to add title.**” Enter some text as a title for this presentation.
4. Click in the area that says “**Click to add subtitle.**” Enter some text as a subtitle for this presentation.
5. In the Ribbon above, select the **Design** tab. Here you can choose a pre-fab cliché run-of-the-mill boring background for your PowerPoint presentation.

Saving Presentation as a Template

1. Once you have formatted the color, font and created the desired graphical layout that you like, you may want to save it for later use. To do so, select **File** and **Save As** and then select PowerPoint Template (*.potx).



2. To access/use that template, select **File > New** and **My Templates**.



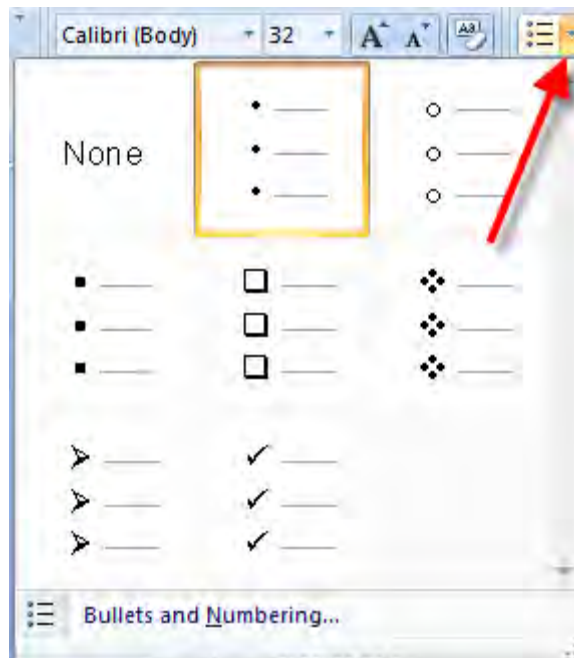
EXERCISE 2

Creating a Bullet Point Lists

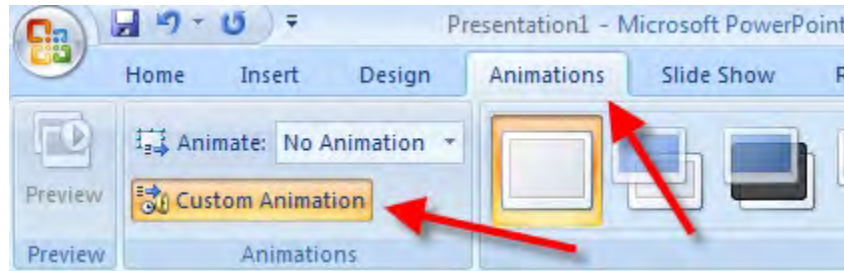
1. On the **Home** ribbon, select the **New Slide** button. Select **Title and Content**.



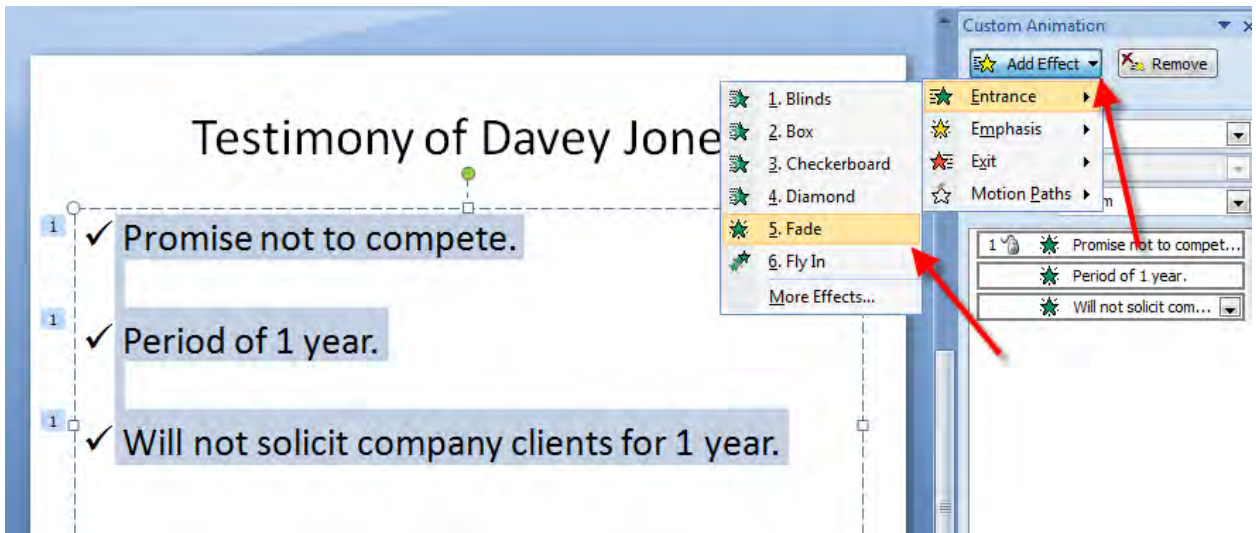
2. The new bullet list slide will be inserted as the second slide. Now click in the **Click to add title** area and add some text as the heading for the bullet list.
3. Click in the bulleted **Click to add text** field and add the first of your bullet points. Hit **Enter** to advance to the next line and add additional bullets.
4. To change the appearance of the bullets in the list, click and drag your mouse over the bullet points you have created to select the text. From the **Home** ribbon, click the drop-down menu from the bullet-point toolbar button and select the desired bullet style.



- To animate your bullet list so each one comes in one at a time, select the **Animation** ribbon and then **Custom Animation**. In 2010, the custom animation is found under the **Animation** ribbon and **Add Animation**.



- The Custom Animation task pane will appear on the far right hand side of the screen. Select the desired bullet points to animation as seen below.
- Next, select which kind of custom animation you would like for that bullet point from the **Add Effect** drop down menu on the far right hand task pane. Repeat for each bullet, if desired. In the future, it may best to animate the first bullet point and then when you hit **Enter** a new bullet point is created with the animation, so you do not have to animate each bullet separately.



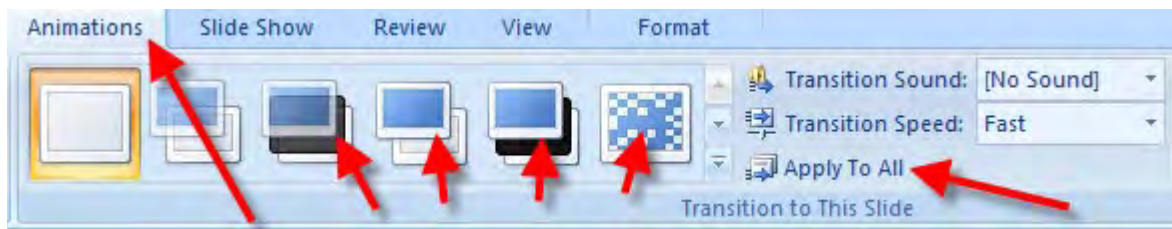
EXERCISE 3

Slide Transitions

To give your presentation a really cool feel, you can apply what is called a transition between slides. As an example, this could add a fading effect between slides. You also can add a checkerboard, sliding, and many other effects.

Select one of the buttons seen below (with the shorter red arrows) and then apply to the slide you are actively working on, or to all.. PowerPoint 2007 will show you a preview dynamically.

1. On the **Animation** ribbon, select the desired transition and click **Apply to All**.



In PowerPoint 2010, transitions is a dedicated Ribbon:



EXERCISE 4

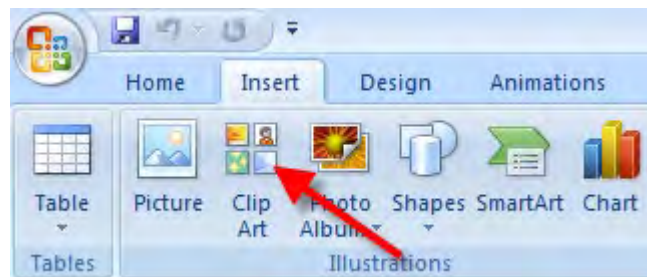
Inserting Clip Art & Photographs

Available Options

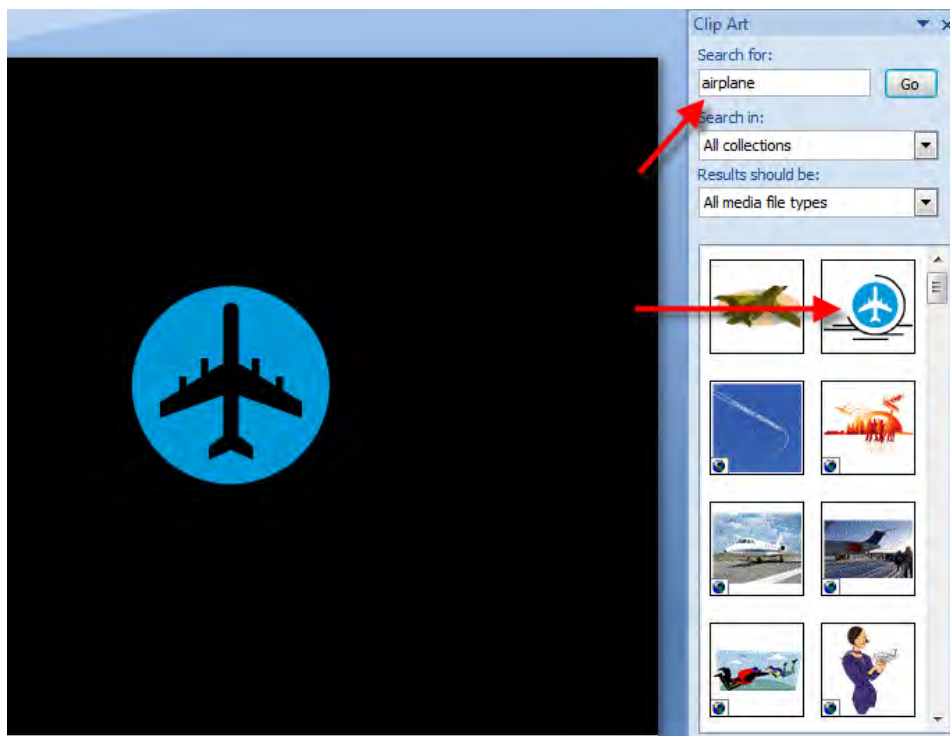
Various types of clip art and picture formats can be inserted into a PowerPoint slide. The most typical file type is the jpeg format. Clip art consists of pre-made graphics to use at any time. Pictures can be scanned images, photos from a digital camera, pictures downloaded from the web, or other sources.

Inserting

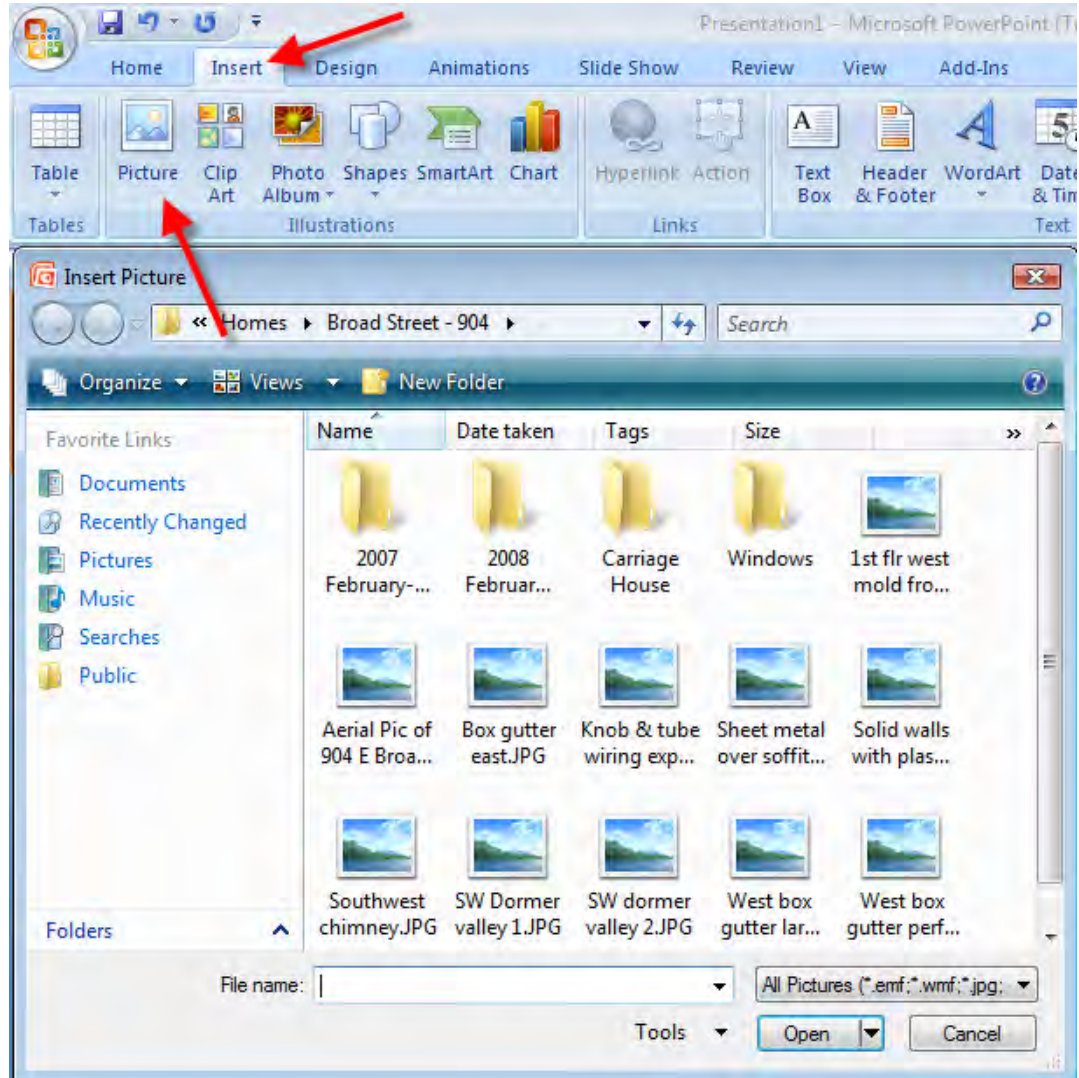
1. To insert clip art go to the **Insert** ribbon and click on the **Clip Art** toolbar button.



2. A task bar will come up on the right side which you can search for any clip art you would like to insert.



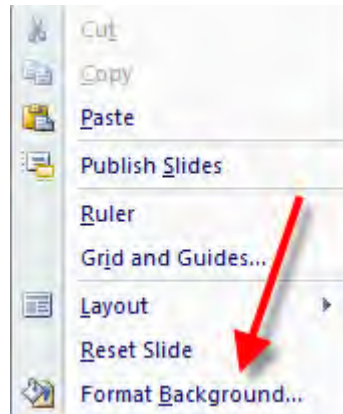
3. To insert a **Photograph** go to the **Insert** ribbon and click **Picture**. Browse to the location where the graphic file resides. You can either double-click on the file or select it and click **Open** at the bottom of the dialog box.



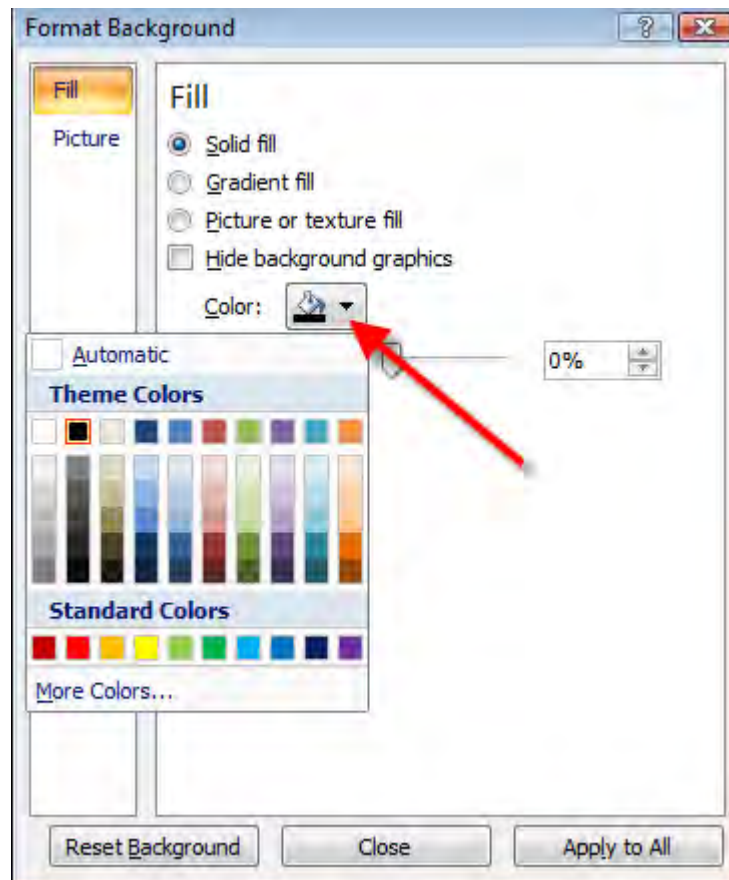
Changing your background slide color to Black

Often times, it is desirable to make the background color black when displaying photographs or clip art. White tends to be harder on the eyes and black just displays the image better most of the time.

1. Right-click on the background and select **Format Background**.



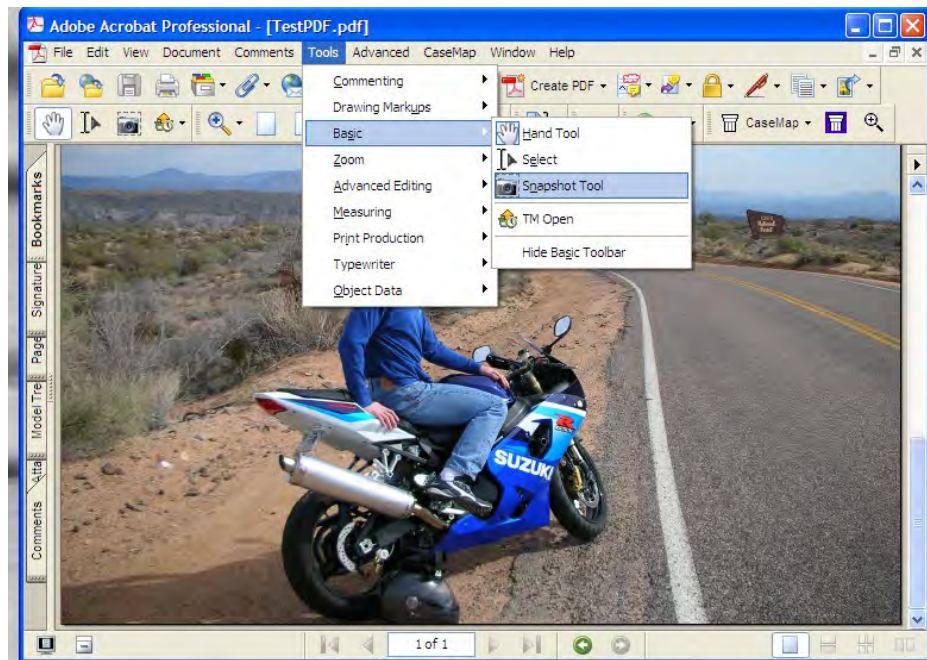
2. Select the desired color and click **Close** to apply the color to just that slide, or select **Apply to All** to apply to all slides.



Inserting PDF Images into PowerPoint

Inserting an image from a PDF is unfortunately not an option from within PowerPoint. A portable document format (PDF) is not a true graphic file. However, since many people have documents or images provided to them in PDF format, below are instructions for getting those PDFs, or parts of PDFs, into PowerPoint without having to re-scan the document or image.

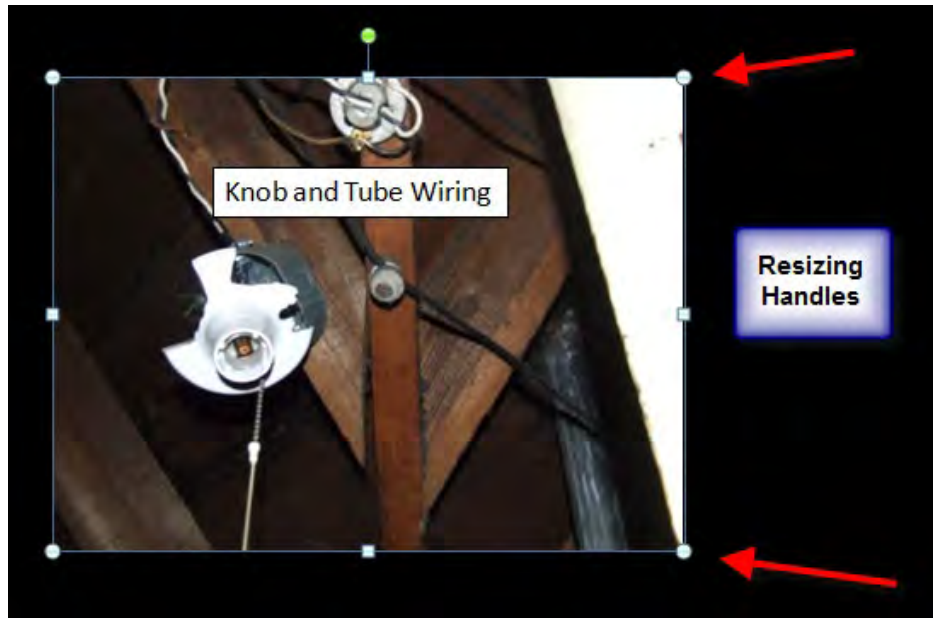
1. Open the PDF file in Acrobat.
2. Use the **Snapshot** tool in Acrobat (select the Snapshot toolbar button (the camera) or from the menu bar, select **Tools, Basic, Snapshot Tool**). Clicking on the image with the cross hairs selects the entire image. Dragging the cross hairs allows you to crop and select the image.



3. Adobe will prompt you to inform you that the image is saved to the Windows Clipboard. Select **OK**.
4. Return to PowerPoint and select Paste or Ctrl+V to paste the image into the desired slide.

Resizing Clip Art or Photographs

PowerPoint may insert the picture in a size that doesn't fit. Depending upon the resolution of the picture inserted, it may be too small or too large. Inserted pictures can be easily resized by using the same method as resizing Clip Art images. Use your mouse to click and drag the resizing handles. **Always use the corners to resize images** so you do not skew the image. The entire picture position on the slide can also be moved by clicking and dragging the image itself to another location on the slide.



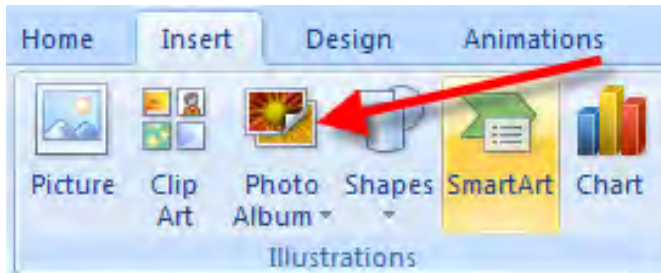
Adjusting the Quality of Photographs

You can adjust the quality of photographs by double-clicking on the photo and going to the **Format** tab and ribbon. You will see a group called **Adjust**. Here you can adjust the brightness, contrast and color. You can also decrease the size of your PowerPoint file by using the **Compress Pictures** function.

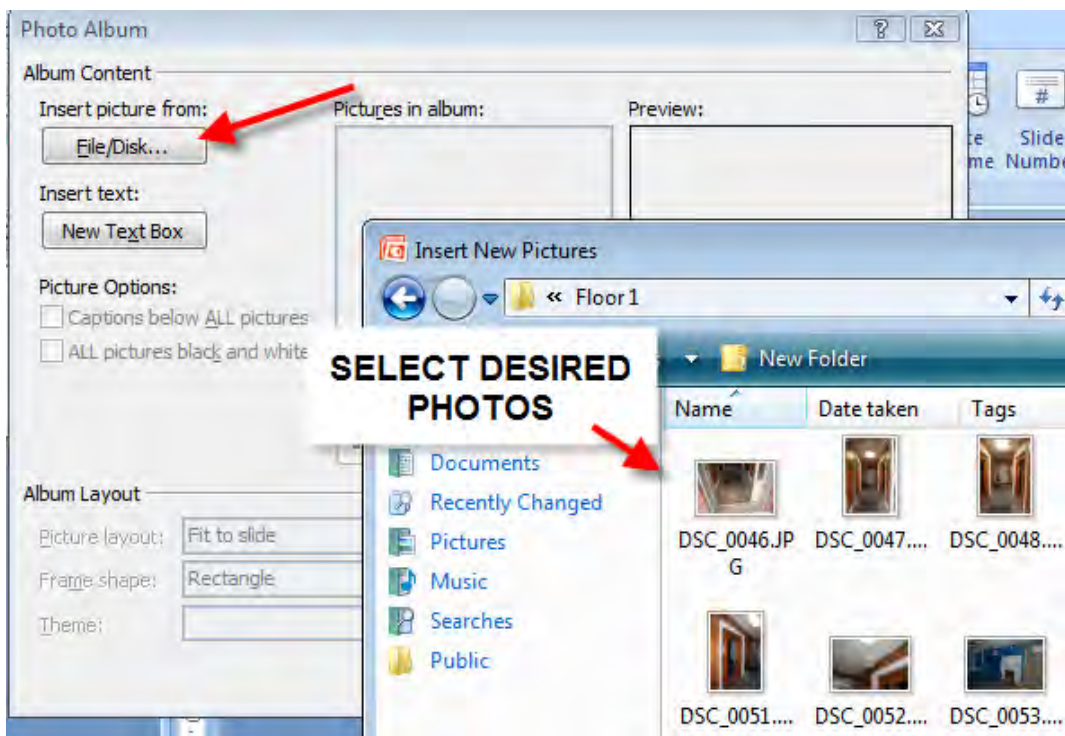


Inserting Large Numbers of Photos All-at-Once

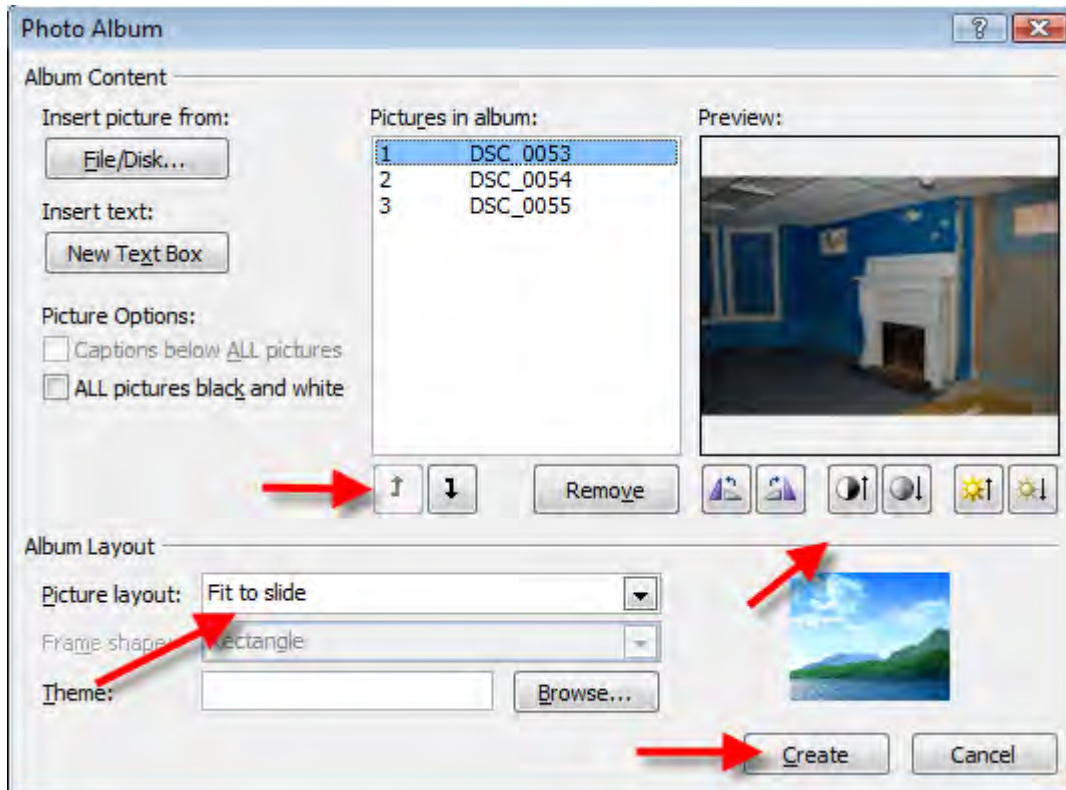
1. Open PowerPoint and select **Photo Album** from the **Insert** ribbon.



2. Select **File/Disk** and then browse to the location of your digital photographs. Select the desired photographs (TIP - CTRL-A will select all) and click **Insert**.



3. Here, you can re-order them, rotate, adjust brightness and contrast. Select **Fit to slide** in the **Picture Layout** field and then click **Create** to create the presentation.



4. If you want to use these slides within an already-existing PowerPoint show, save this one and exit. Note the location. Open your other PowerPoint file and from the **Home** ribbon, select **New Slide** and **Reuse Slides**. Browse out to the photo album that you just created and insert all or just the desired slides.

Inserting Labels, Captions using Text Boxes

1. Click on **Insert** ribbon and then the toolbar button called **Text Box**.



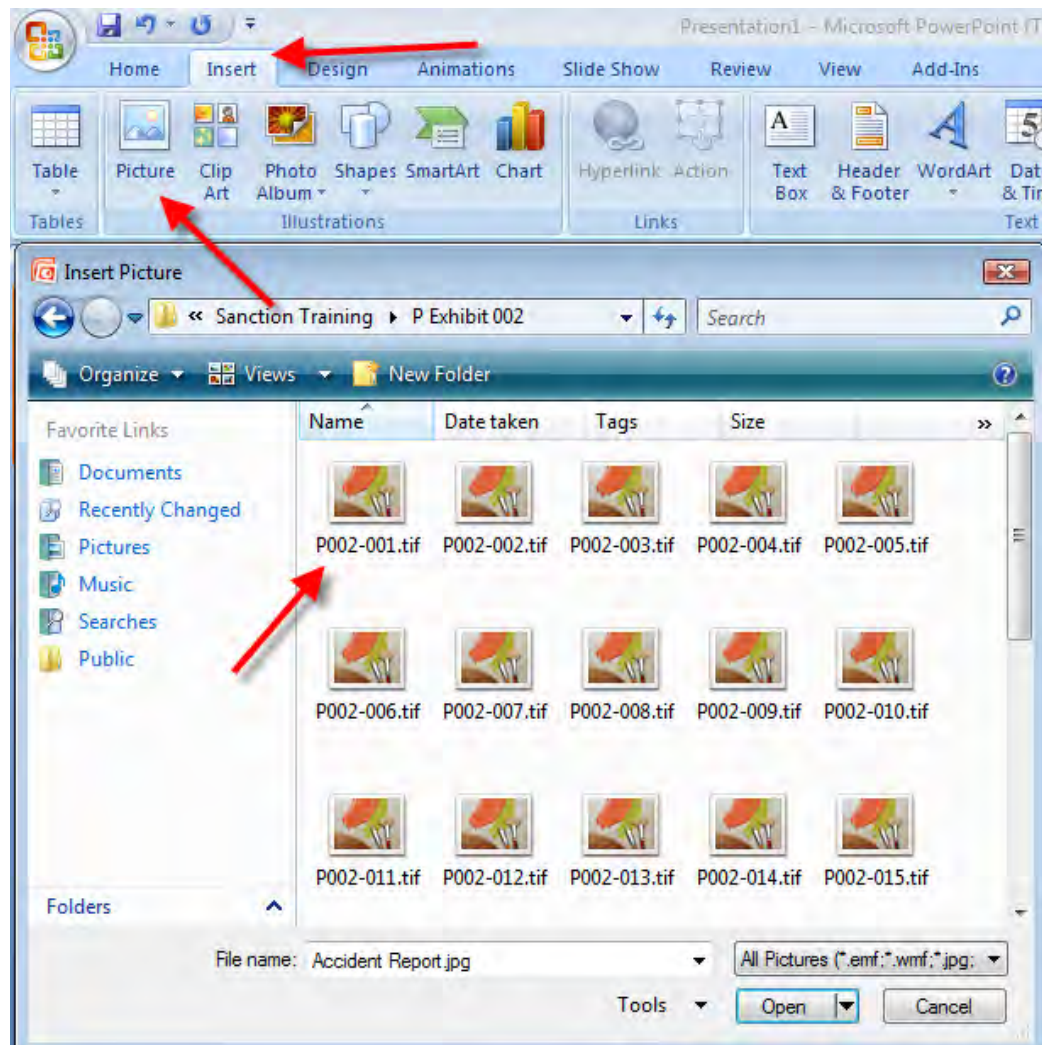
2. Move your cursor where you want to place the text box and left mouse click.
3. Type the desired text and format it appropriately (i.e., color, font and size).
4. Finally, drag (move) the box (like any other object) to its final placement so it looks nice.



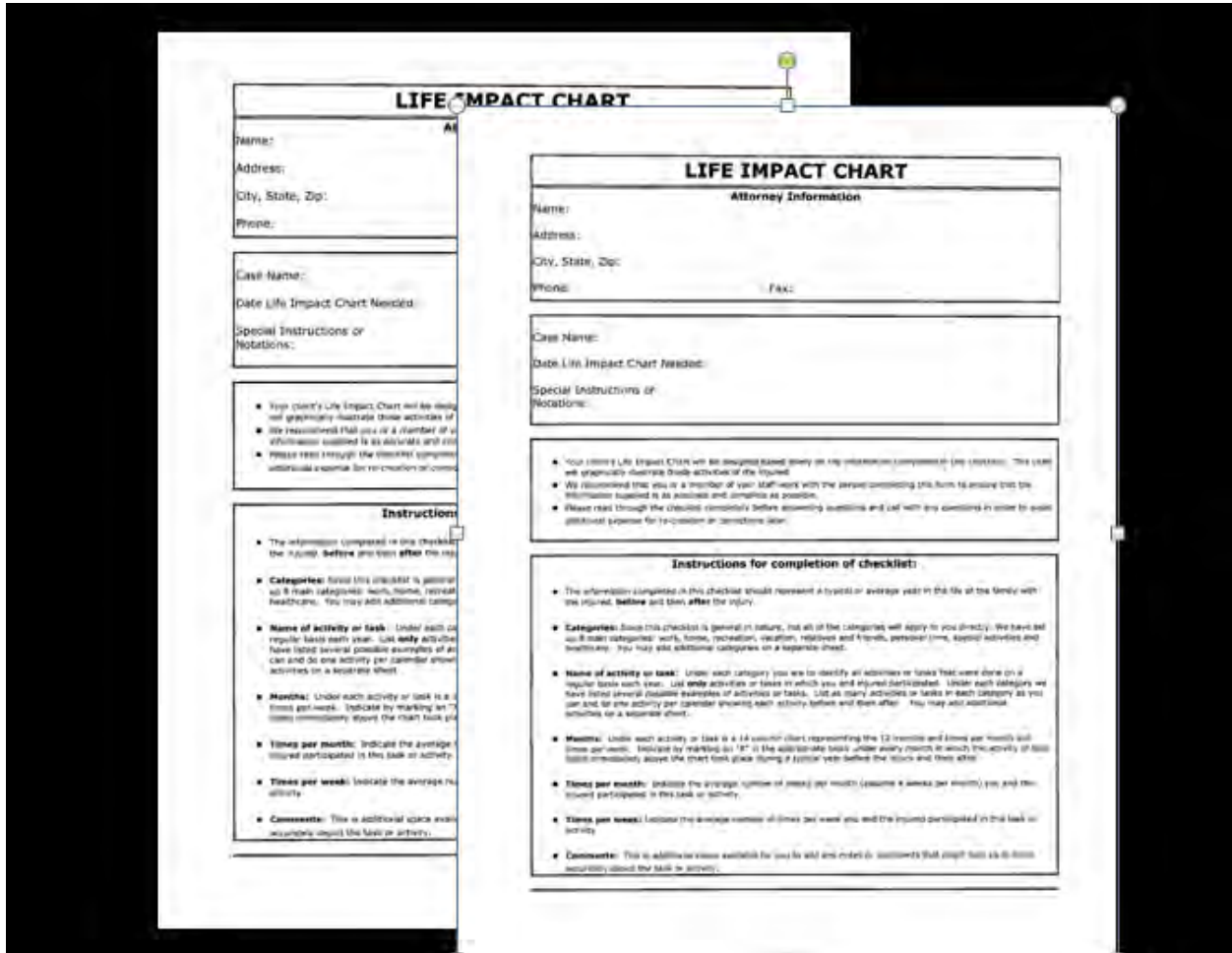
EXERCISE 5

Creating Document Callouts

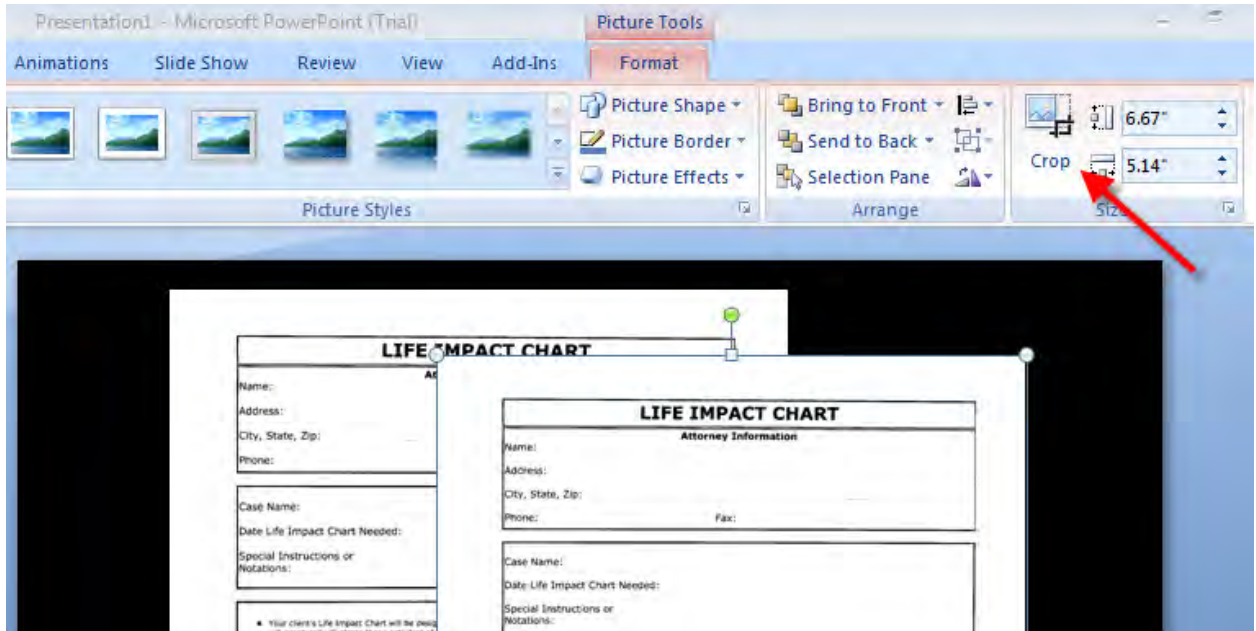
1. Scan the document that you would like to use and save it in as a TIF.
2. As we did earlier, go to the **Insert** ribbon and click **Picture**. Browse to the location where the document, saved as a TIF, resides. You can either double-click on the file or select it and click **Open** at the bottom of the dialog box.



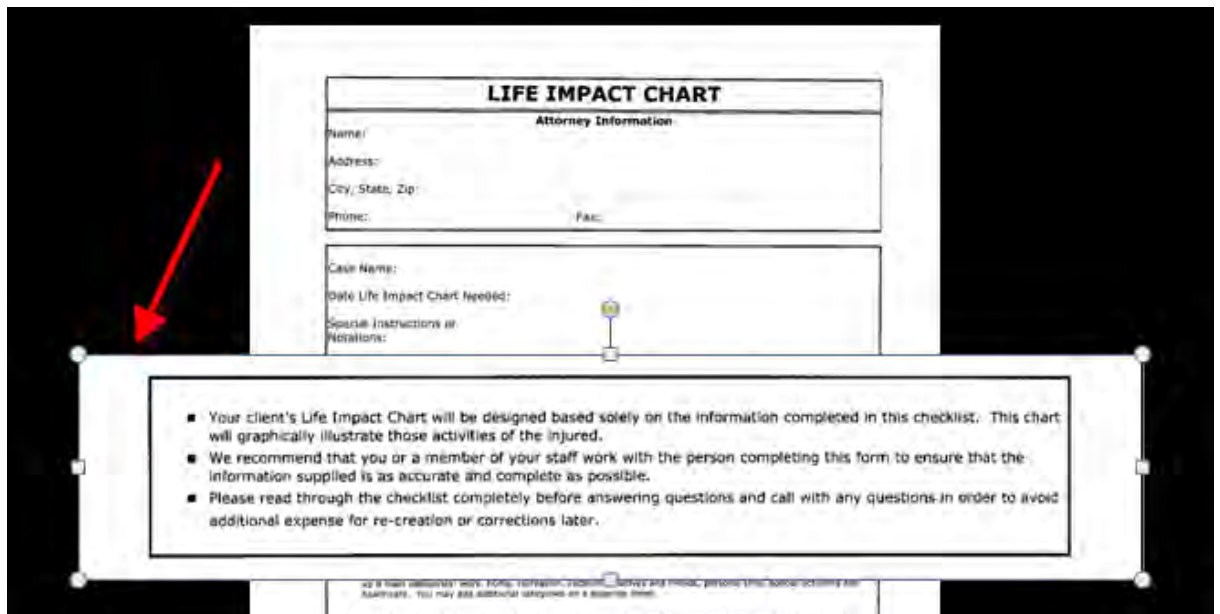
- The document will appear. Resize it so it fits on the page and duplicate it by clicking on it, copying it, and pasting it so there are two of the same objects on the slide.



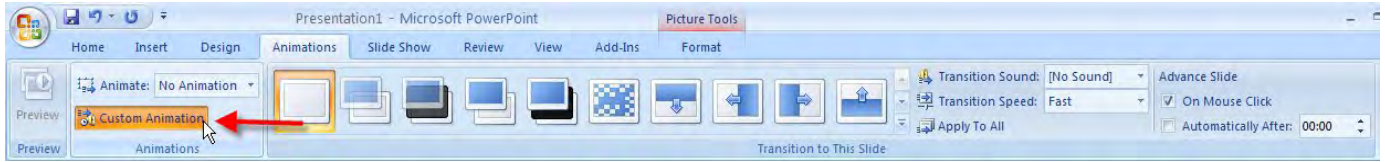
4. Double-click on one of the images to get the crop tool to appear from the Drawing Toolbar. Create the “Callout” by cropping the copy using the **crop tool**.



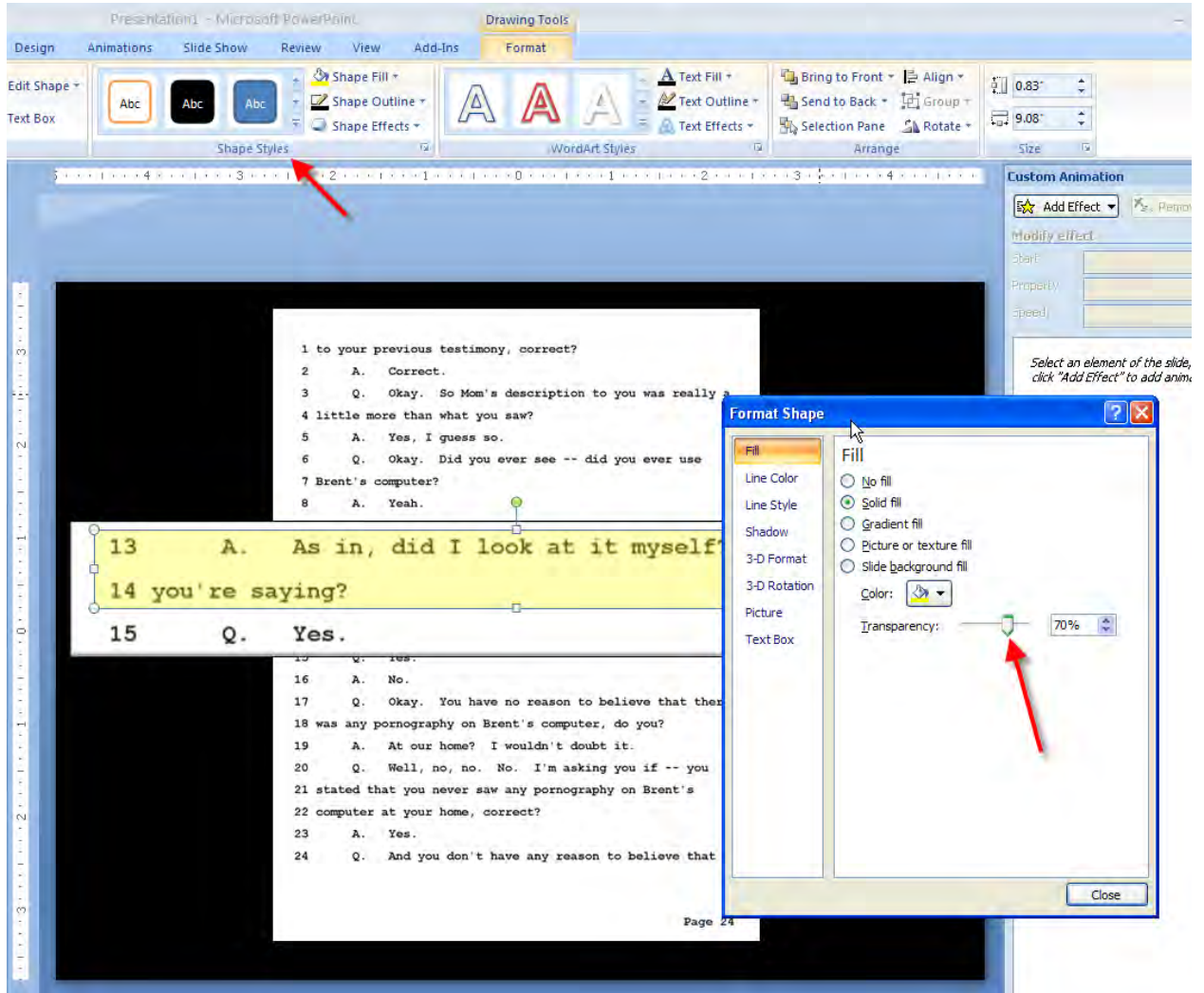
5. After you have cropped the callout, you can resize it (making it larger) just like we did previously with the picture.



6. You can animate the objects from the **Animation** ribbon by going to **Custom Animations** or **Add Animation** button and choosing an entrance effect for each object.



7. If you want you can also add a highlight with a transparent box. You must double click on the box after you have created the size of box you wish to have, then make it yellow (or any color that you wish to make it). Make it as transparent as you like using the scrolling bar.



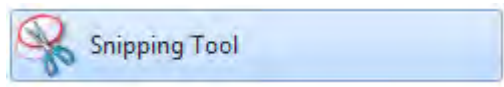
Alternative Highlighting Method for Documents

To achieve high-quality highlighting, it is best to bring the callout into a photo-editing program like **Photoshop** or **Photoshop Elements**, perform the crop and highlighting, and then save it as a separate JPG to be inserted. This takes significantly longer than the above-procedure, but it provides an excellent result.

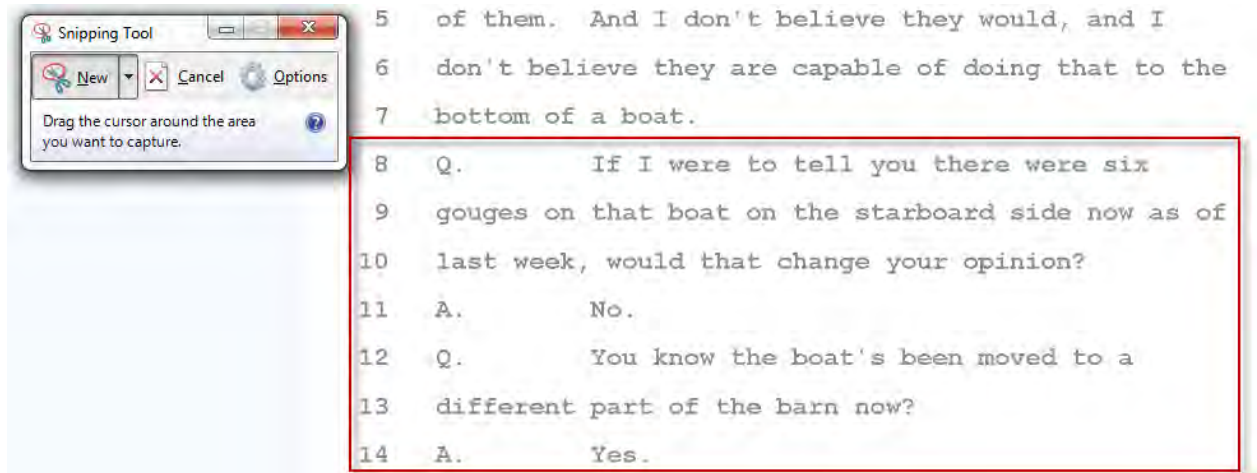
An alternative purchasing a program like Photoshop or Photoshop Elements is using the **Snipping Tool** which is part of Windows Vista or Windows 7.

To create a crop and highlight using the Snipping Tool:

1. Open the document (as a TIF, PDF, JPG, whatever format) that you want to crop and highlight so that it is displayed largely on your screen.
2. Start the Snipping Tool in Windows 7 or Vista.



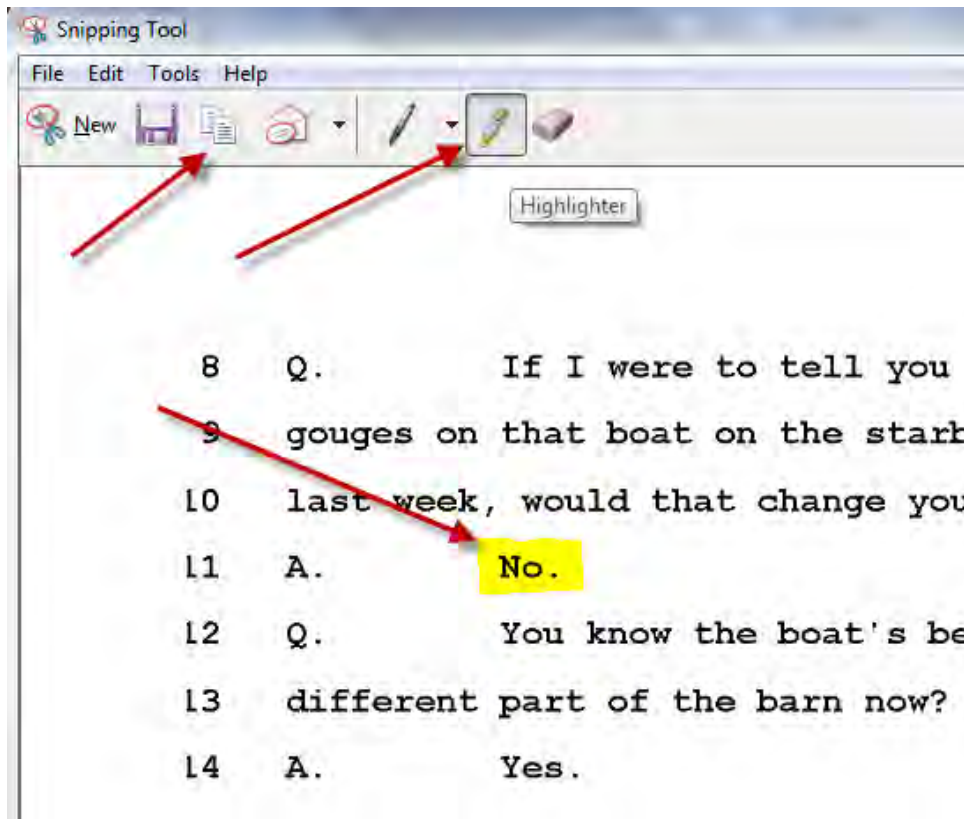
3. Draw a box around the area of the document that you would like to callout.



Other Alternatives:

- If working with a text-searchable PDF, apply the highlighting and then use the **Snapshot** tool.
- If you have Sanction or Trial Director, you could apply highlighting in Presentation Mode and then save the image. Browse to the saved location and then insert it into PowerPoint.

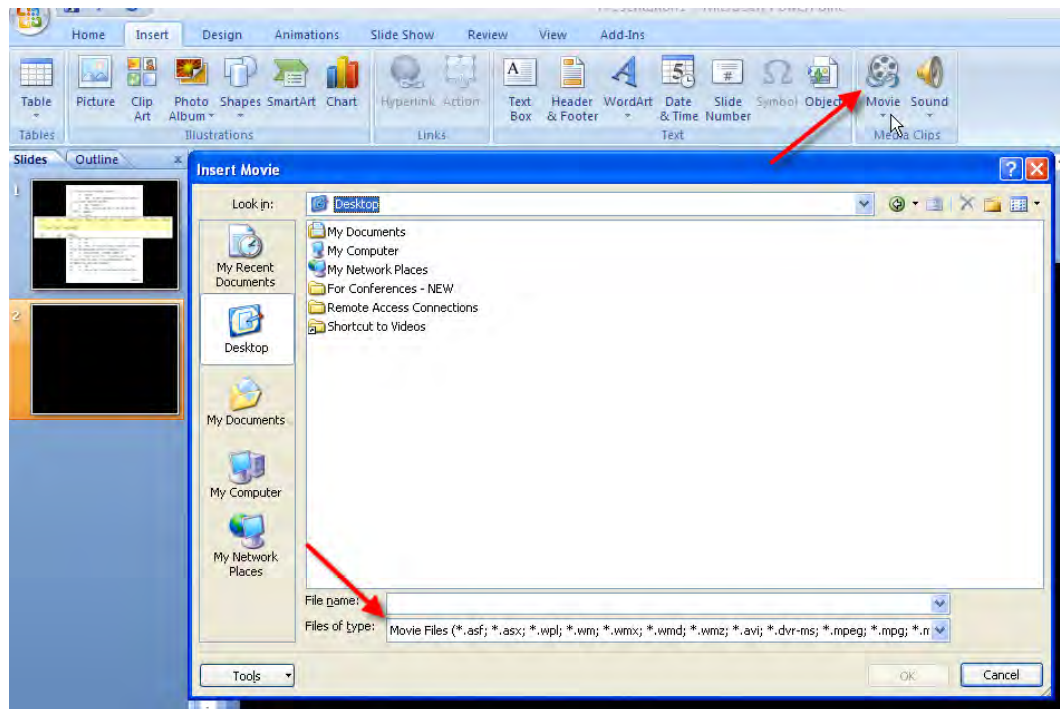
- Using the **Highlighter** tool, highlight the desired area. Then click on the **Copy** button (this will copy the image into the Windows Clipboard). In PowerPoint, **Paste** the image into the desired PowerPoint slide and then apply an animation to the inserted image.



EXERCISE 6

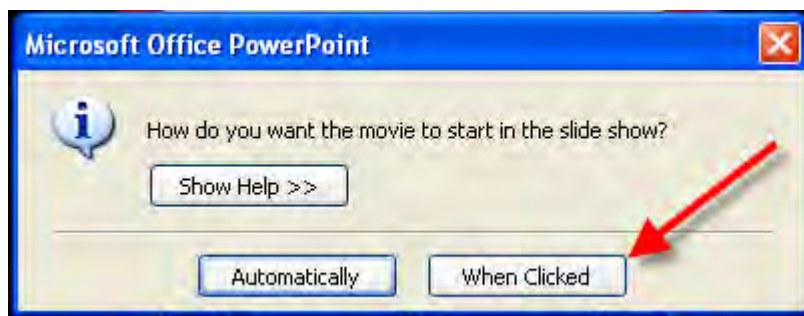
Inserting Video Clips

1. From the **Insert** ribbon select **Movie**. Browse to the location of the movie file, select it and click **OK**.



The most common formats will be mpeg, or avi.

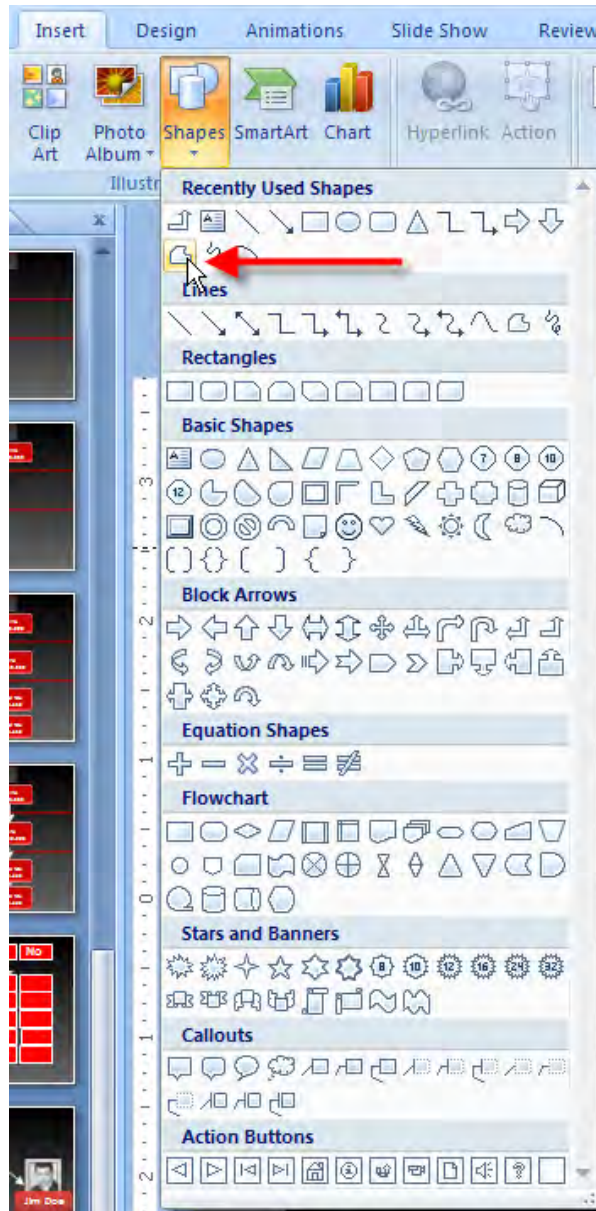
After choosing the video you choose to insert you will get this message. Most every time you will want to choose **When Clicked** (you don't want it to start playing automatically when the slide appears ... you may not be ready in the middle of your presentation).



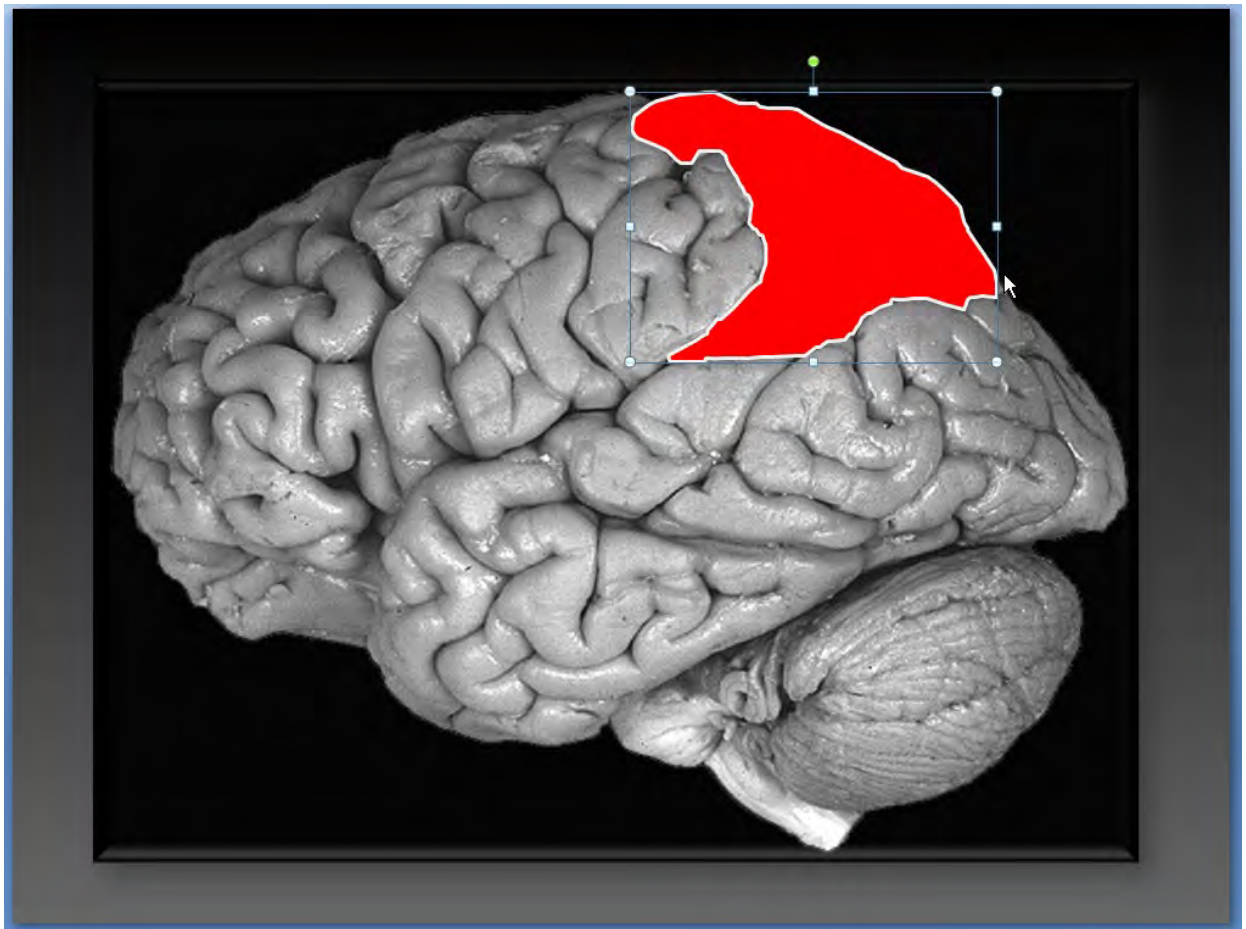
EXERCISE 7

Using Color & Animation to Fill Objects

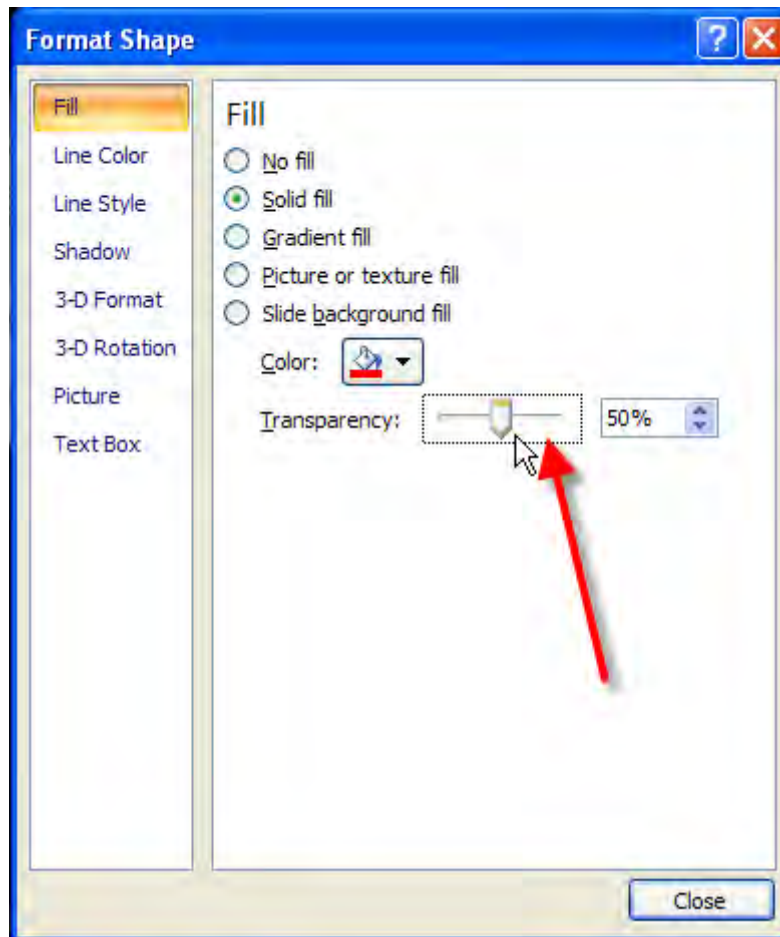
1. Insert a graphic file into your slide (**Insert** ribbon and **Picture**).
2. Select **Shapes**, then **Lines**, and **Free Form**.



3. Draw the area that you want to fill with color using your mouse and left-clicking around the shape.



4. Right-click on the drawn object and select **Format Shape**.
 - a. Select the desired color in the **Fill** selection.
 - b. Adjust the transparency to 40-60%.
 - c. Select **No Line** in the **Line, Color** section.



5. Repeat steps 3 and 4 as needed to fill in any other color in the diagram.

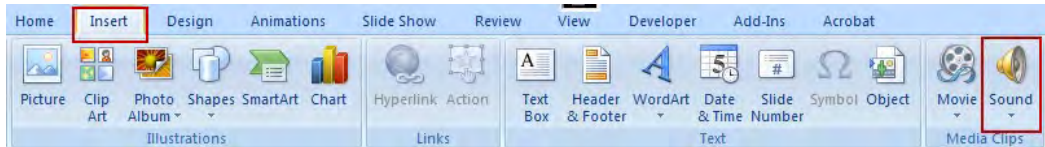
6. Select the first colored object that you would like to animate. Add and animation such as **Wedge** or **Fade**. Repeat for each area that needs to be introduced.



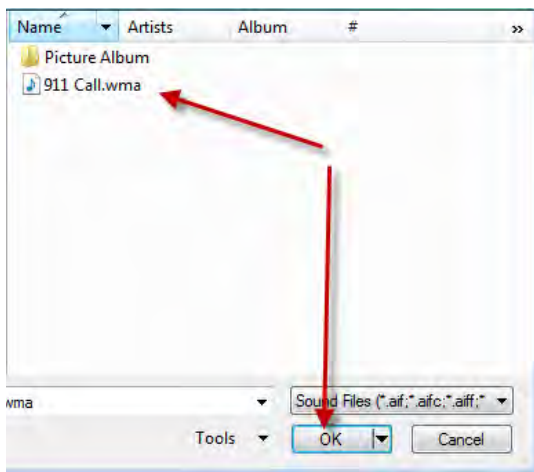
EXERCISE 8

Inserting Sound Files

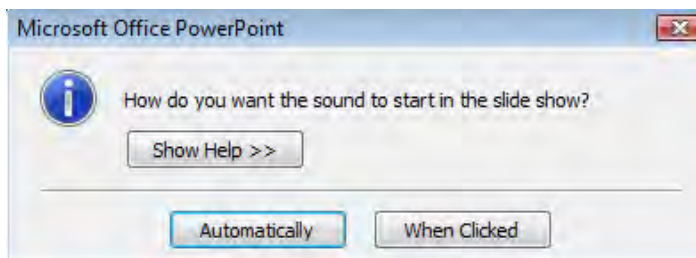
1. Go to the **Insert** ribbon and select the **Sound** button.



2. The most common formats are mp3, mpa, or wav. You will have to convert your sound file to those formats if you have a 911 call or a recorded message that you would like to play back. You can use a program like Cakewalk Pyro (www.cakewalk.com) to convert an analog tape to digital.
3. Locate the file and selecting the desired sound file and clicking **OK**.



4. You will get the message once again about whether you want to automatically play or when clicked. Most every time you will want to choose **When Clicked**.

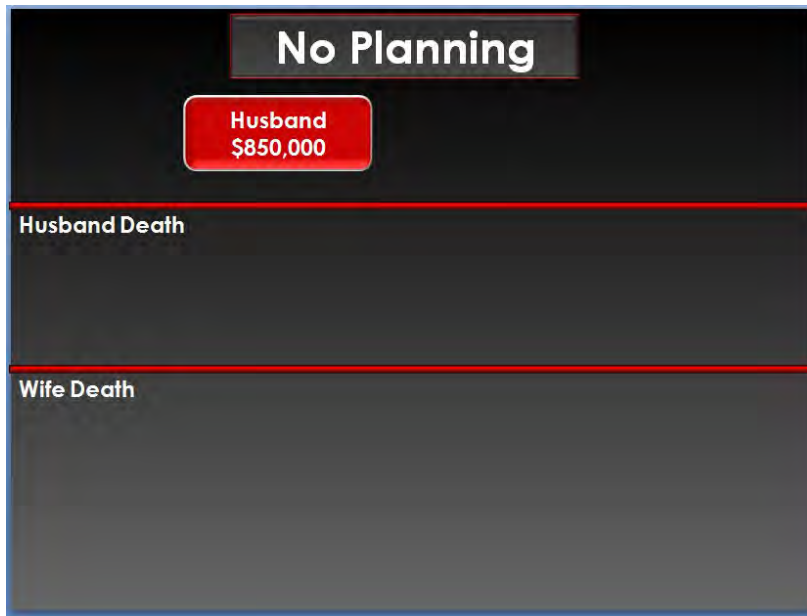


5. After inserting the sound file you may want to add a picture, a label or an appropriate background.

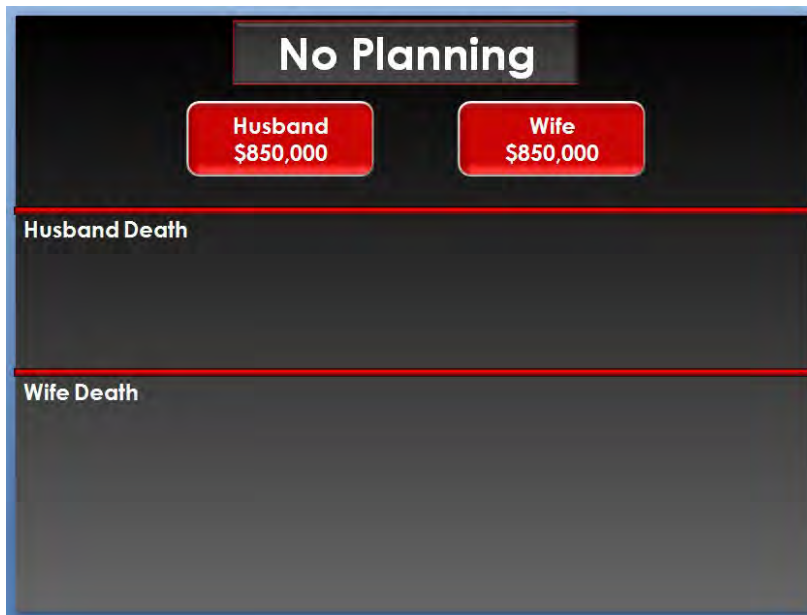
EXERCISE 9

Flow Charts

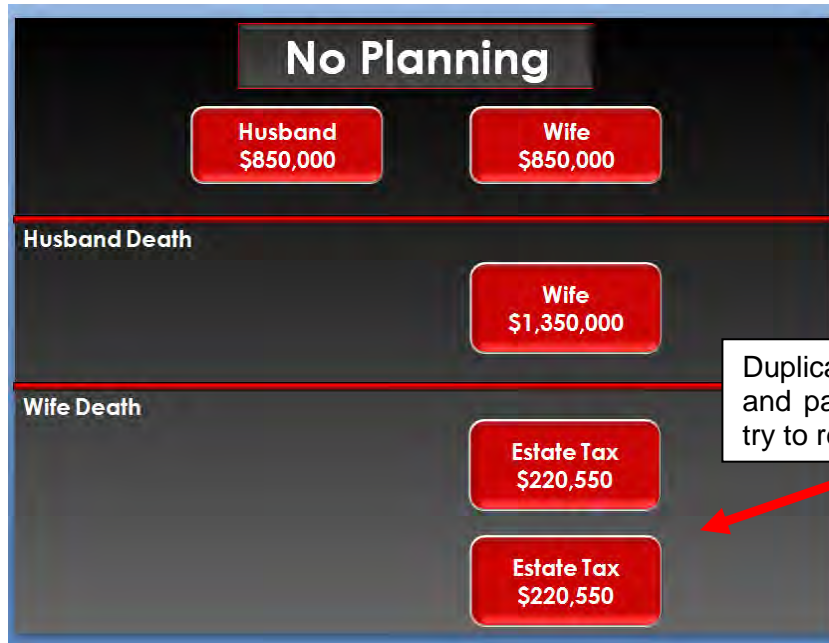
1. Drop in a rectangle or any other **Shape** from the **Insert** ribbon. Type the desired text inside the rectangle and format the text appropriately.



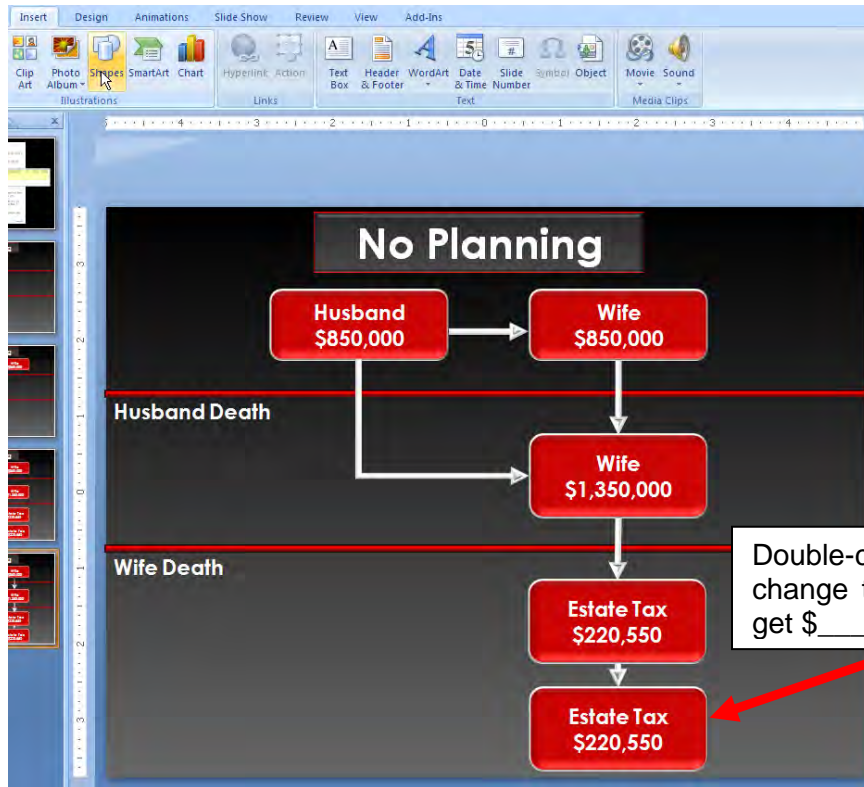
2. Take that rectangle and duplicate it (copy and paste).



3. Layout all of the objects and information you would like in your flow chart with the duplication of the boxes, lines and other objects. Click inside the objects to modify the text as desired.



4. Next, create the arrows you would like from the **Insert** ribbon and select the **Shapes** button and find the arrows.



Direction for Animation

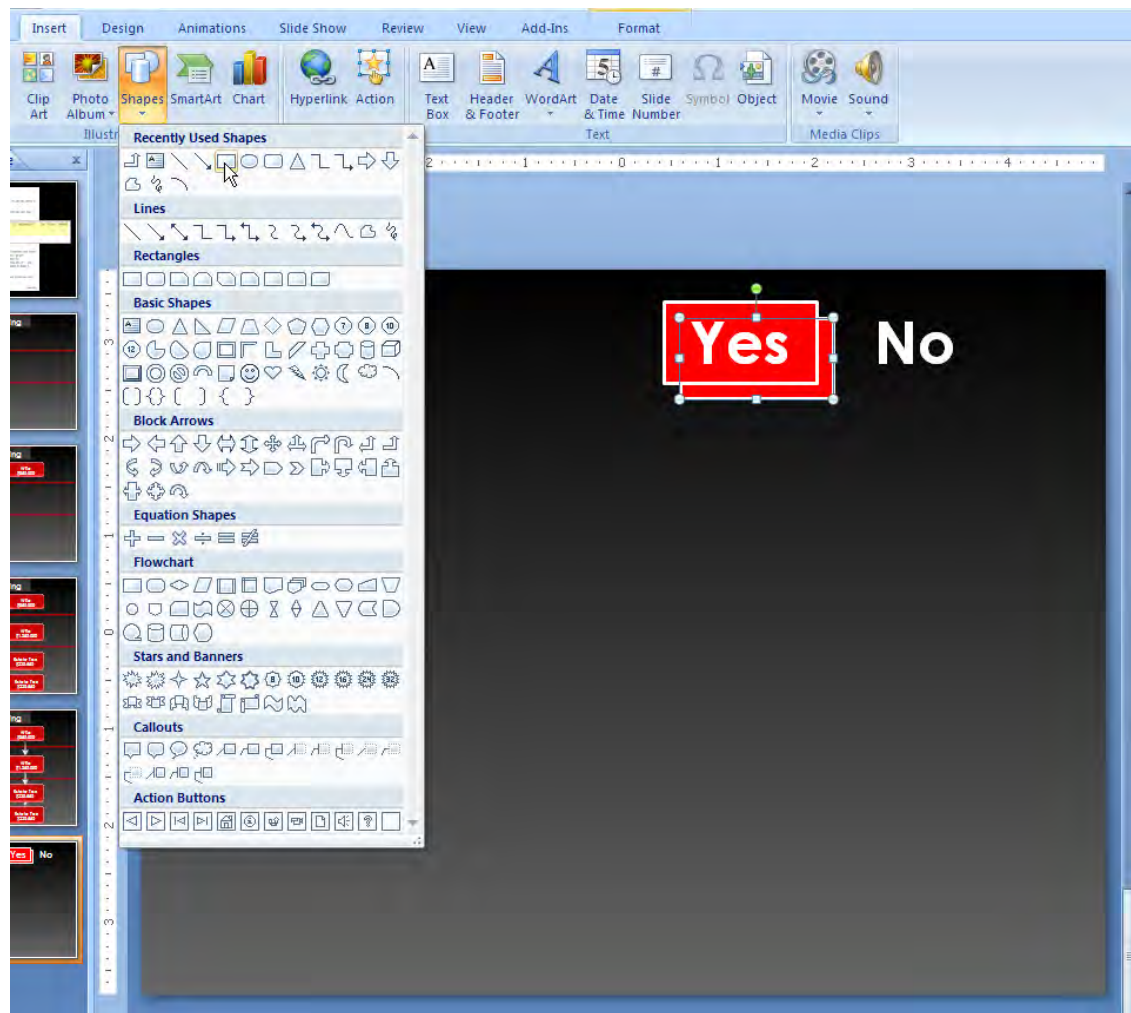
1. Go to the **Animation** ribbon and select **Custom Animation**.
2. Select first box (object) and select **Dissolve in** under **Entrance** category.
3. Next select first long arrow, and select **Strips** and then **Left Down** in the **Direction** drop-down menu.
4. Now choose then next object to animate and repeat the process throughout.

TIP: If you animate the first object when you first start the slide, and you duplicate the objects (copy and paste), the animation will duplicate as well and can save you a good bit of time instead of having to animate each object at the end.

EXERCISE 10

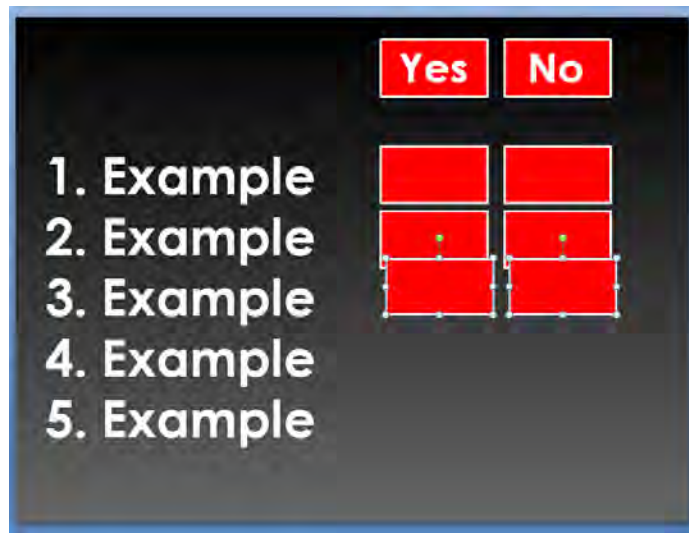
Creating a Checklist

1. Create two text boxes, one yes, one no (or whatever the categories you may need for your checklist).
2. Create a border around the text box and select a fill color by right-clicking on the text box and selecting **format shape**.

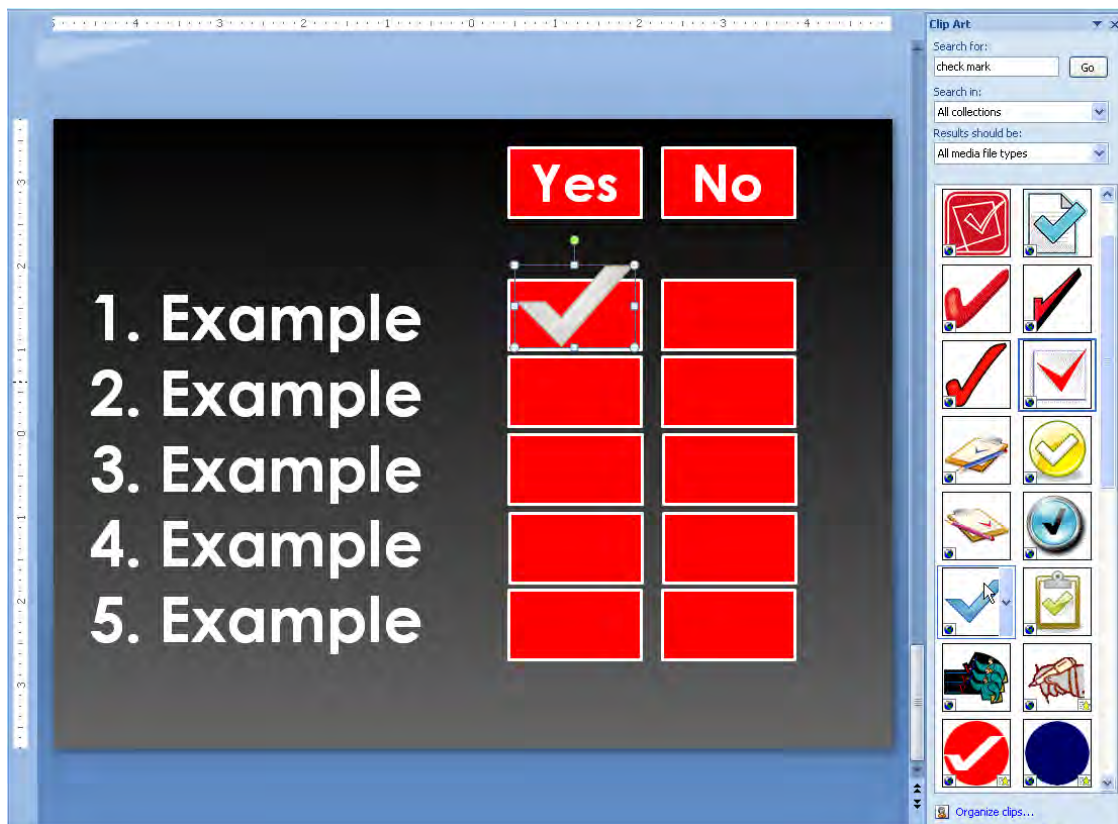


3. Create the categories that will go on the left. For this, create one large text box and type your categories.

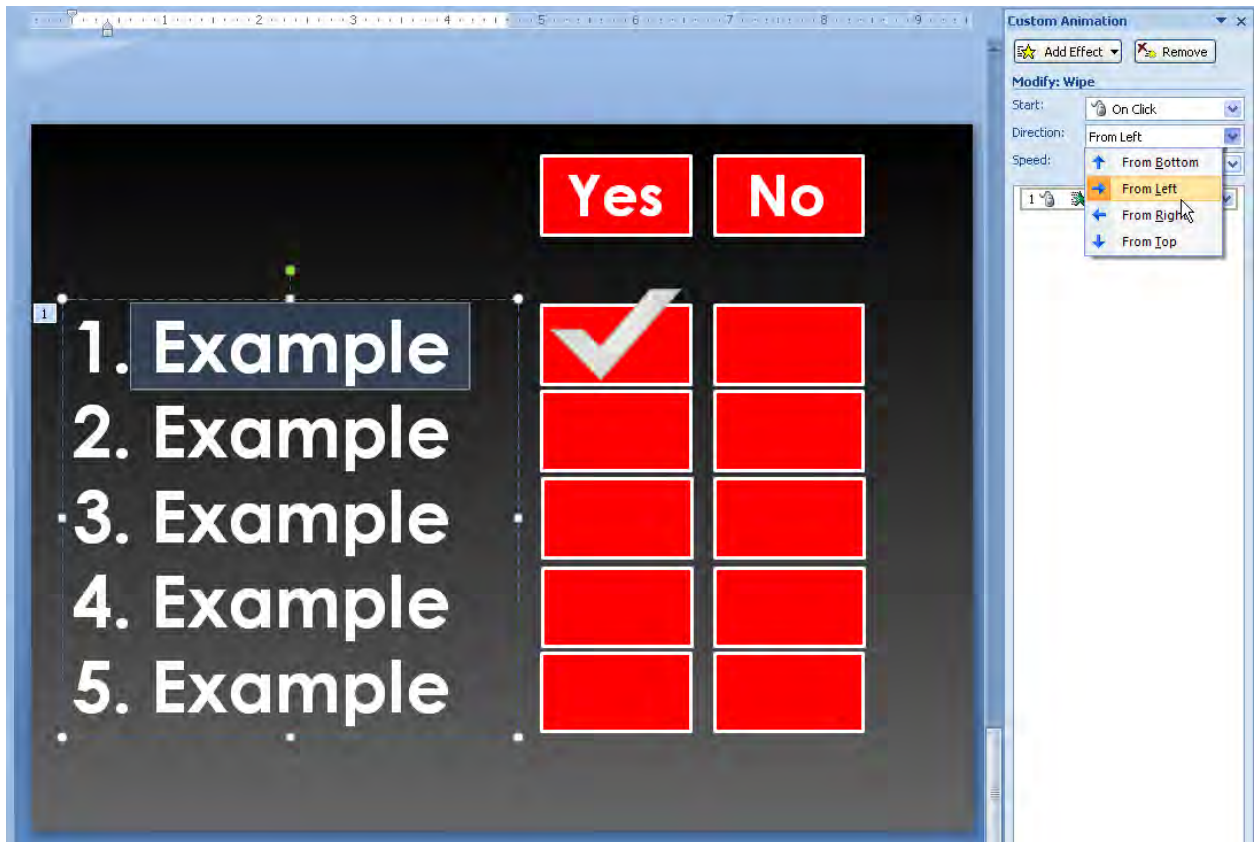
4. Create your rows of boxes under the YES, NO by copying the boxes you have already created.



5. After you lay out all of the boxes where you would like them, you can put in the checks that you would like in your checklist. Go to the **Insert** ribbon and select **Clip Art**. If you type “check mark” in the search field, many options will appear. You can select the one you want and place it into the boxes.



6. Place that check mark anywhere you would like. Simply copy and paste the check in all the other boxes that you would like.
7. After you have all the check marks and the categories in the places you would like them, start custom animating them. Select each category, and select the coinciding check mark and use the wipe left animation.

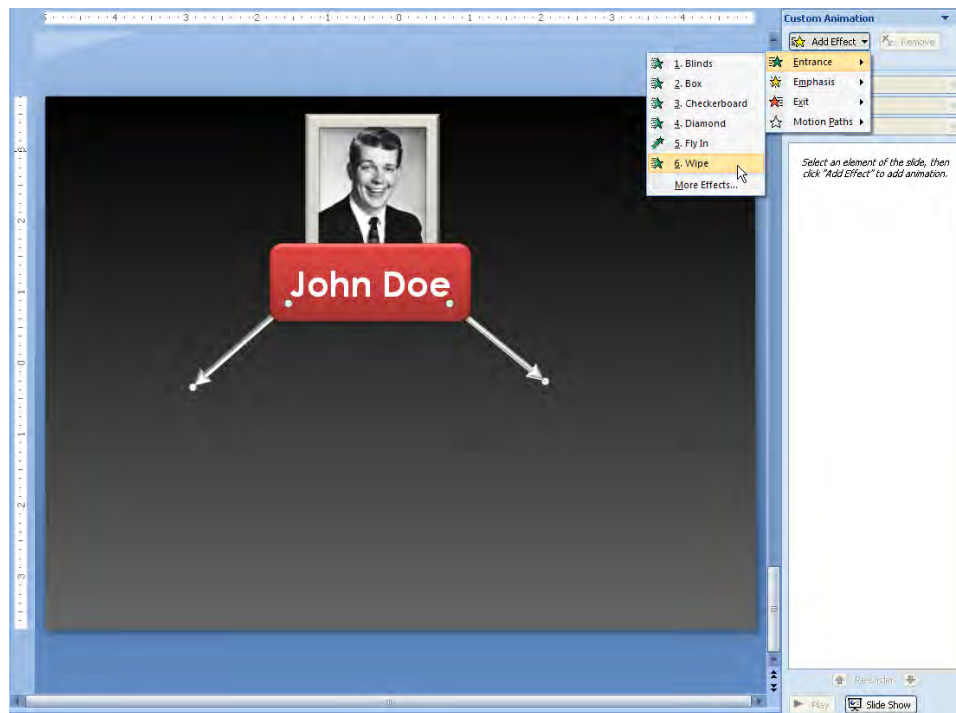


8. Repeat as necessary.

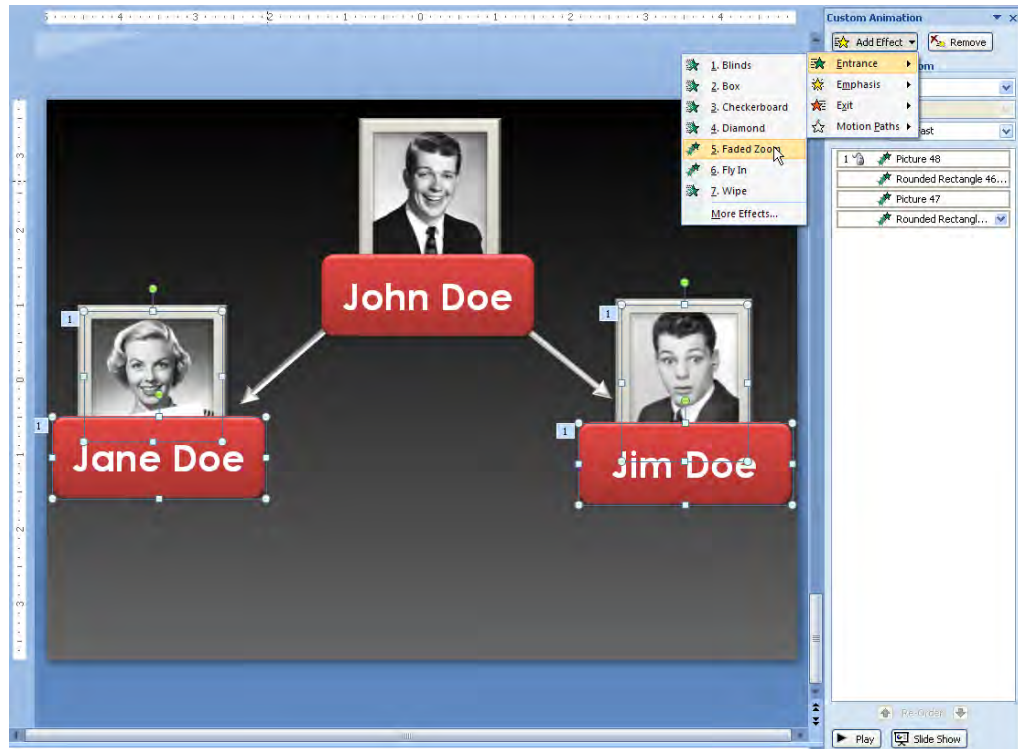
EXERCISE 11

Creating an Animated Family Tree or Organizational Chart

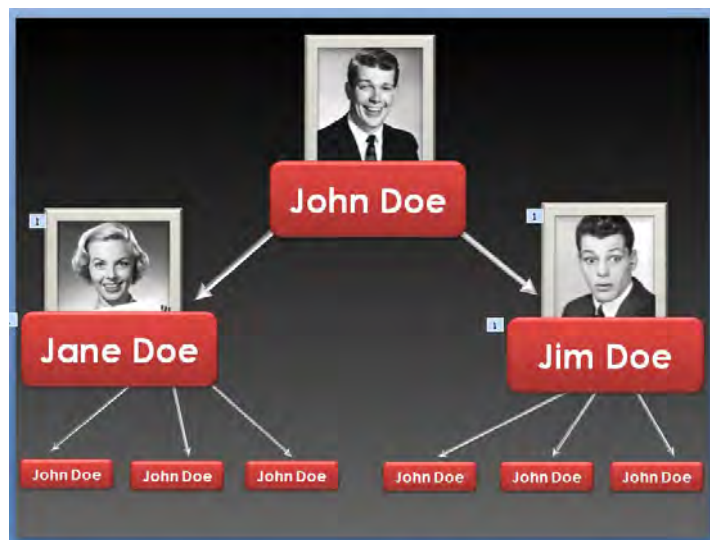
1. When creating this type of chart, always start with the top person in the chart. Type out the name, and insert his/her picture if you have it.
2. Next, drop in the arrows to go to the next people in line. Create the arrows as desired and then select them to apply animation to them. Go to custom animation, select **entrance** and choose **wipe** – then **down**.



3. Create the next two or however many people you have on the next level, the same way you created the first one. This time, for purposes of this exercise, apply the custom animation on both of the new items. Select both at the same time and select custom animation – **entrance** – **faded zoom**.



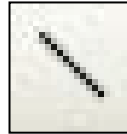
4. Finish it out by creating your final arrows and your final names the same way you did the previous ones.



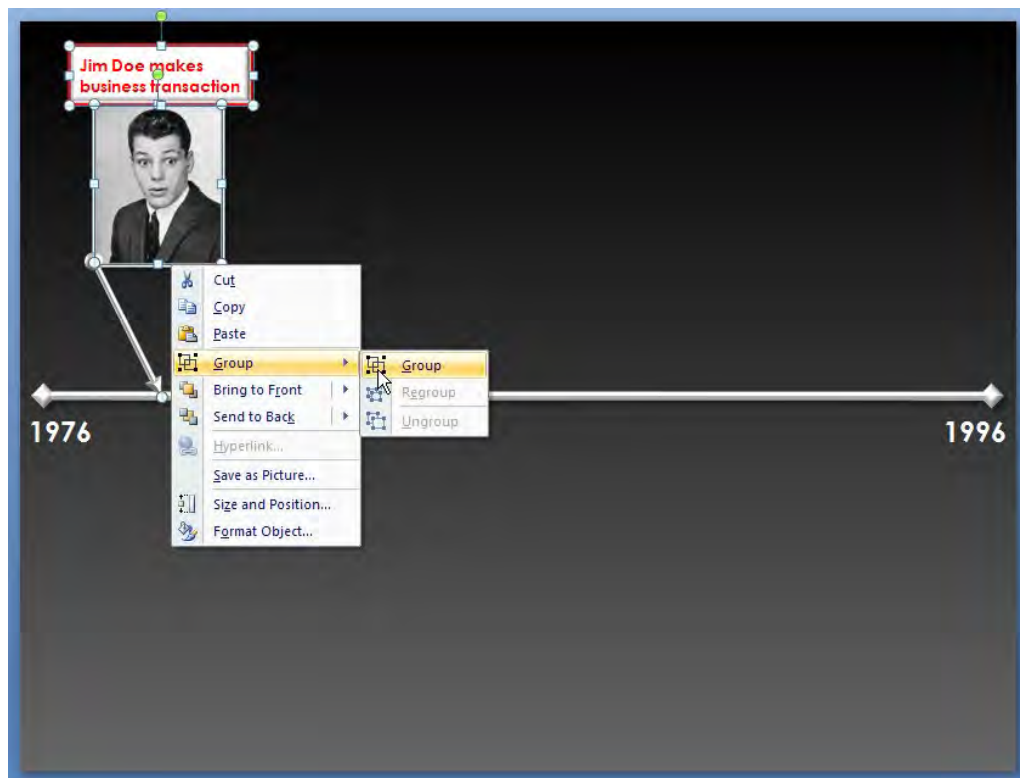
EXERCISE 12

Creating a Timeline

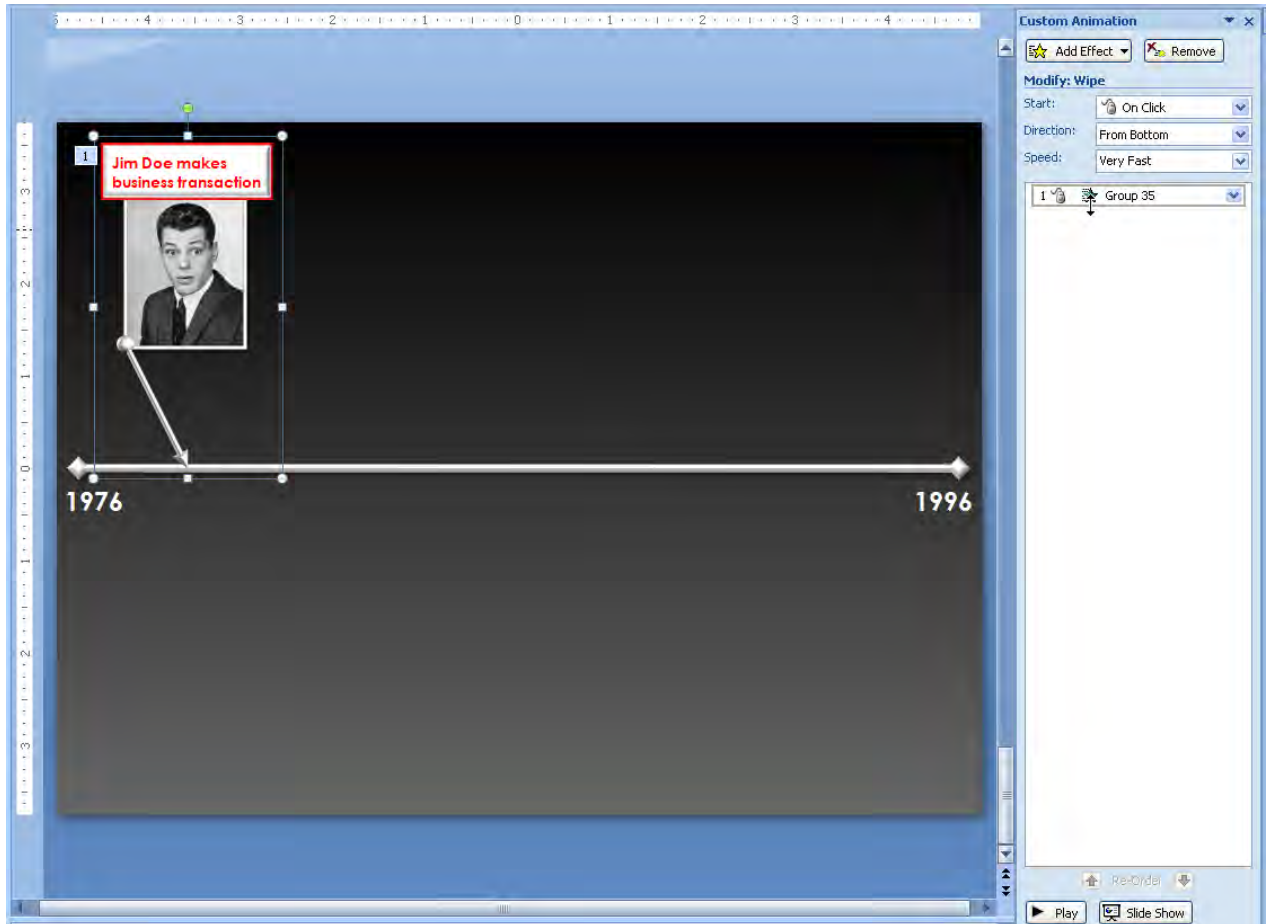
1. To create a timeline, create line across the slide and label the start and end date using text boxes. To create a line, go to the **Insert** ribbon and the **Shapes** button – and select the **line** button, and drag it across the screen.



2. Choose the dates that you want to create and type them into each of their own text boxes and place them appropriately on the timeline.
3. If you want to pop up pictures or documents on those dates or even just comments on those dates, you can make a line going from the timeline and connect it to the document, picture or comment.
4. After you do this, group the objects together, so when they pop up they all pop up simultaneously. To group you can select all of the objects by holding down the **Shift** key and left-clicking on the objects. Then right-click on one of the selected objects and select **grouping** and select **group**.



5. Use an animation (entrance - wipe up) on the group.
6. Repeat as necessary.



EXERCISE 13

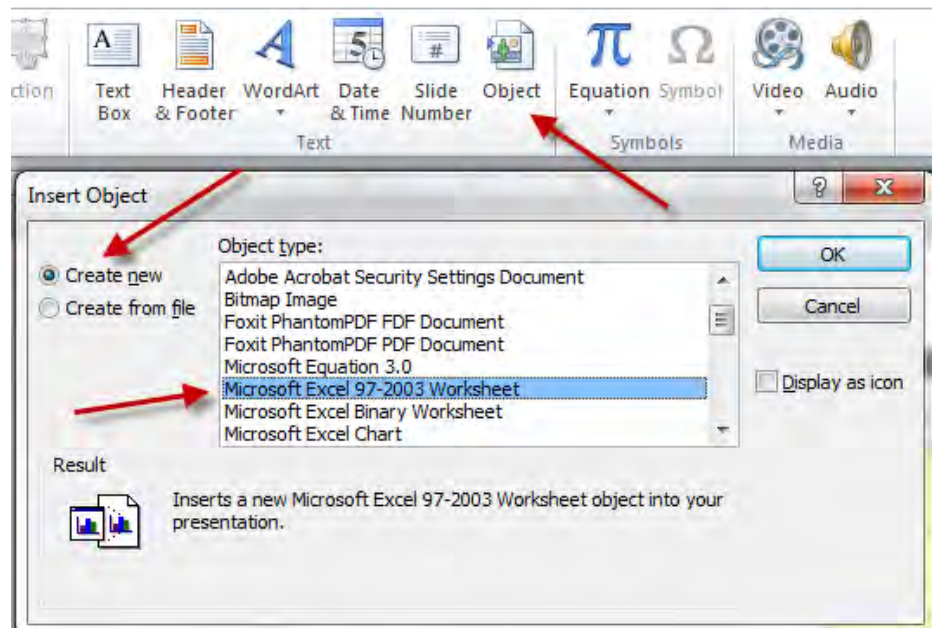
Inserting Spreadsheets and Charts into PowerPoint

There are several ways to insert an Excel spreadsheet into a PowerPoint presentation:

- Create New – Spreadsheet is created from scratch and embedded into the PowerPoint slide and not hyperlinked to an external spreadsheet.
- Create from file – Spreadsheet already exists and then is embedded into the PowerPoint slide and not hyperlinked to the source spreadsheet.
- Create from file and Linked - Spreadsheet already exists and then is embedded as a hyperlink into the PowerPoint slide and is therefore updated whenever updated in either location.

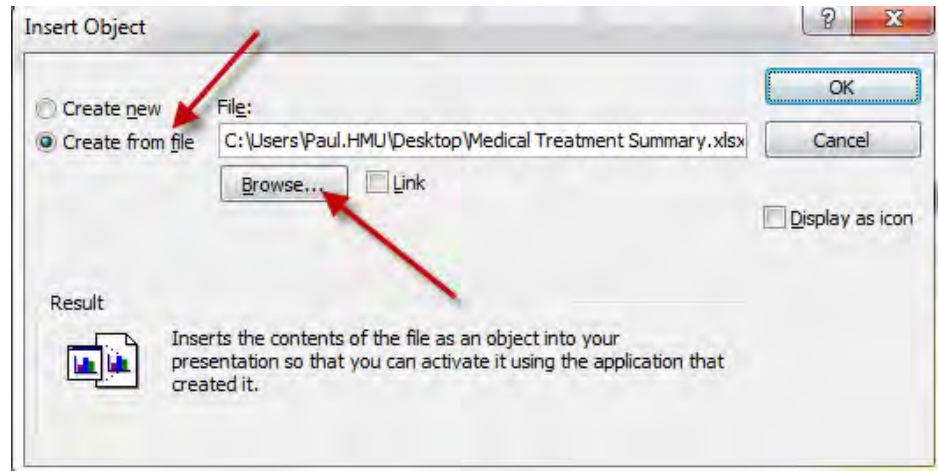
To Create New:

1. From the Insert ribbon, select Object. Select Microsoft Worksheet and Create new and then Ok.



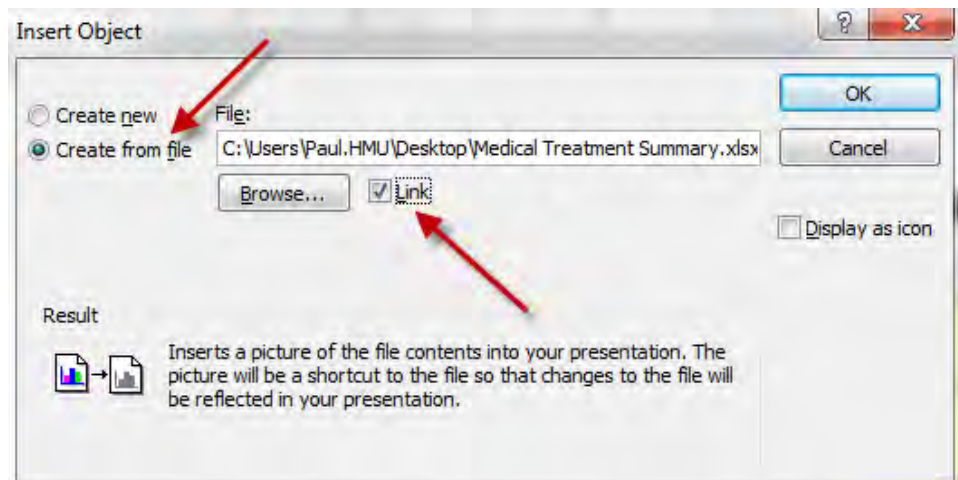
To Create from File:

1. From the Insert ribbon, select Object. Select Microsoft Worksheet and Create from file and then Ok.



To Create from File and Linked:

1. From the Insert ribbon, select Object. Select Microsoft Worksheet, Create from file, and then check the box labeled Link.

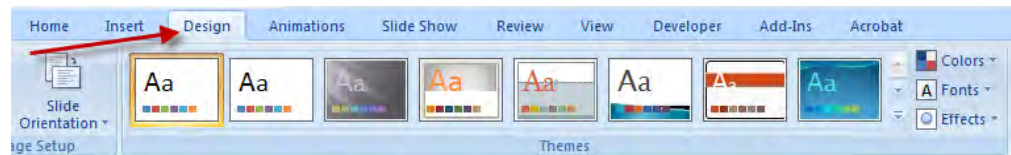


EXERCISE 14

Using Design Templates & Themes

One of the primary benefits of using a Theme (*.thmx) over a template (*.potx) is that you can apply the theme at any stage of building constructing your PowerPoint, and it will automatically update every slide in your presentation. Note, this could be bad also , requiring that you do a lot of tweaking and reformatting.

1. Click on the Design ribbon.



2. From Design Ribbon, select one of the Themes displayed in the ribbon. Note that this will affect every slide in your presentation. It is generally recommended that you apply a Theme when you first create the presentation so that you do not overwrite any custom colors and fonts that you have created for special slides. There are many Themes to select. Below are just a few samples to give you an idea about how they differ.

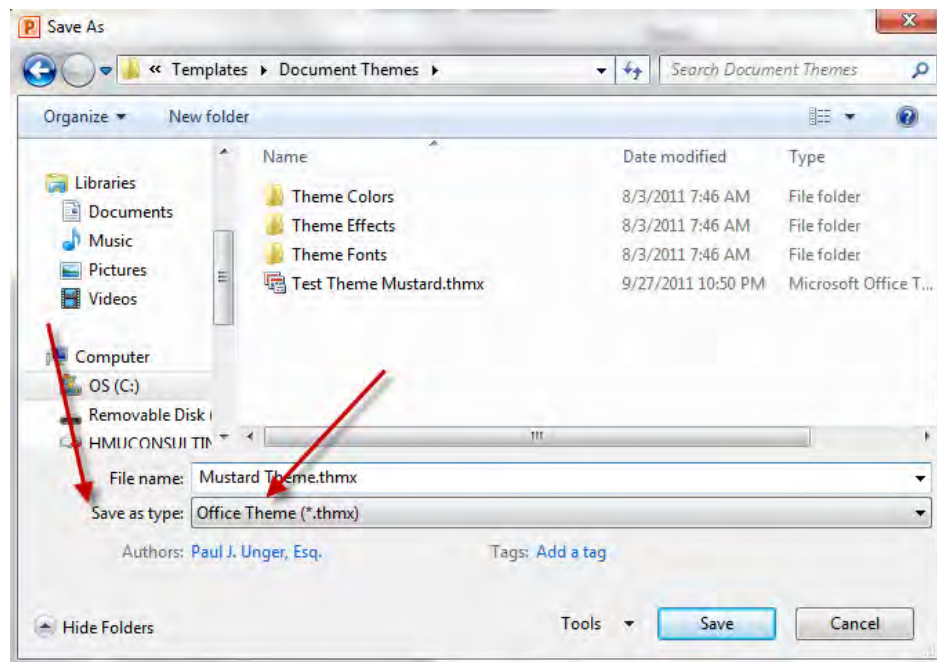




Saving Your Own Theme

One of the primary benefits of using a Theme (*.thmx) over a template (*.potx) is that you can apply the theme at any stage of building constructing your PowerPoint, and it will automatically update every slide in your presentation.

1. After customizing the colors, design and desired effects, select File > Save As, and then select Office Theme under Save as type.

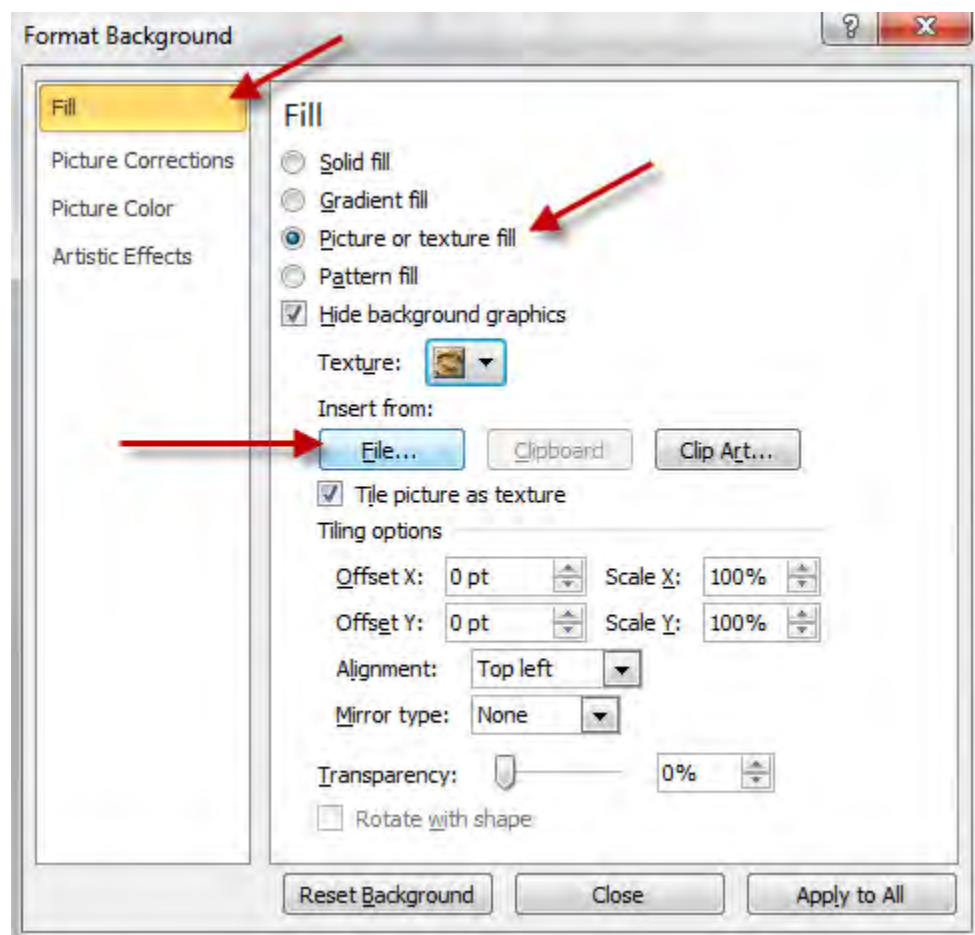


EXERCISE 15

Inserting Image as PowerPoint Backdrop

Sometimes, you may want to insert an image as a background or “backdrop” to a slide. Generally, photos do not make good backdrops, but custom made graphics can be provided to you in the form of a JPG, PNG, or other format.

1. Right-mouse click on an open area within your PowerPoint slide and select **Format Background**. Select **Fill**, then select the radio button **Picture or texture fill** and then **File**.



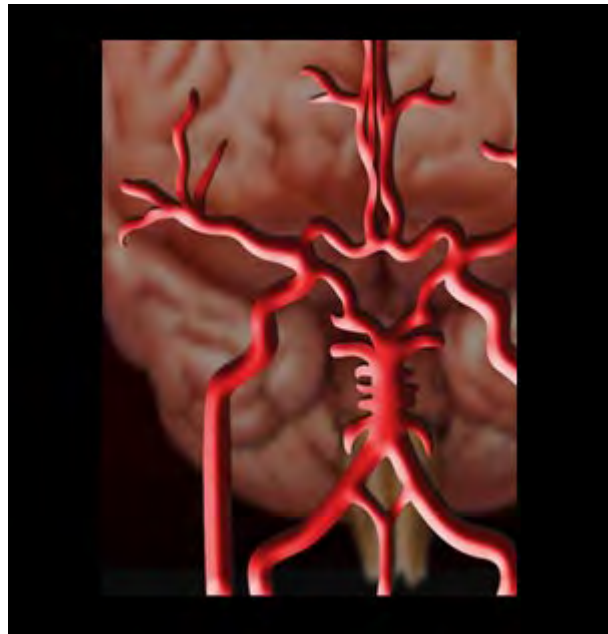
2. Browse to find the image file and double-click to select it. If you want to use that backdrop for just that one slide, click **Close**. If you want to apply the backdrop to all slides, click **Apply to All**.

EXERCISE 16

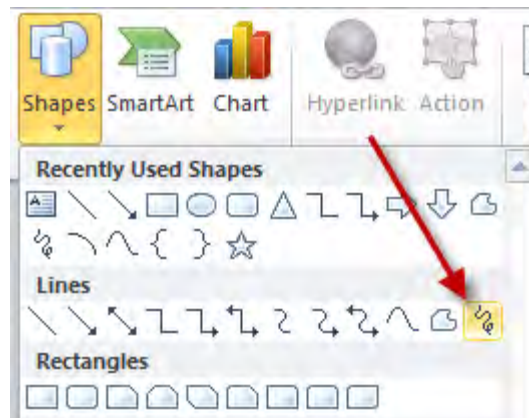
Adding “Animation” of Object to Existing Photograph

In this example, we are going to give the illusion that blood is flowing through a vessel. It requires that we first have two images – (1) a picture/graphic of a blood vessel, and (2) a picture/graphic of blood. Both can be obtained through a licensed source of stock photography or graphics.

1. Select a plain dark background free of any graphics (black is preferable).
2. From the Insert ribbon, select Picture. Browse to the graphic of the blood vessel and double-click to insert it into the PowerPoint slide:



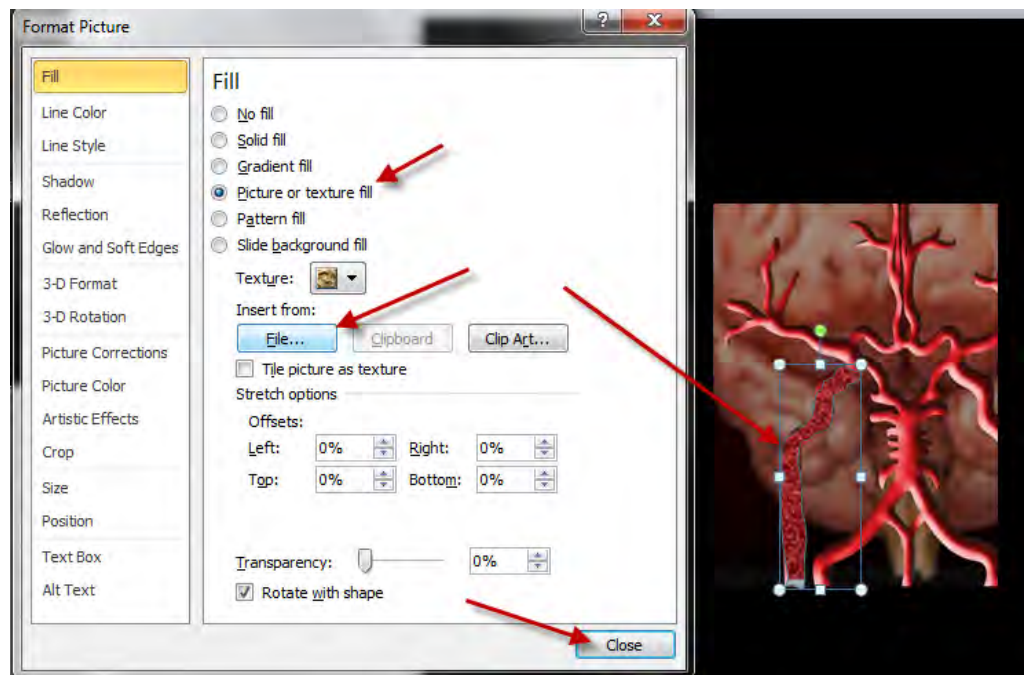
3. From the **Insert** ribbon, select **Shapes**. Select the **Scribble** tool.



- Using the pencil pointer, trace the edges of the blood vessel, as seen below.



- Right-mouse click on the drawn shape and select **Format Shape**. Select **Fill**, and then the radio button **Picture or texture fill** and then **File** to browse to your blood graphic. Double-click to insert the blood as a fill color for the blood vessel. Select **Line Color** and then **No Line**. Select **Close**.



- Animate the blood by selecting the hand-drawn shape, select Animation and then Custom Animation (Add Animation in PowerPoint 2010), then use the Wipe effect – direction from bottom.



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Presented By:

Paul Unger, Esq.

punger@affinityconsulting.com

SMART BUSINESS STRATEGIES FOR THE LEGAL WORLD.

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Home Tools

Common Controls Toolbar

Page Controls

Quick Tools

Recent Tools

Page Thumbnails

Navigation Pane

(F4)

Lawyer's Guide to PDF Files

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Columbus, OH 43220
614.340.3444
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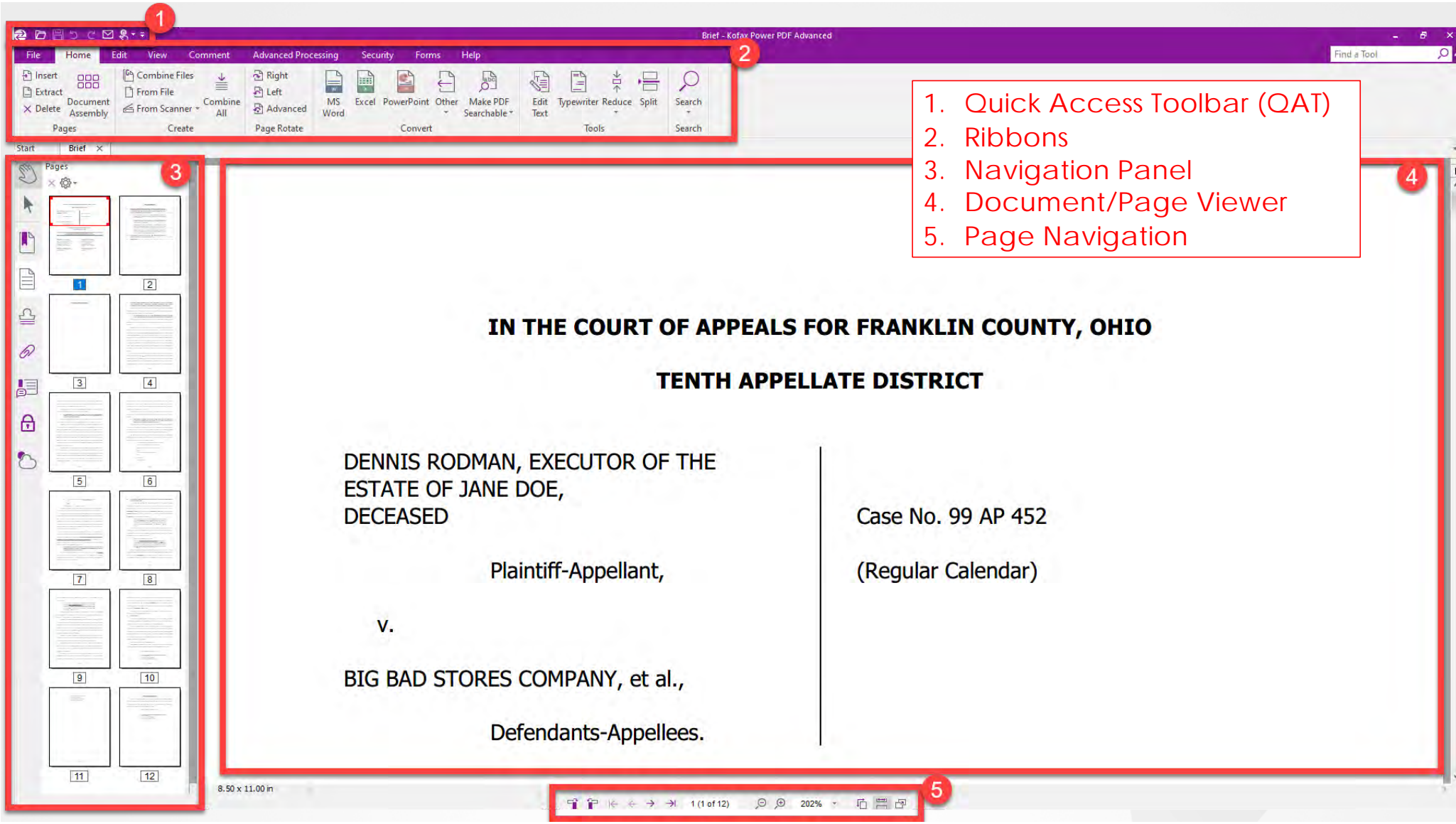
- Create PDF
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- Edit PDF
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- Stamp

Your current plan is Creative



PowerPDF Main Interface

- 1. Quick Access Toolbar (QAT)**
- 2. Ribbons**
- 3. Navigation Panel**
- 4. Document/Page Viewer**
- 5. Page Navigation**



1. Quick Access Toolbar (QAT)
2. Ribbons
3. Navigation Panel
4. Document/Page Viewer
5. Page Navigation

IN THE COURT OF APPEALS FOR FRANKLIN COUNTY, OHIO

TENTH APPELLATE DISTRICT

DENNIS RODMAN, EXECUTOR OF THE
ESTATE OF JANE DOE,
DECEASED

Plaintiff-Appellant,

v.

BIG BAD STORES COMPANY, et al.,

Defendants-Appellees.

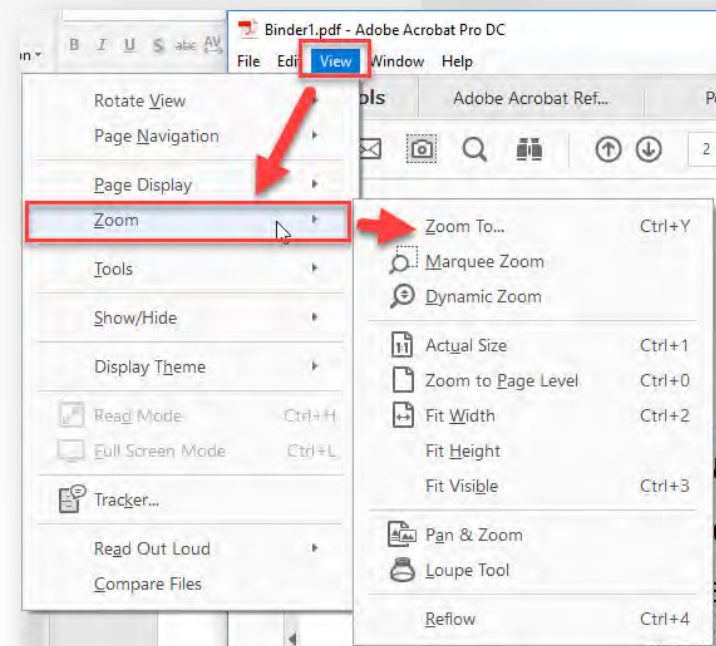
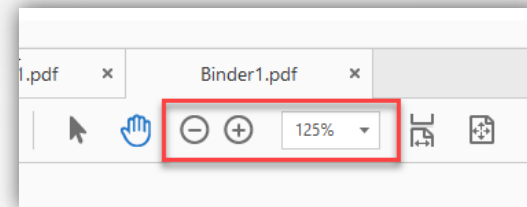
Case No. 99 AP 452

(Regular Calendar)

Zoom - Acrobat

- ▶ + and – buttons or the zoom control
- ▶ CTRL + mouse wheel
- ▶ Miscellaneous tools (Marquee Zoom)
- ▶ View -> Zoom

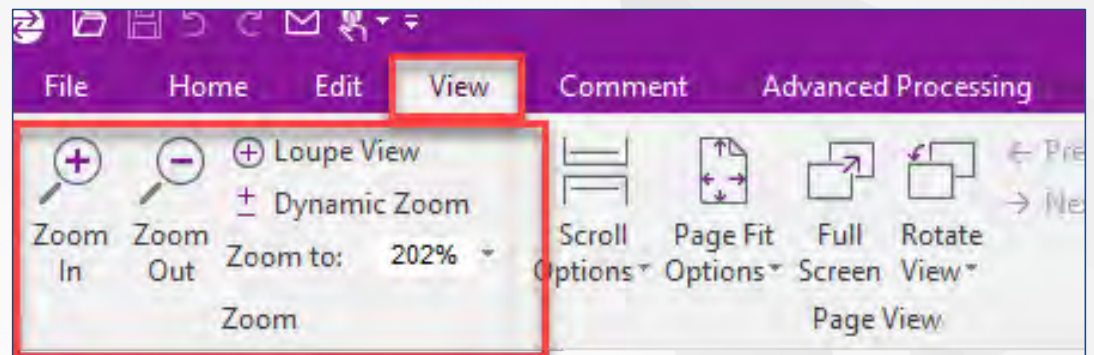
Remember you can set your preferred zoom in the options (prior slide).



Zoom – Power PDF

- ▶ **+ and – buttons or the zoom control**
- ▶ **CTRL + mouse wheel**
- ▶ **Miscellaneous tools (Marquee Zoom)**
- ▶ **View -> Zoom**

Remember you can set your preferred zoom in the options (prior slide).



Full Screen View - Acrobat

CTRL+L
**(Look at the document,
and nothing else)**

Full Screen Mode
takes over the entire
screen and displays
the document one
page at a time.

Press CTRL+L or
Escape to leave Full
Screen Mode.

A. BIG BAD'S BRIEF DEMONSTRATES THAT REASONABLE MINDS, CONSTRUING THE EVIDENCE MOST FAVORABLY TOWARD PLAINTIFF, CAN REACH DIFFERENT CONCLUSIONS ON THE ISSUE OF OCCUPANCY AND CONTROL.

Big Bad's Brief in this case proves the point of this appeal: Reasonable minds can differ on whether Big Bad (1) occupied or controlled the premises in question and (2) on whether "special circumstances" existed to render Big Bad liable.

1. BY REFERENCE ONLY TO THE LEASE, REASONABLE MINDS CAN DIFFER OVER WHETHER BIG BAD OCCUPIED OR CONTROLLED THE PREMISES

Big Bad's first argument is that various Lease provisions show that Candyland, and not Big Bad, occupies and controls the place where the incident occurred—the west side of the Big Bad store.

Big Bad cites Article 9, entitled "Common Area," to argue that Big Bad has no rights of occupancy or control over the west side of the Big Bad store. This same Article, Big Bad argues, requires Candyland (and not Big Bad) to provide security. Big Bad then cites Article 20, entitled "Indemnity Liability," which requires Candyland to indemnify and save Big Bad harmless from claims for injuries or death due to acts or omissions of Candyland in the maintenance of the premises. Big Bad also cites Article 8, entitled "Repairs and Replacements," which relates to the duty to keep sidewalks free of ice and snow. Big Bad cites Article 31, entitled "Outdoor Sales" relative to sidewalk sales. Big Bad cites these provisions to argue that Candyland, and not Big Bad, retains all rights of occupancy and control of the place where the incident occurred.

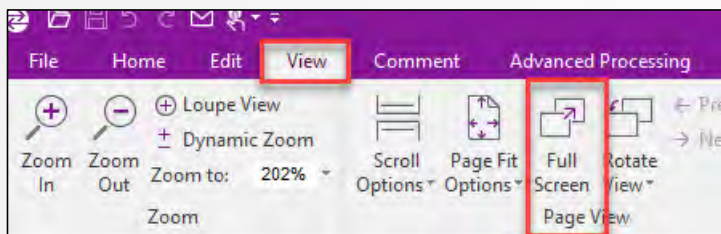
On the other hand, Plaintiff, in its Brief, cites Lease provisions (many of which are the same) to show that Big Bad does have rights of occupancy and control under the Lease. Plaintiff cites Article 1, entitled "Premises" in support of its argument that the "Demised Premises" includes the west wall of the Big Bad store. Plaintiff cites Article 9, entitled "Common Area" (as did Big Bad) in support of the notion that Big Bad has rights of occupancy and control

Full Screen View – Power PDF

CTRL+L
**(Look at the document,
and nothing else)**

Full Screen Mode takes over the entire screen and displays the document one page at a time.

Press CTRL+L or Escape to leave Full Screen Mode.



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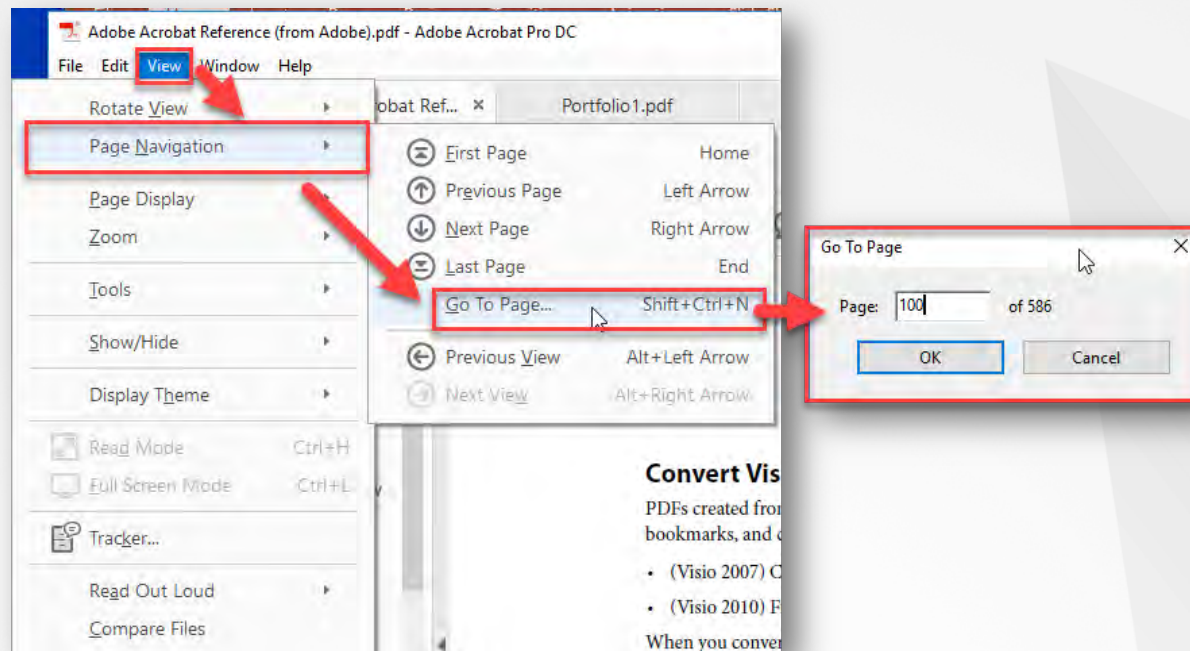
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Go to a Particular Page



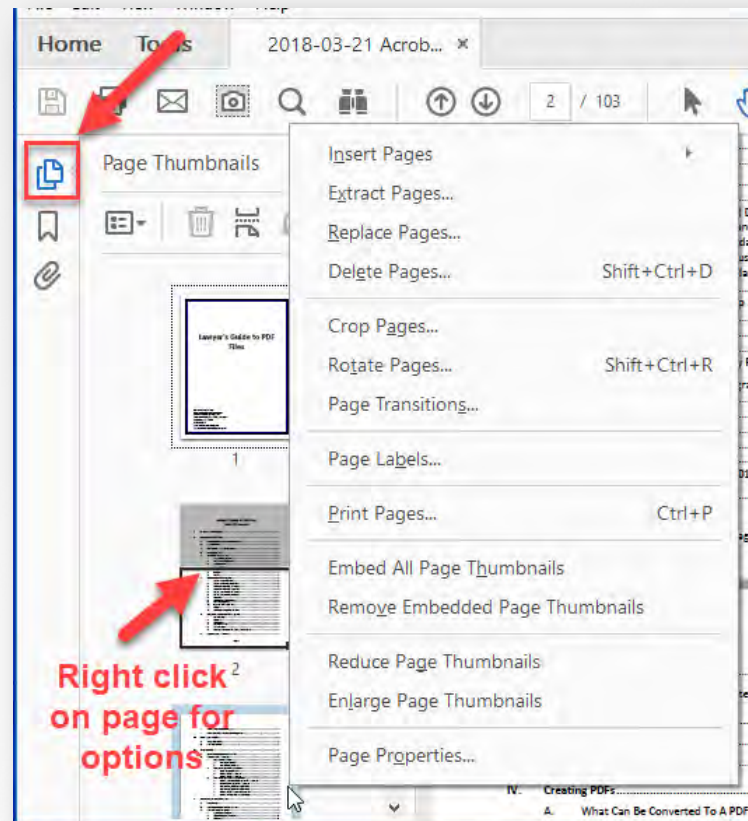
Go There Now



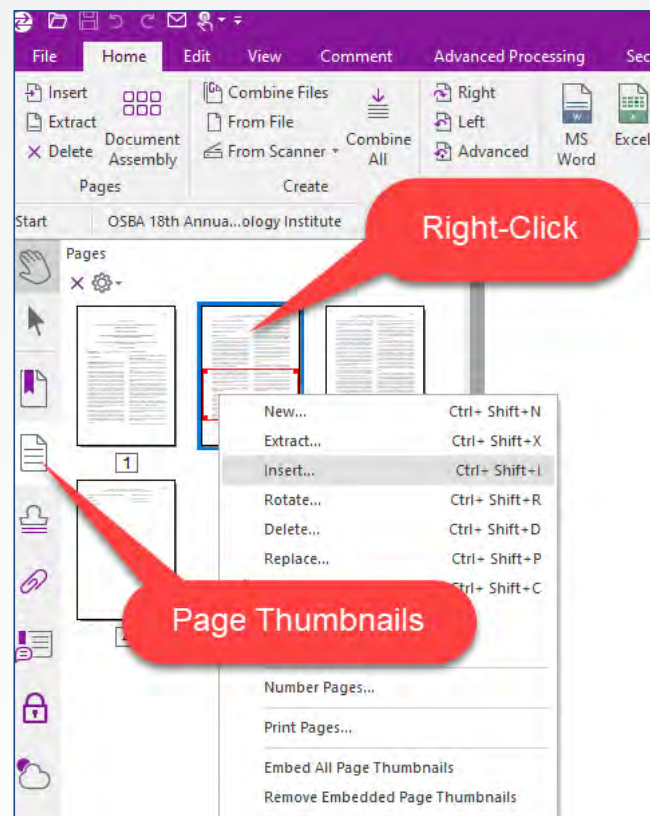
Manipulating PDFs

- ▶ **Thumbnails**
- ▶ **Organize Tools**
- ▶ **Split Document**
- ▶ **Shrink Document**
- ▶ **Convert Document**
- ▶ **Editing PDFs**
- ▶ **Securing PDFs**
- ▶ **Comparing PDFs**

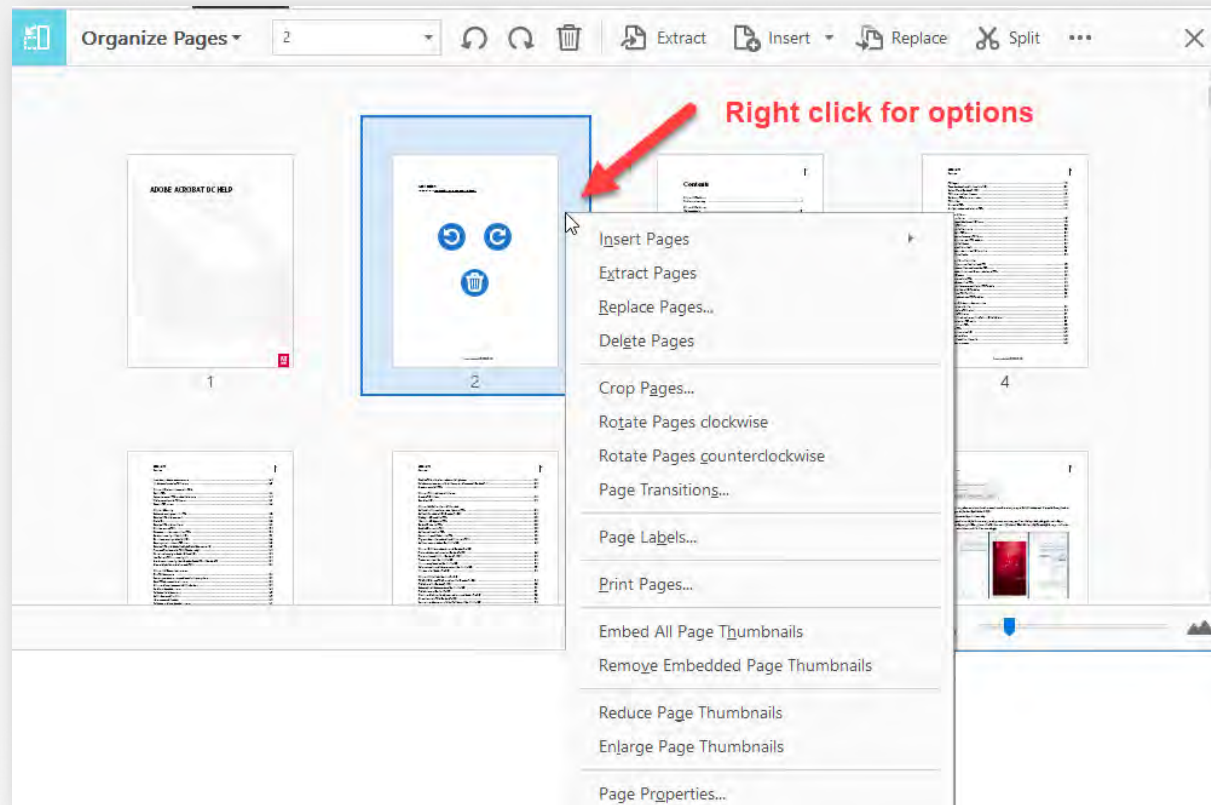
Page Thumbnails - Acrobat



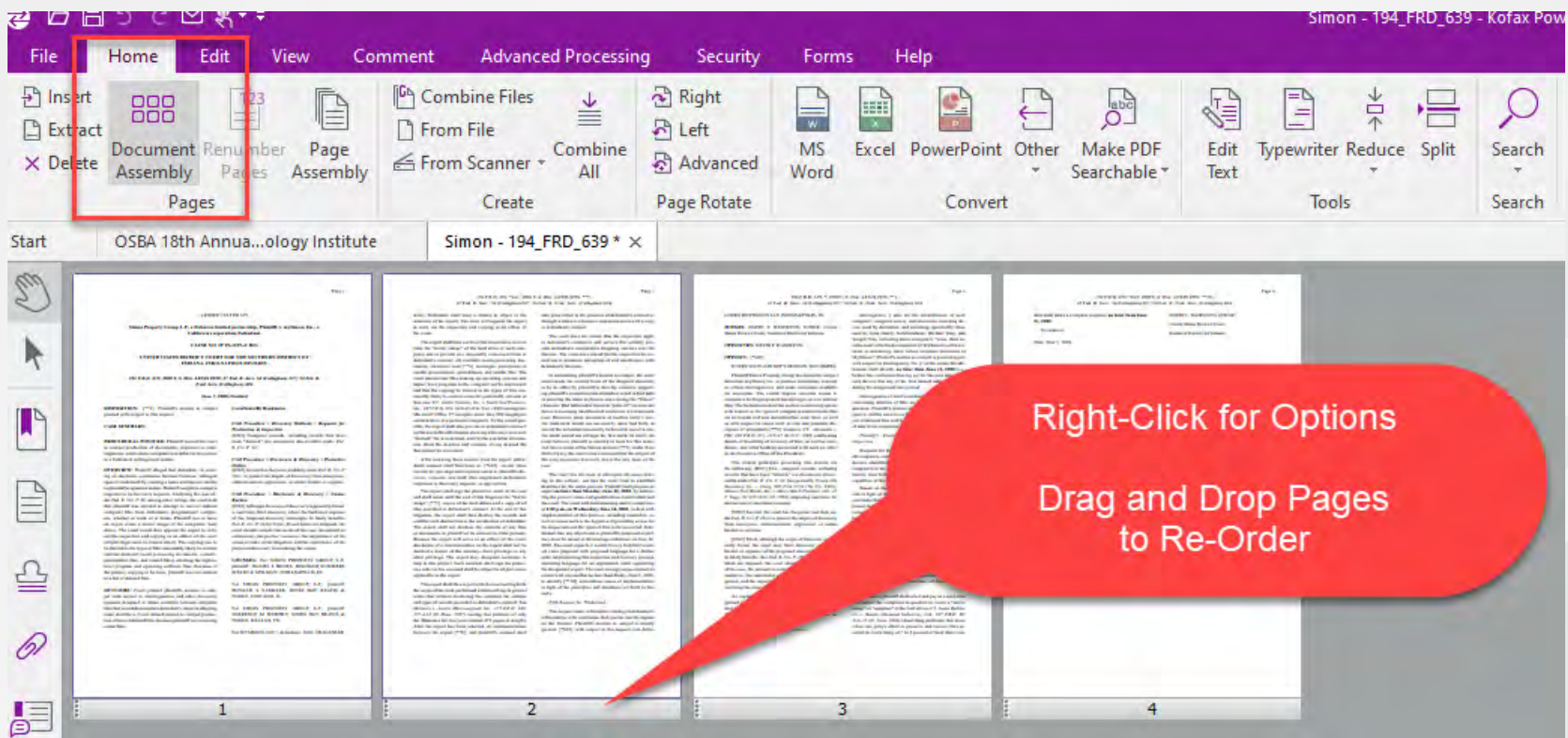
Page Thumbnails – Power PDF



Organize Tool - Acrobat



Organize Tool – Power PDF



Simon - 194_FRD_639 - Kofax Power PDF Advanced

File Home Edit View Comment Advanced Processing Security Forms Help Find a Tool

Insert Extract Document Assembly Pages Combine Files From File From Scanner Create Combine All Page Rotate MS Word Excel PowerPoint Other Make PDF Searchable Edit Text Typewriter Reduce Split Search

OSBA 18th Annual...ology Institute Simon - 194_FRD_639 * x

Page 3

194 F.R.D. 639, *641; 2000 U.S. Dist. LEXIS 8950, **5; 47 Fed. R. Serv. 3d (Callaghan) 247; 54 Fed. R. Evid. Serv. (Callaghan) 604

tents). Defendant shall have a chance to object to the selection of the expert. The court will appoint the expert to carry out the inspection and copying as an officer of the court.

The expert shall then use his or her expertise to recover from the "mirror image" of the hard drive of each computer, and to provide in a reasonably convenient form to defendant's counsel, all available word-processing documents, electronic mail [**6] messages, powerpoint or similar presentations, spreadsheets, and similar files. The court intends that files making up operating systems and higher level programs in the computer not be duplicated, and that the copying be limited to the types of files reasonably likely to contain material potentially relevant to this case. Cf. *Adobe Systems, Inc. v. South Sun Products, Inc.*, 187 F.R.D. 636, 642-43 (S.D. Cal. 1999) (noting that Microsoft Office 97 occupies more than 200 megabytes on hard drive of a personal computer). To the extent possible, the expert shall also provide to defendant's counsel: (a) the available information showing when any recovered "deleted" file was deleted, and (b) the available information about the deletion and contents of any deleted file that cannot be recovered.

After receiving these records from the expert, defendant's counsel shall then have to [**642] review these records for privilege and responsiveness to plaintiff's discovery requests, and shall then supplement defendant's responses to discovery requests, as appropriate.

The expert shall sign the report in the case and deliver to the court at the end of this litigation the "mirror image" [**7] copies of the hard drives and a copy of all files provided to defendant's counsel. At the end of this litigation, the expert shall then destroy the records and confirm such destruction to the satisfaction of defendant. The expert shall not disclose the contents of any files or documents to plaintiff or its counsel or other persons. Because the expert will serve as an officer of the court, disclosure of a communication to the expert shall not be deemed a waiver of the attorney-client privilege or any other privilege. The expert may designate assistants to help in this project. Each assistant shall sign the protective order in this case and shall be subject to all provisions applicable to the expert.

The expert shall file a report with the court setting forth the scope of the work performed and describe in general 8.27 x 11.69 in

2 of 4 92.5%

Judge-s-Entertaining-Order-in-Strip-Club-Case - Kofax Power PDF Advanced

File Home Edit View Comment Advanced Processing Security Forms Help Find a Tool

Insert Extract Document Assembly Pages Combine Files From File From Scanner Create Combine All Page Rotate MS Word Excel PowerPoint Other Make PDF Searchable Edit Text Typewriter Reduce Split Search

Judge-s-Entertaining-Order-in-Strip-Club-Case

BACKGROUND

Following settlement of litigation arising out of the previous 2003 ordinance regulating gentlemen's clubs, the City adopted an ordinance in 2005 which prohibited nude and topless dancing in public places and required permits for "human display establishments." The ordinance also subjected human display establishments to certain lighting, open-view building configurations and zoning restrictions.

In 2009, operators of certain adult entertainment clubs sued in state court challenging the ban on nude dancing and the ordinance. The state court ruled in favor of the City and the ordinance was upheld. The Court of Appeals affirmed the state court's decision prohibiting nude dancing in public places and requiring permits for human display establishments.

The ordinance requiring permits for human display establishments imposed no greater incidental restriction on protected speech than was essential to the furtherance of the governmental interest in combating secondary effects associated with sexually oriented businesses ("SOBs"). *Id.* Therefore, the ordinance withstood intermediate scrutiny and did not violate the free speech rights of erotic dancers. *Id.* In reaching this conclusion, the Fourth Court pointed out that being in a state of nudity is not an inherently expressive condition and being required by the ordinance to go from complete nudity to partly clothed

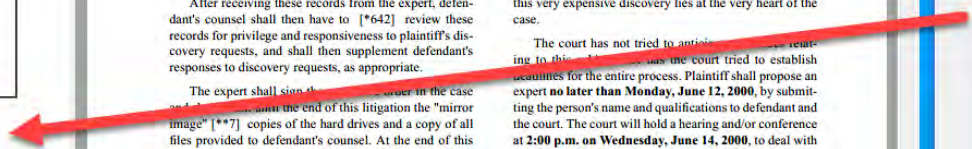
¹gentleman . . . n. . . 2. A polite, gracious or considerate man having high standards of propriety or correct behavior." WEBSTER'S II DICTIONARY 526 (New Riverside Univ. ed. 1984). The term is loosely used in this context.

4

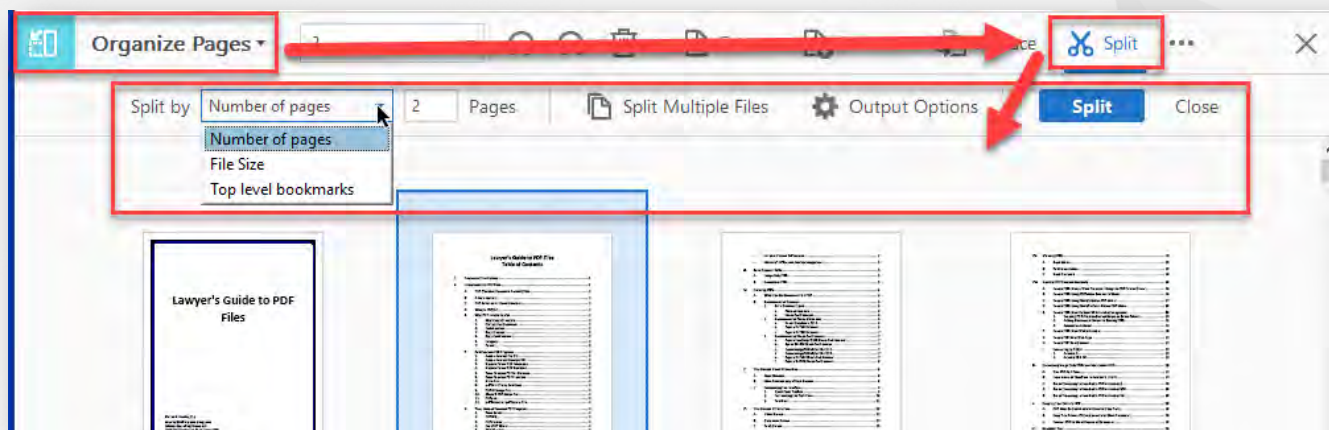
PJU003595

8.50 x 11.00 in 4 of 240 78.4%

Drag & Drop from One Page Thumbnail View into the Destination Page Thumbnail View

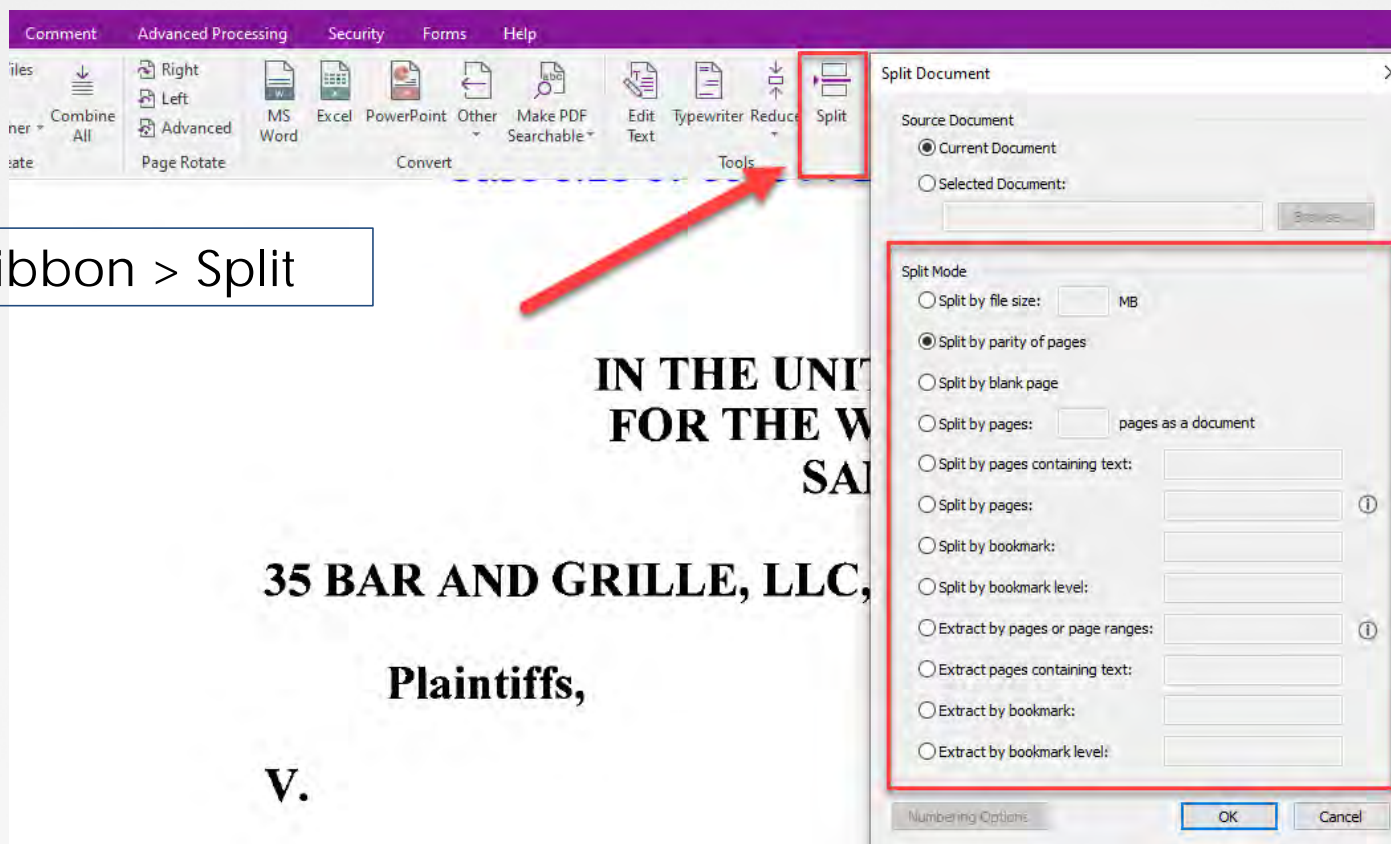


Split Document - Acrobat



Split Document – Power PDF

Home Ribbon > Split



The screenshot displays the Power PDF software interface. The Home Ribbon is visible at the top, with the 'Split' button highlighted by a red box and a red arrow pointing to it. The 'Split Document' dialog box is open on the right side, also with a red box around it. The dialog box shows the 'Source Document' set to 'Current Document' and the 'Split Mode' set to 'Split by parity of pages'. The background shows a document page with the text: 'IN THE UNITED STATES OF AMERICA', '35 BAR AND GRILLE, LLC,', 'Plaintiffs,', and 'v.'.

Comment Advanced Processing Security Forms Help

files
ner > Combine All
:ate Page Rotate

Right
Left
Advanced
Page Rotate

MS Word
Excel
PowerPoint
Other
Convert

Make PDF Searchable
Edit Text
Typewriter
Reduce
Tools

Split

Split Document

Source Document
 Current Document
 Selected Document:
Browse...

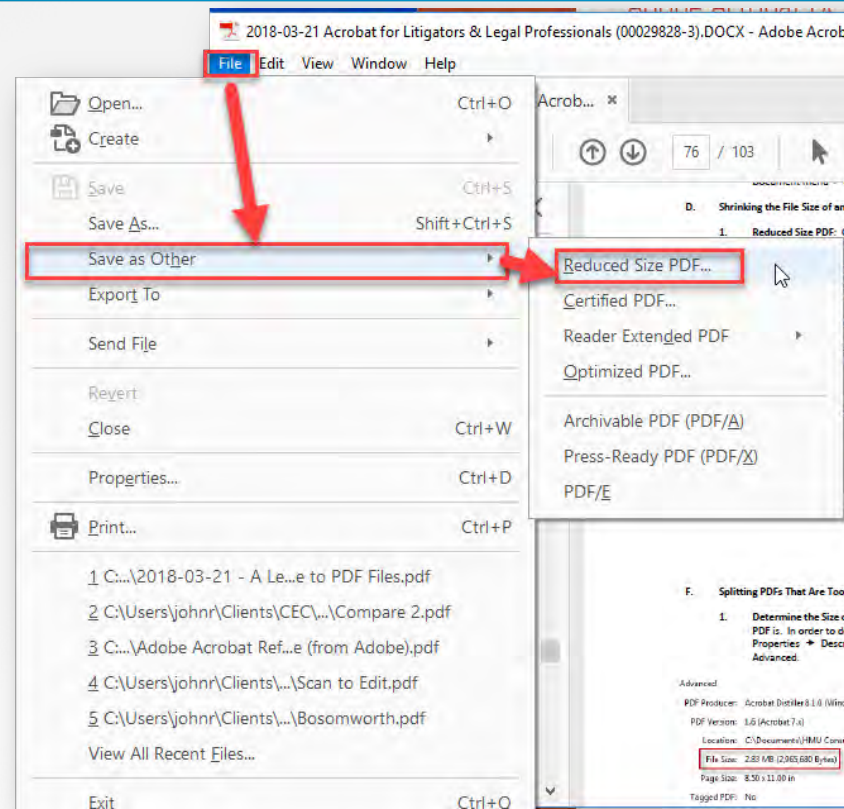
Split Mode
 Split by file size: MB
 Split by parity of pages
 Split by blank page
 Split by pages: pages as a document
 Split by pages containing text:
 Split by pages: ⓘ
 Split by bookmark:
 Split by bookmark level:
 Extract by pages or page ranges: ⓘ
 Extract pages containing text:
 Extract by bookmark:
 Extract by bookmark level:

Numbering Options:

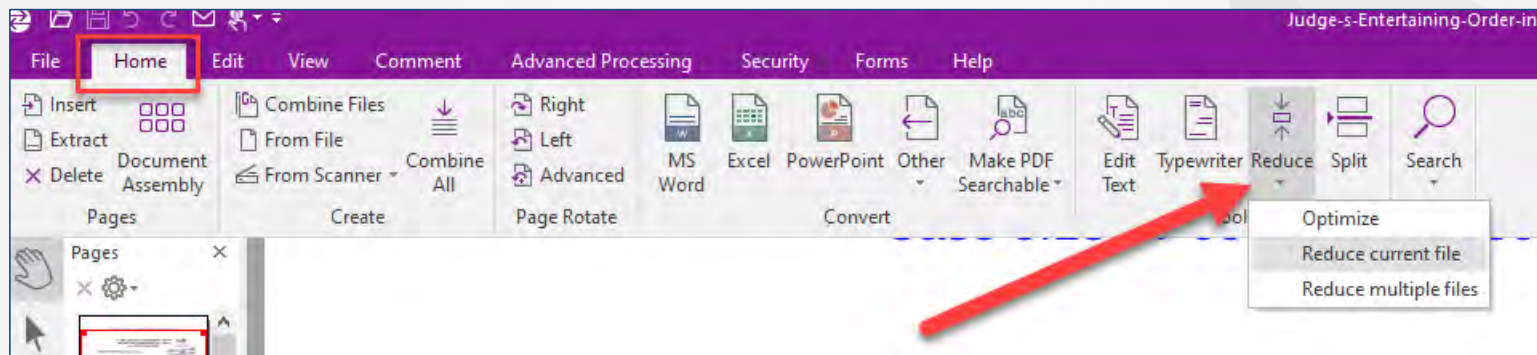
IN THE UNITED STATES OF AMERICA
FOR THE WESTERN DISTRICT OF MISSOURI
SALE

35 BAR AND GRILLE, LLC,
Plaintiffs,
v.

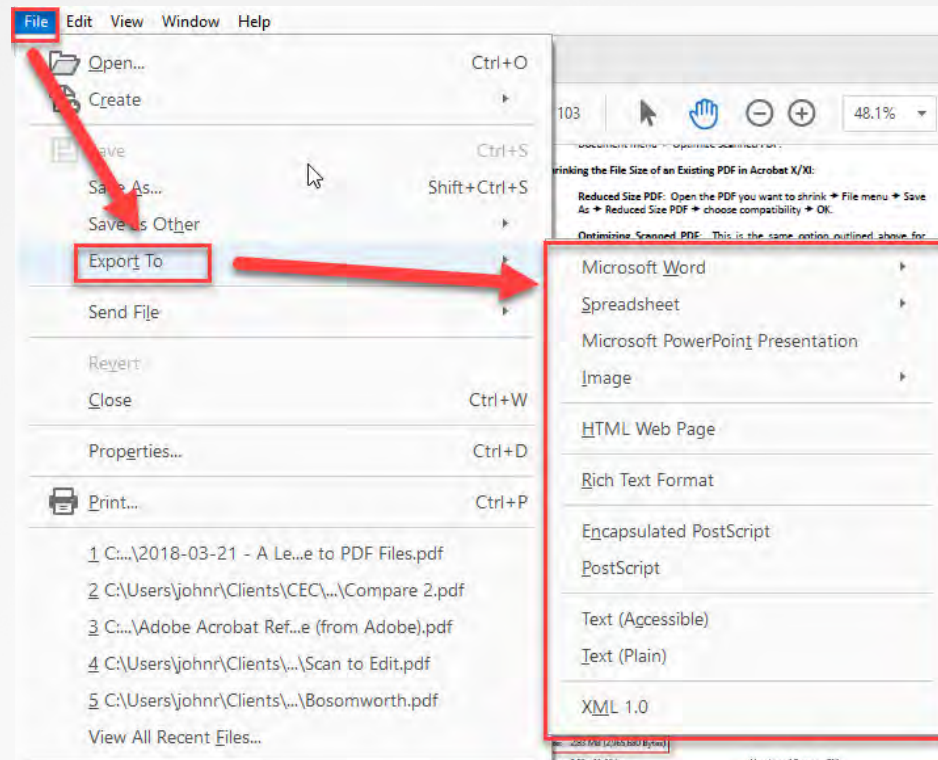
Shrink Document - Acrobat



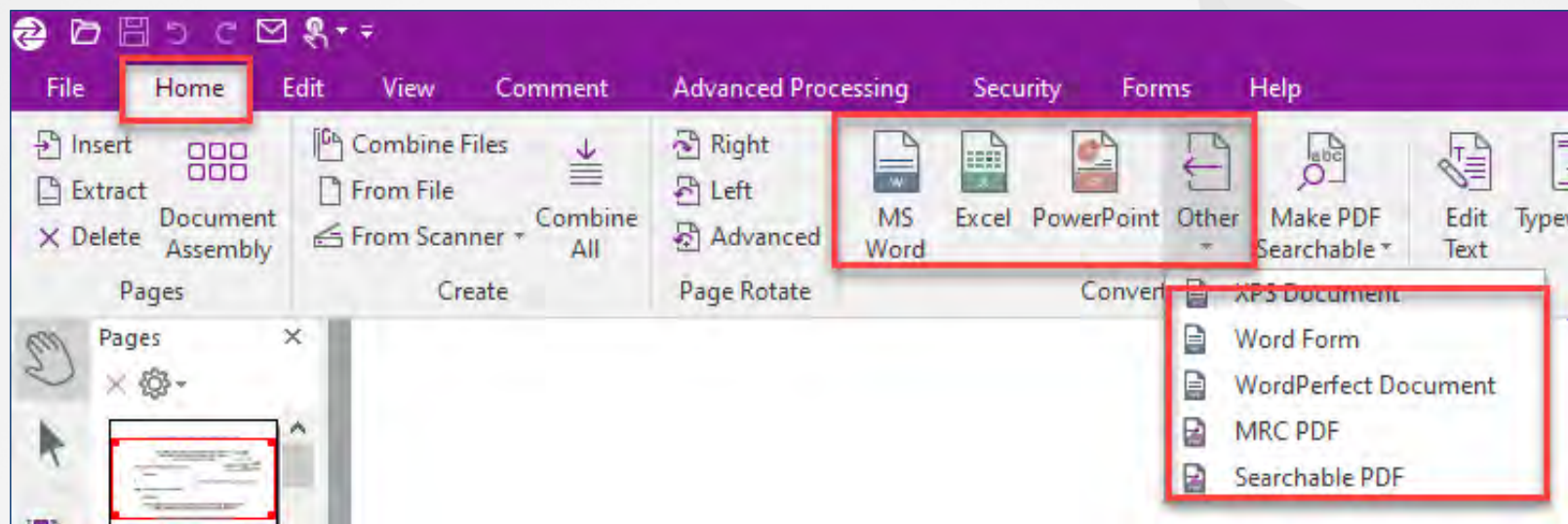
Shrink Document – Power PDF



Convert Document - Acrobat



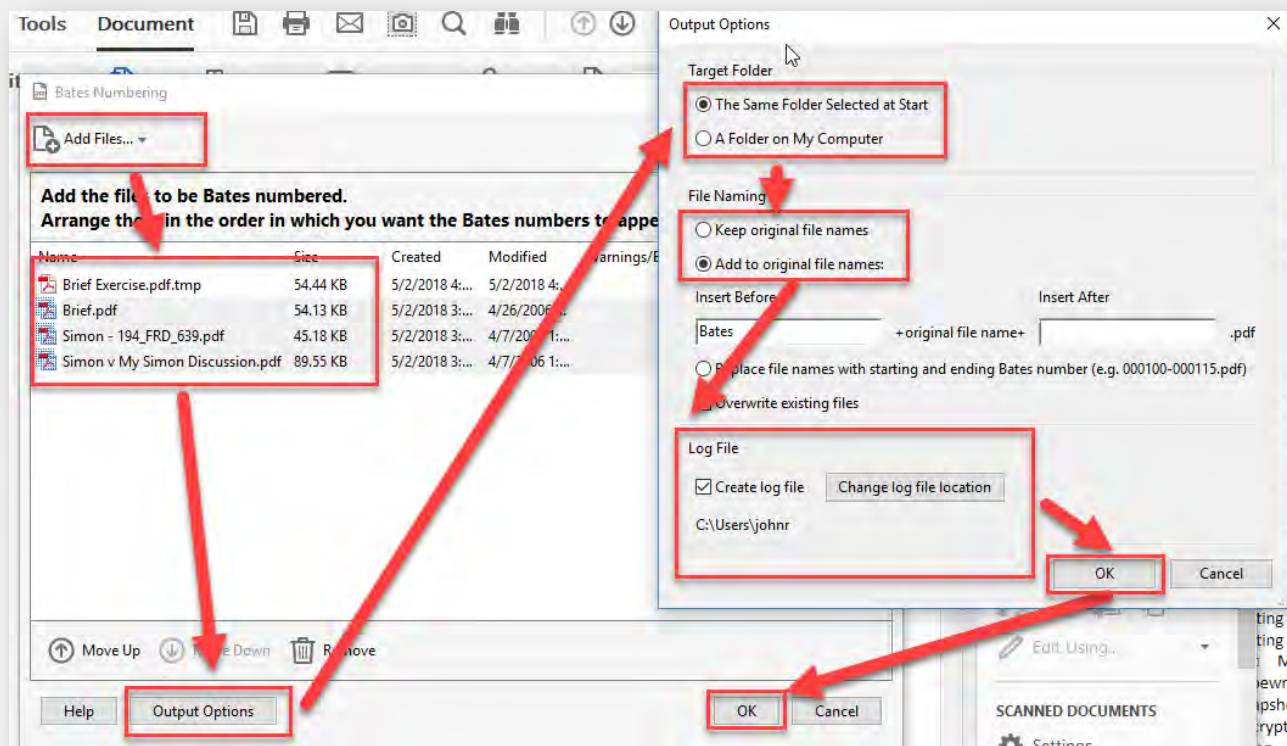
Convert Document – Power PDF



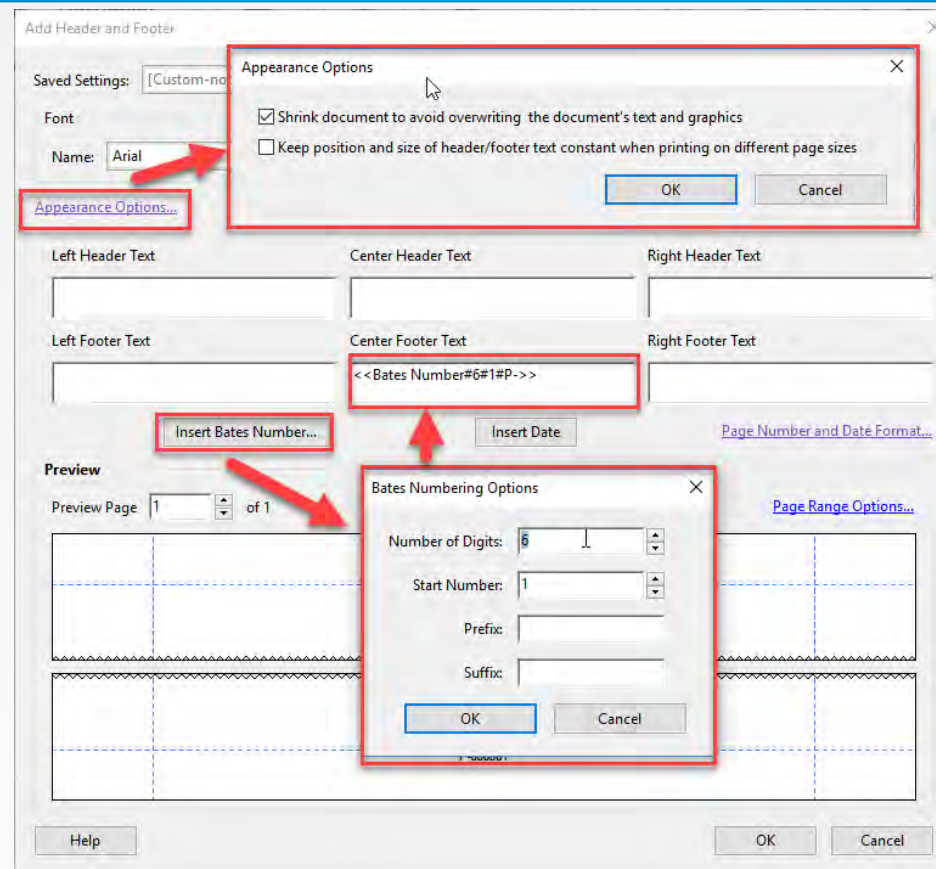
Bates Numbering



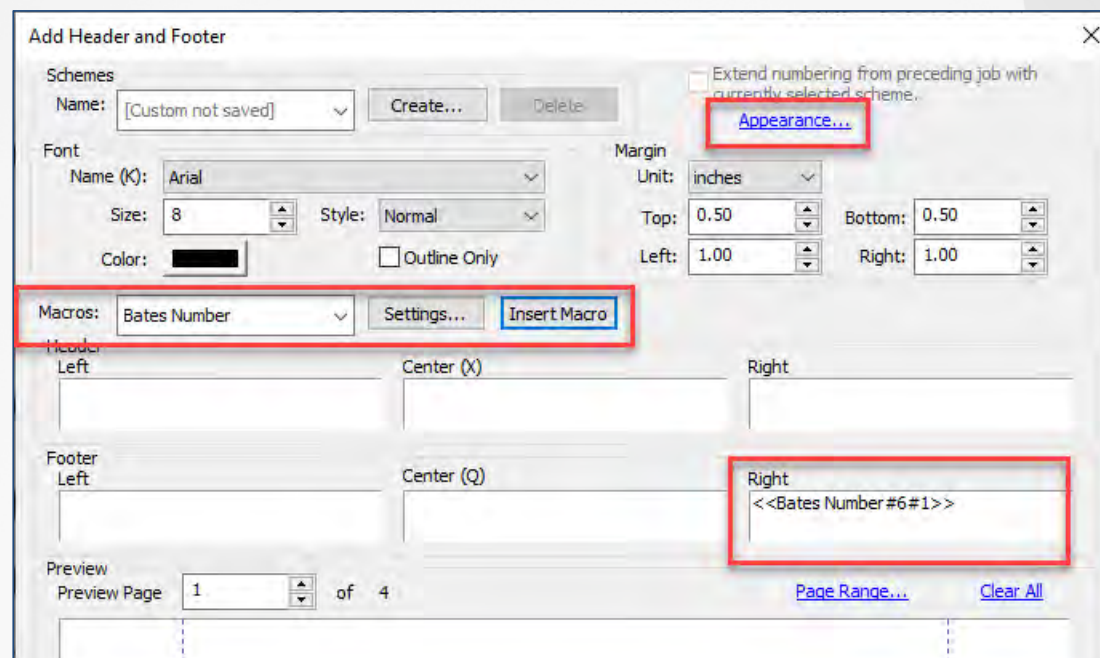
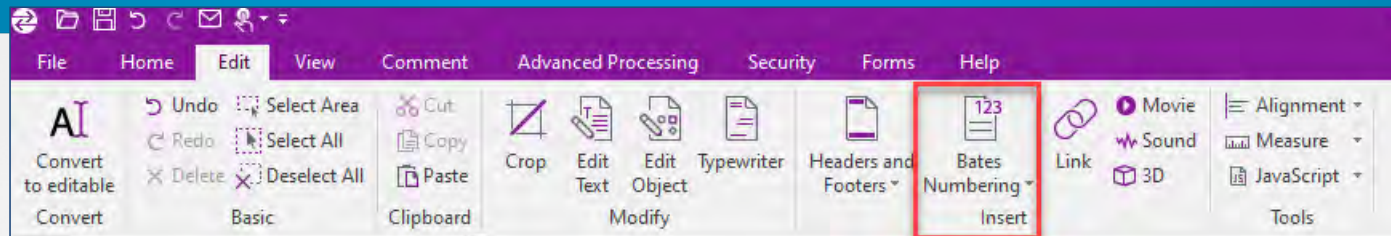
Bates Numbering Pt 1 - Acrobat



Bates Numbering Pt 2 - Acobat



Bates Numbering – Power PDF

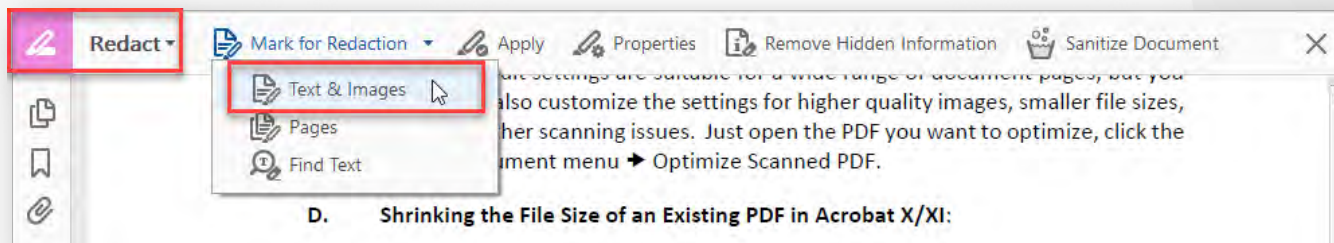


Redacting

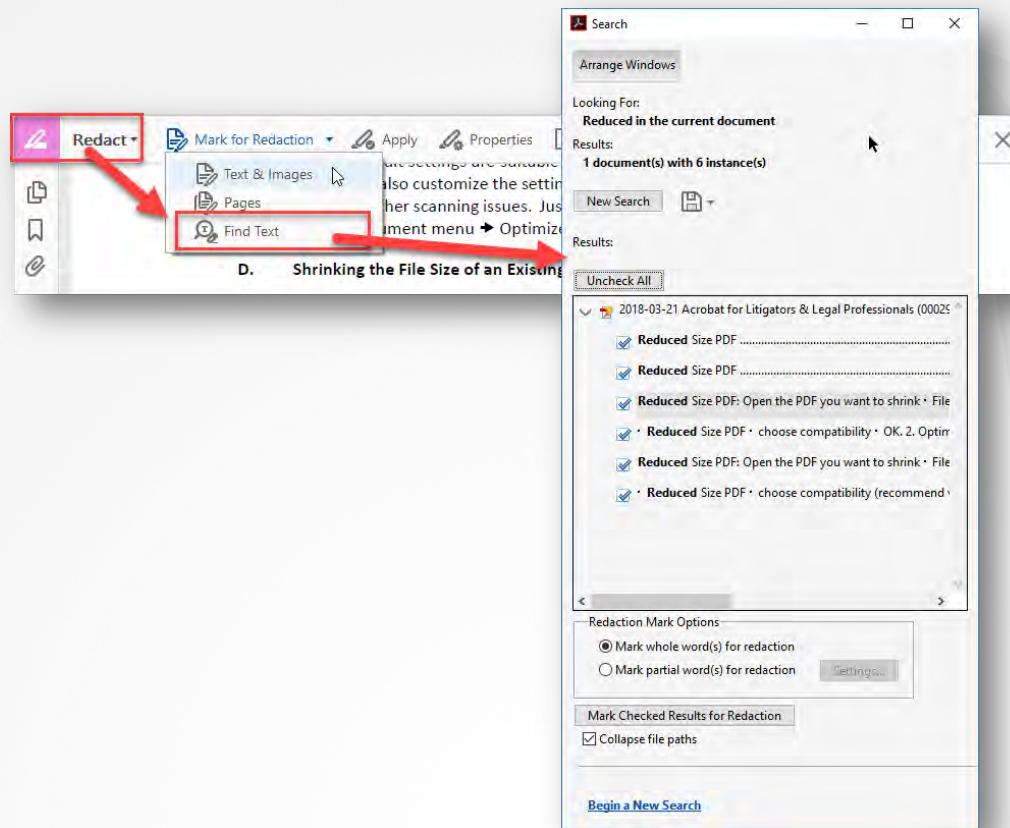
- ▶ **You must use the redaction tool.**
- ▶ **DO NOT DRAW BLACK BOXES WITH THE COMMENT TOOLS!**

Redaction - Acrobat

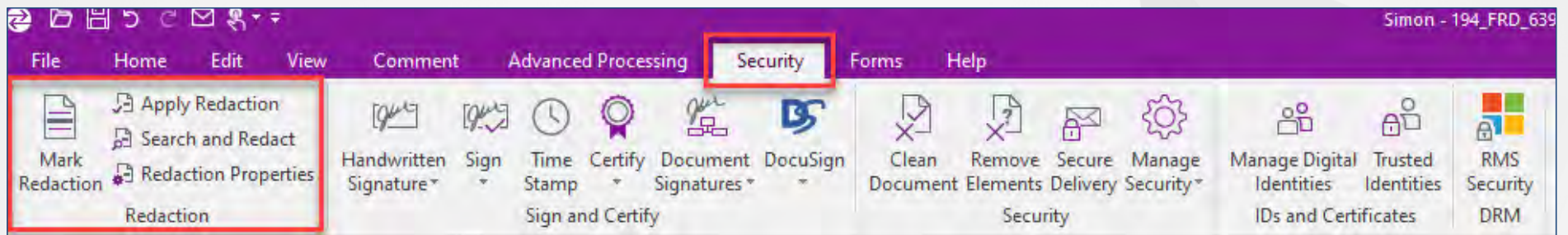
1. Save your document with a different name
2. Mark areas for Redaction
3. Apply Redactions
4. Save



Redaction – Search and Redact



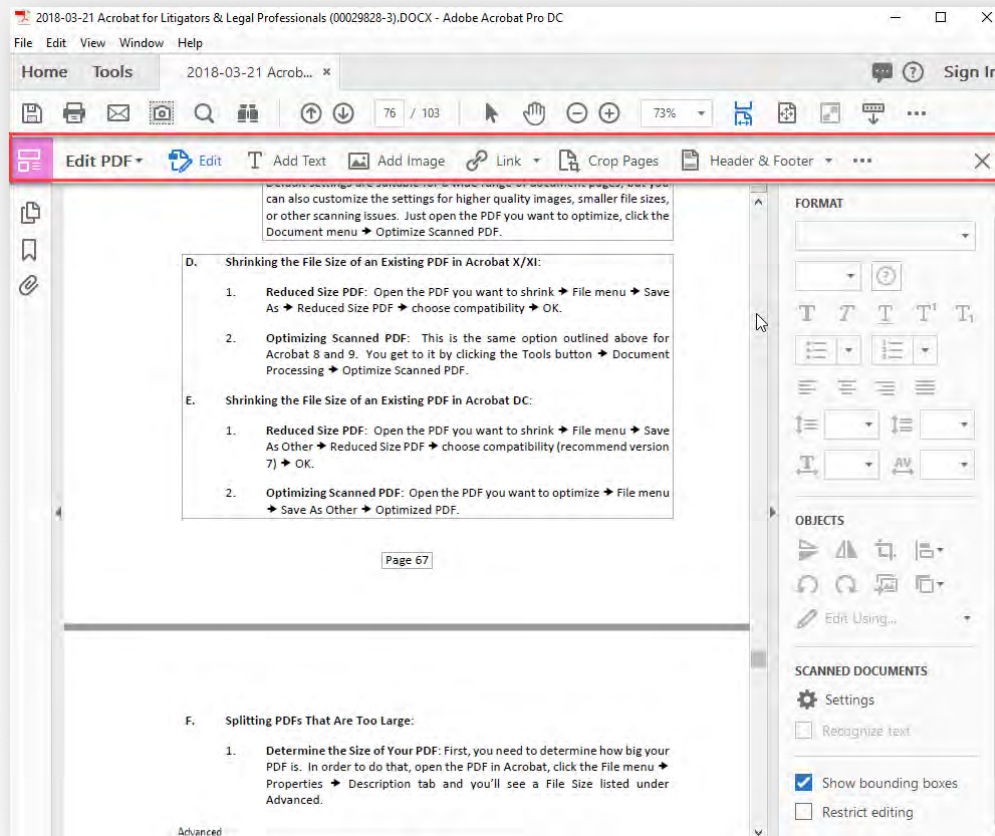
Redaction – Power PDF



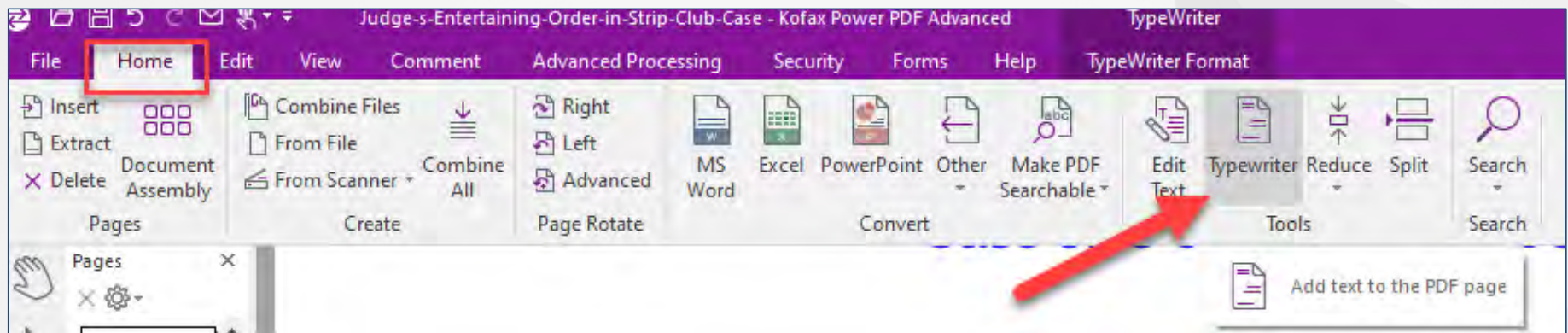
Typewriter Tool – Acrobat

- ▶ **Edit Tool**
- ▶ **Scanned PDFs must be recognized for editable text**
- ▶ **“Add Text” (Typewriter Tool) can add text to any PDF**
- ▶ **Snapshot Tool can copy image of PDF**
- ▶ **PDF Security**
- ▶ **Comparing PDFs**

Typewriter Tool – Acrobat

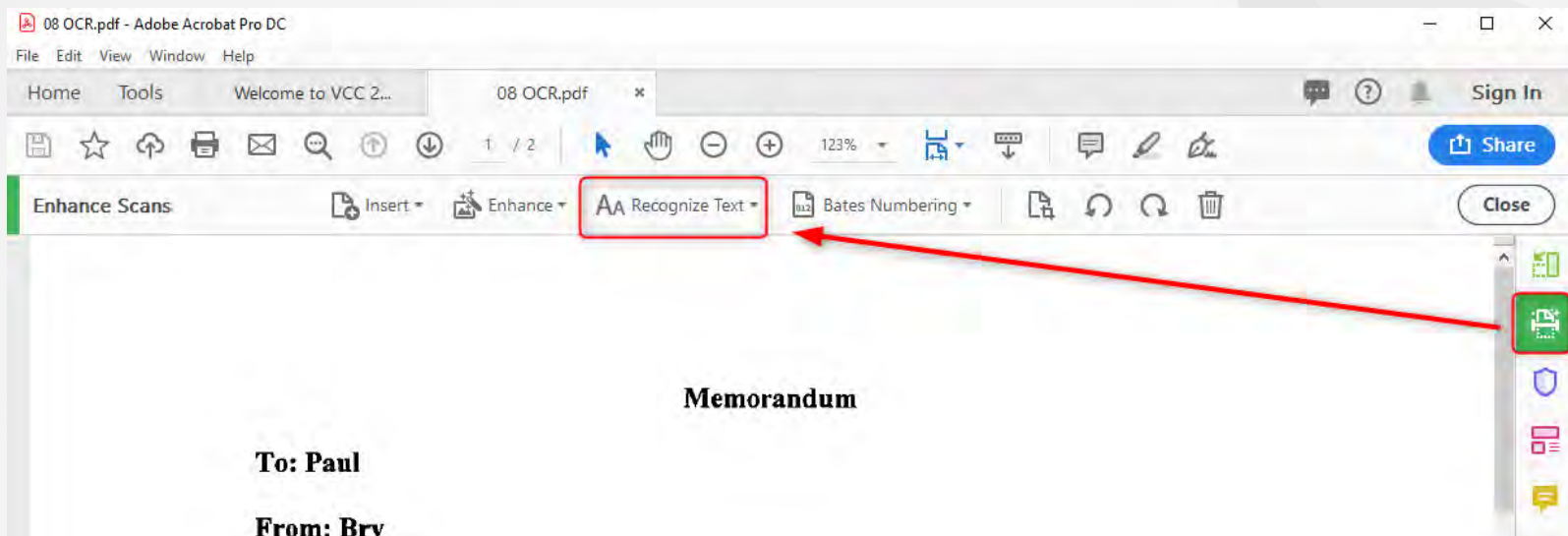


Typewriter Tool – Power PDF

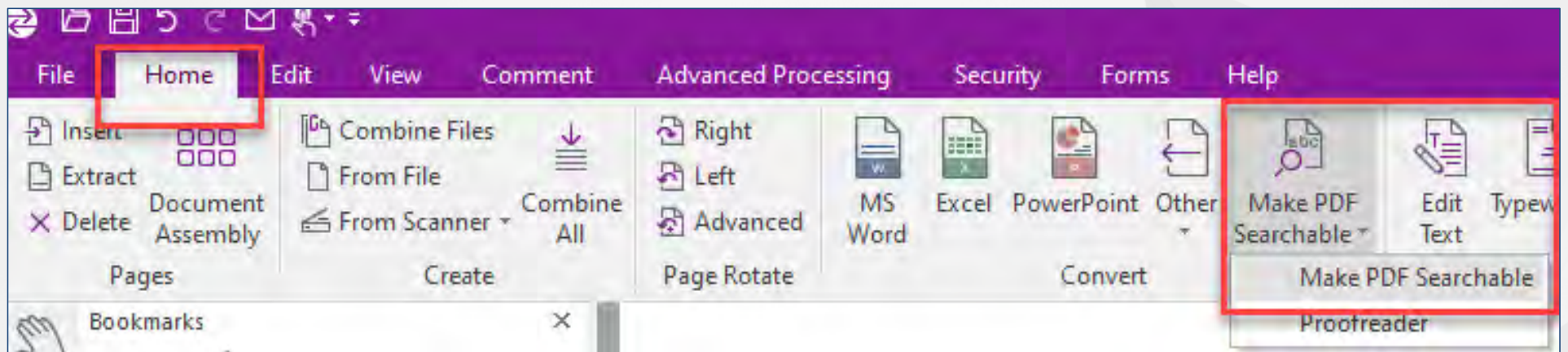


OCR – Acrobat

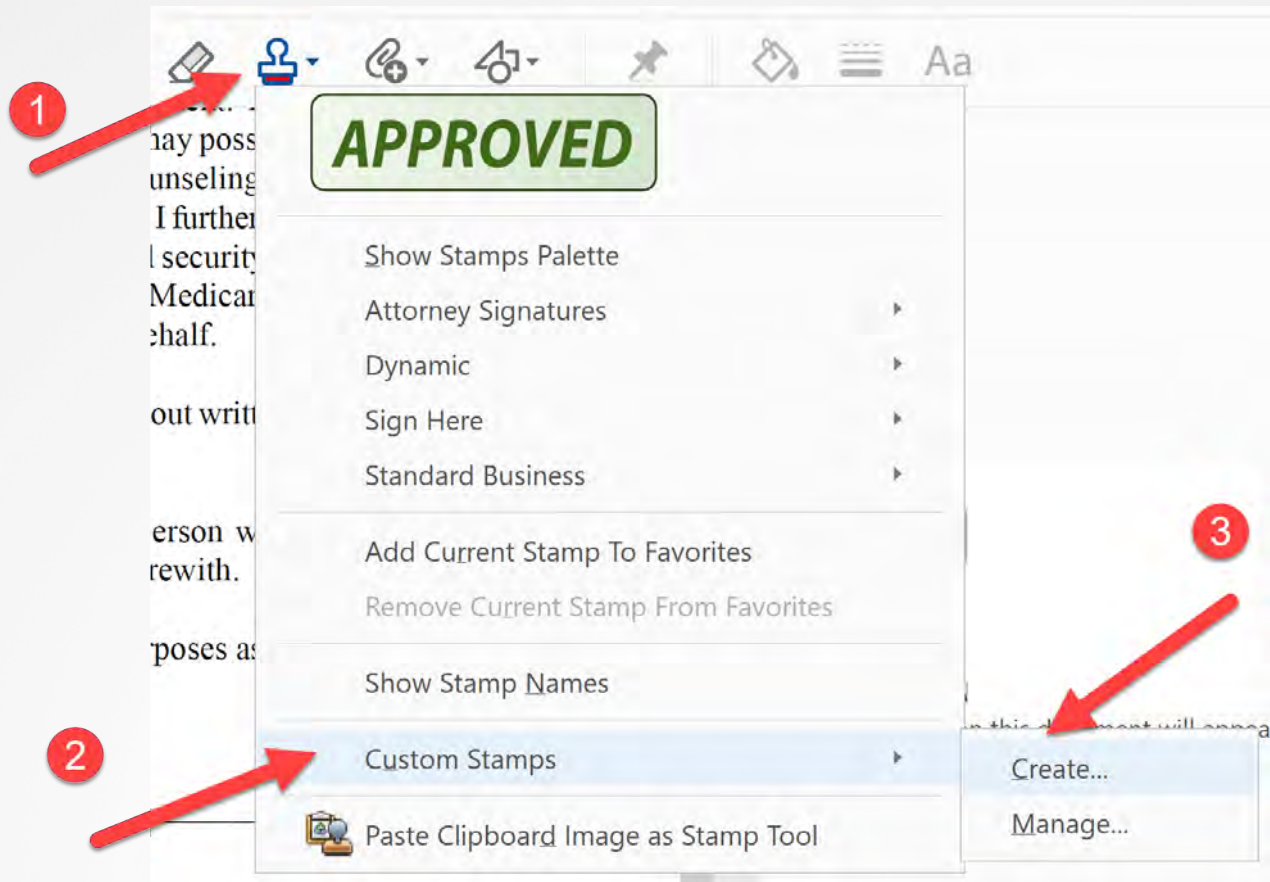
Enhance Scans ⇨ Recognize Text



OCR – Power PDF



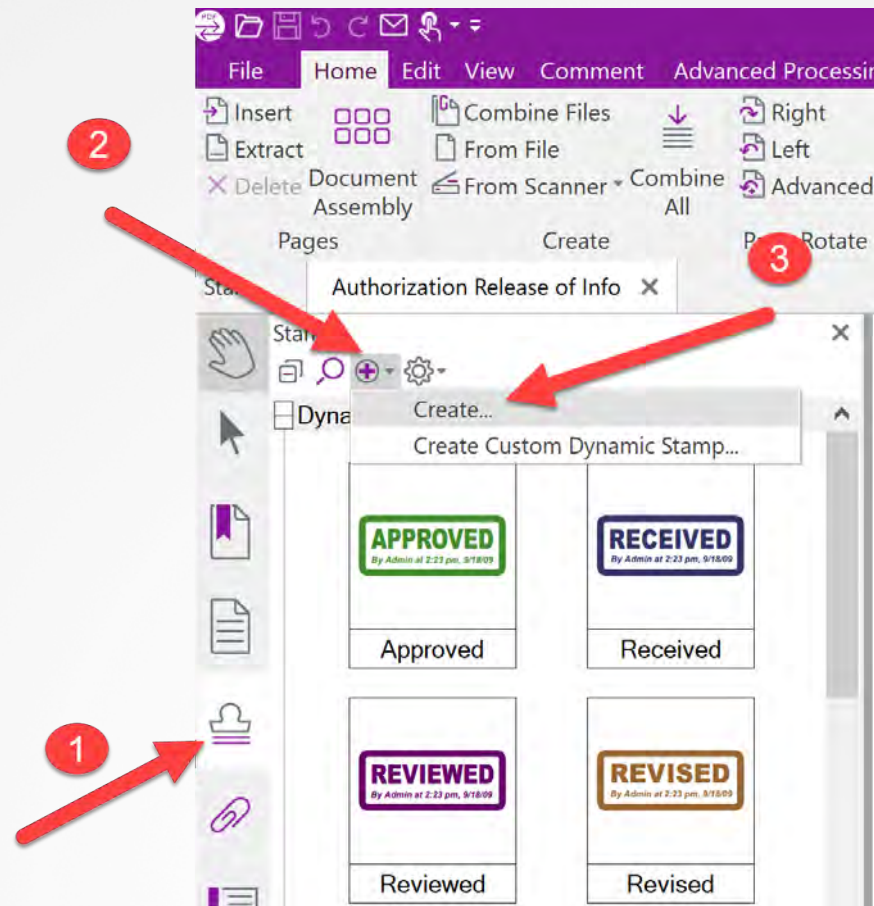
PDF Image Signature Stamp - Acrobat



PDF Image Signature Stamp - Acrobat



PDF Image Signature Stamp - PowerPDF



PDF Image Signature Stamp - PowerPDF



PDF Security - Acrobat

The image shows the Adobe Acrobat interface with the 'Protect' menu open and the 'Encrypt' option selected. A red arrow points from 'Protect' to 'Encrypt'. The 'Encrypt' dropdown menu is open, showing two options: '1 Encrypt with Certificate' and '2 Encrypt with Password', with a red box around the second option. Another red arrow points from the 'Encrypt with Password' option to the 'Password Security - Settings' dialog box.

Protect → **Encrypt**

- 1 Encrypt with Certificate
- 2 Encrypt with Password
- Manage Security Policies...
- Remove Security

1. **Reduced Size PDF:** Open the PDF you want to shrink → File menu → Save

Password Security - Settings

Document Open

Require a password to open the document

Document Open Password: [] [] [] [] [] [] [] [] [] [] Not Rated

Permissions

Restrict editing and printing of the document. A password will be required in order to change these permission settings.

Printing Allowed: High Resolution

Changes Allowed: Any except extracting pages

Enable copying of text, images, and other content

Enable text access for screen reader devices for the visually impaired

Change Permissions Password: [] [] [] [] [] [] [] [] [] [] Not Rated

Options

Compatibility: Acrobat 7.0 and later Encryption Level: 128-bit AES

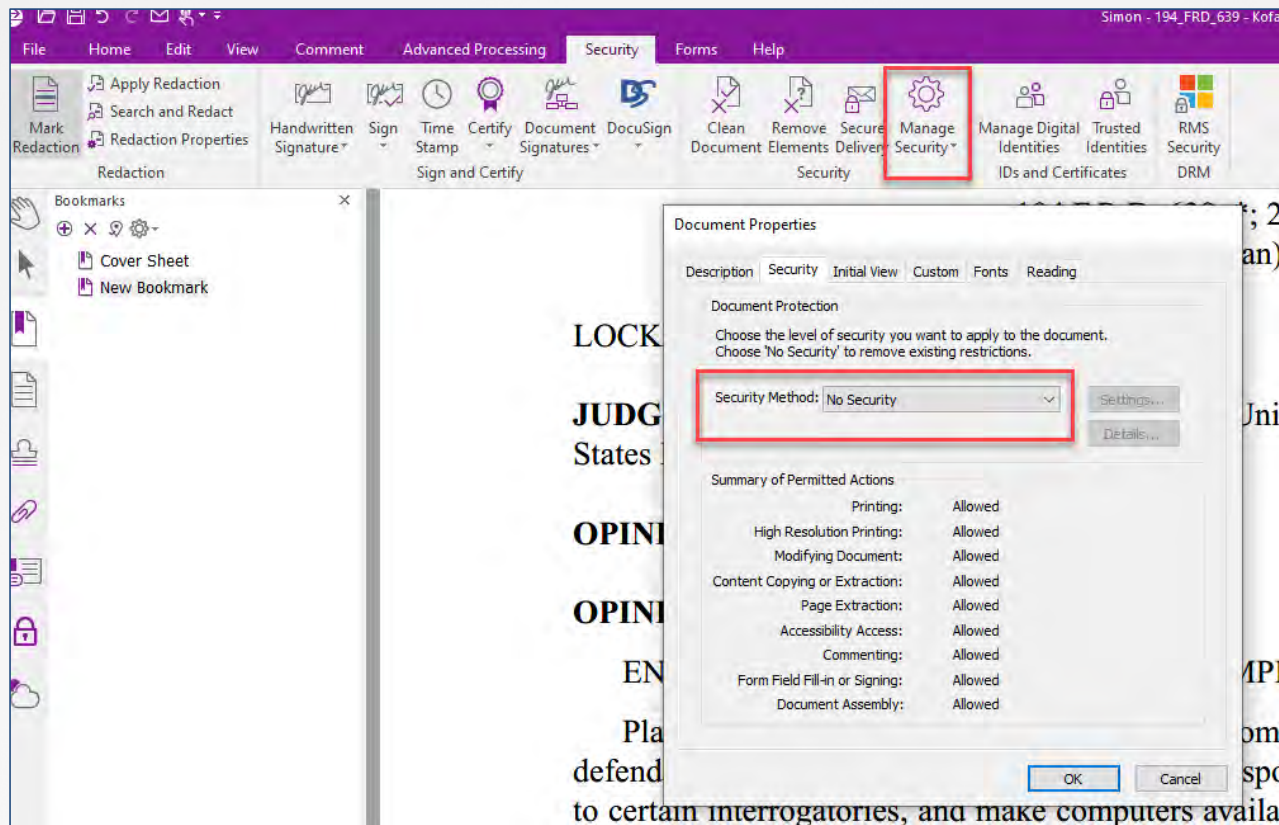
Encrypt all document contents

Encrypt all document contents except metadata (Acrobat 6 and later compatible)

Encrypt only file attachments (Acrobat 7 and later compatible)

Help **OK** **Cancel**

PDF Security – Power PDF



PDF Security – Power PDF

Password Security

Compatibility: PDF 1.5 and later (128-bit)

Encryption Level: High (128-bit)

Select Document Components to Encrypt

Encrypt all document contents

Encrypt all document contents except metadata

Encrypt only file attachments

Allow document opening only by password

Document Open Password:

Permissions

Set a permissions password to restrict editing of security settings

Permissions Password:

Printing permitted: High Resolution

Changes permitted: Any except extracting pages

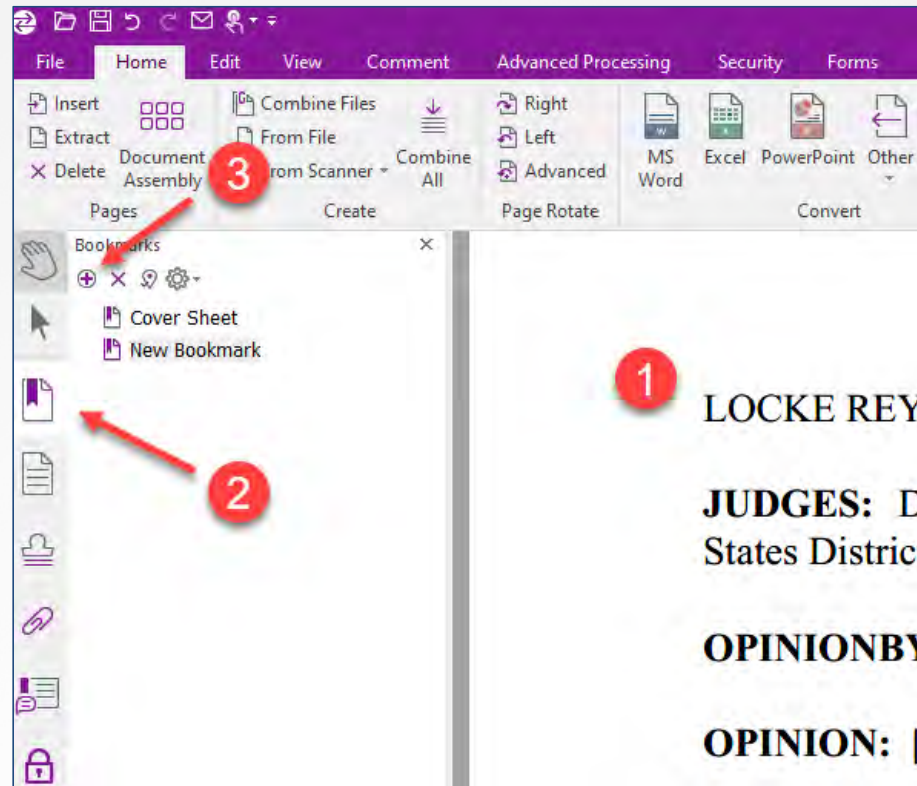
Enable copying of text, images, and other content

Allow accessibility (screen readers can access text for visually impaired)

OK Cancel

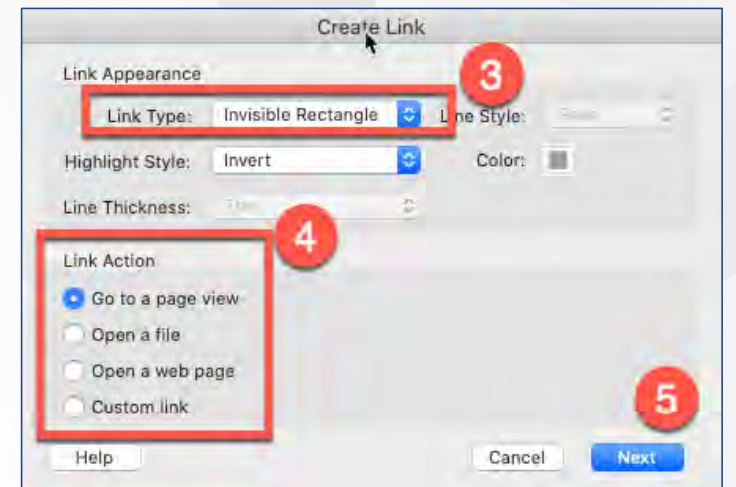
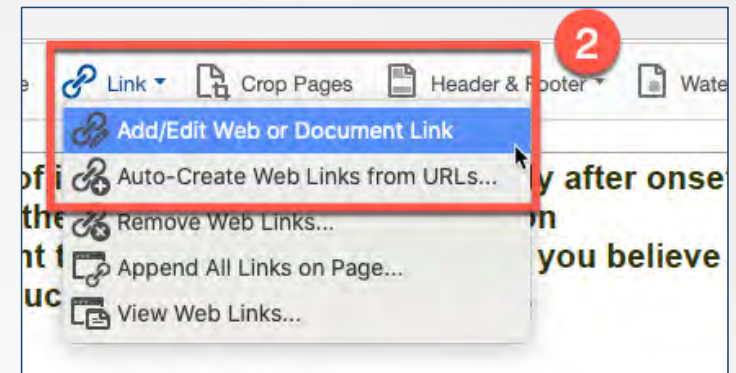
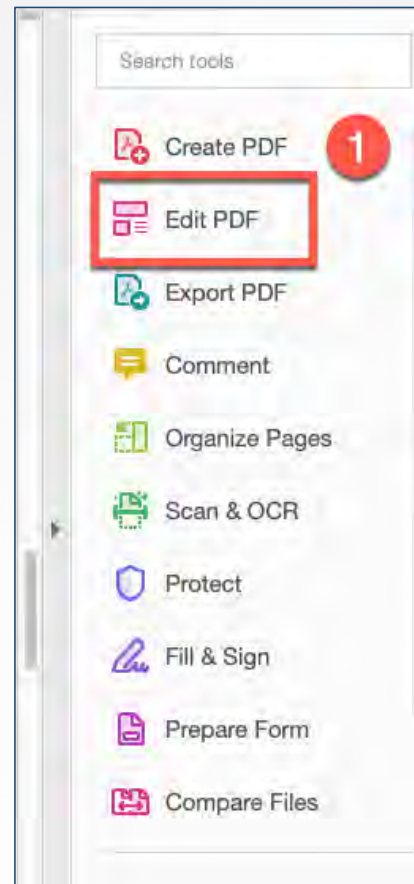
Bookmarks

1. Navigate to Desired Page
2. Turn on Bookmarks Button
3. Click New Bookmark



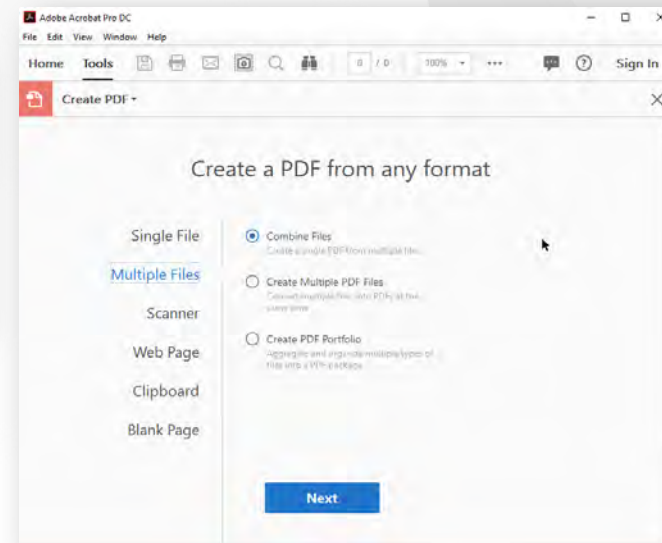
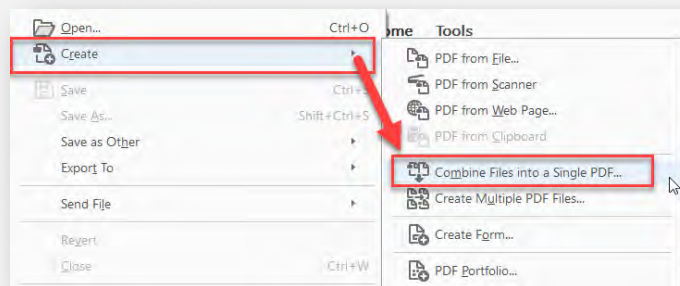
Hyperlinks in Acrobat

1. Edit PDF
2. Insert Link – Select Text
3. Set to Invisible Rectangle
4. Define the Type of Link and Location
5. Next to Finish



Create from Multiple - Acrobat

- ▶ **File->Create->Combine Files into a Single PDF**
- ▶ **Create Tool -> Multiple Files -> Combine**

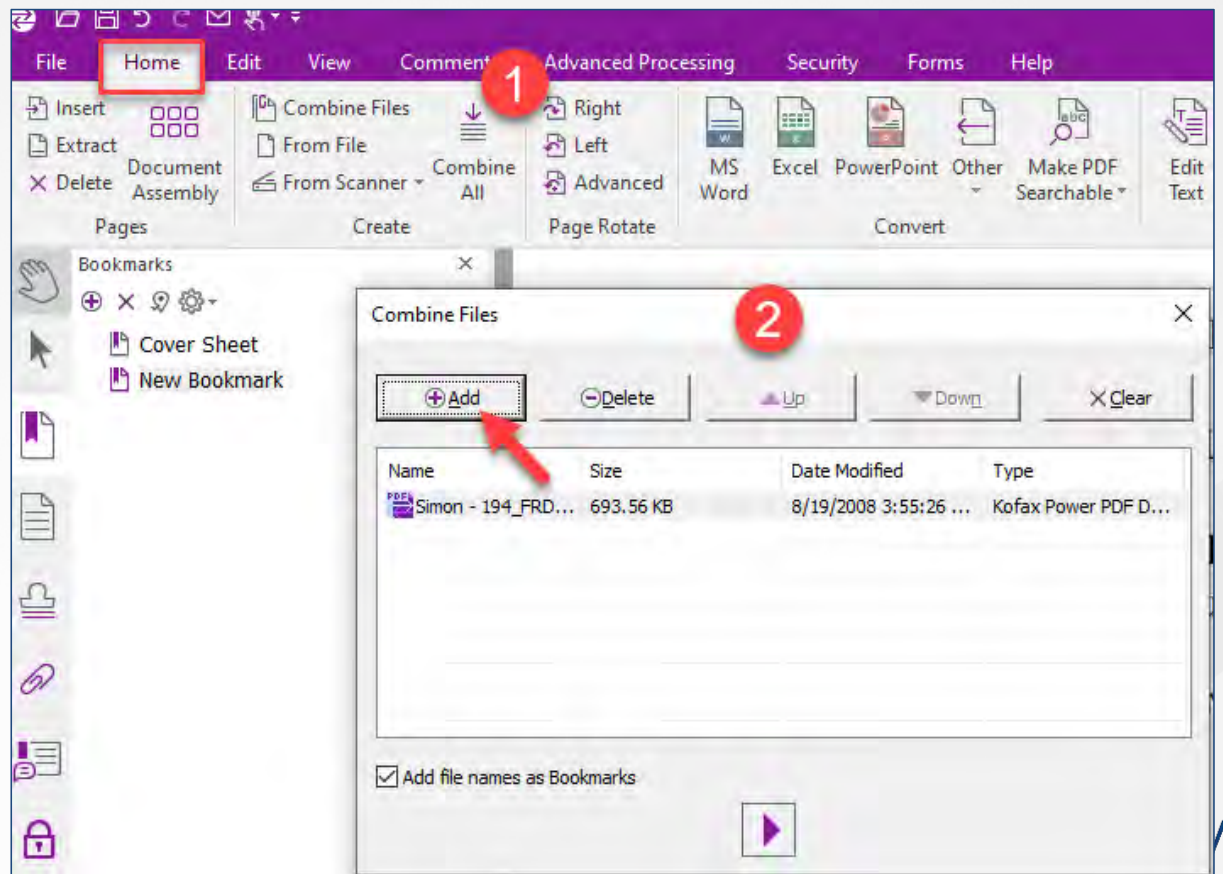


Create from Multiple Documents

- ▶ **Add bookmarks for TOC of documents**
- ▶ **Adobe will automatically convert documents to PDF**
- ▶ **If you use Organize or Page Thumbnails to combine documents, then you will have to manually insert the bookmarks.**

Create from Multiple – Power PDF

▶ **Home > Combine All**



Comments

- ▶ **Comments (Comment Tool)**
- ▶ **Shared Review (Send for Comments Tool)**
 - ▶ **Email**
 - ▶ **Shared Server like SharePoint**
- ▶ **Enable Reader for Commenting**

QUESTIONS?



Outlook Power Hour



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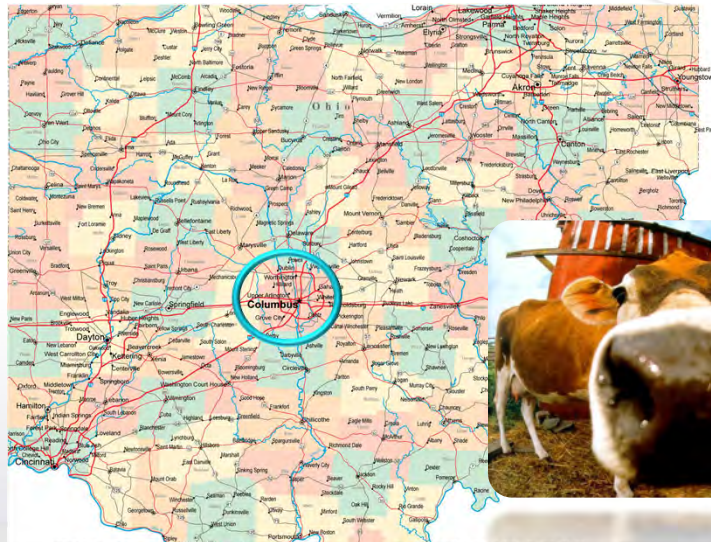
Improving the Lives of our Clients
One Efficiency at a Time

Paul





Improving the Lives of our Clients
One Efficiency at a Time



Improving the Lives of our Clients
One Efficiency at a Time



Passion - Teaching Process &
Technology to Lawyers

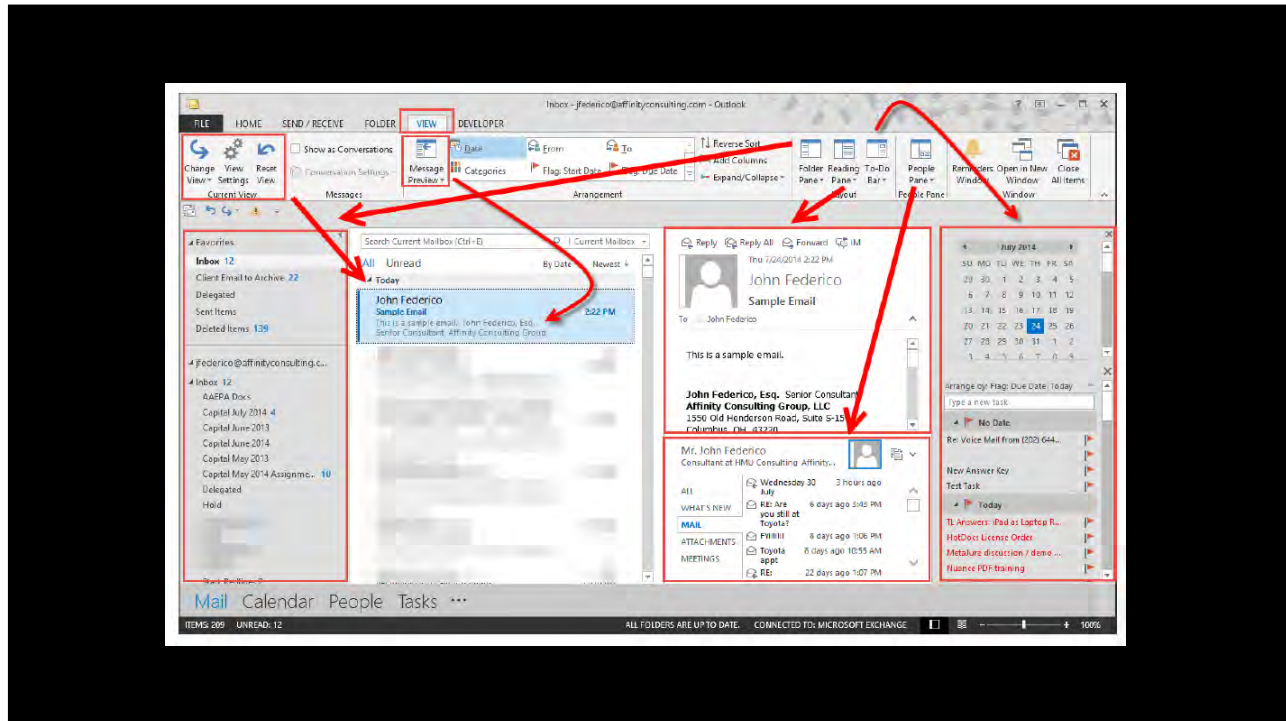


Improving the Lives of our Clients
One Efficiency at a Time



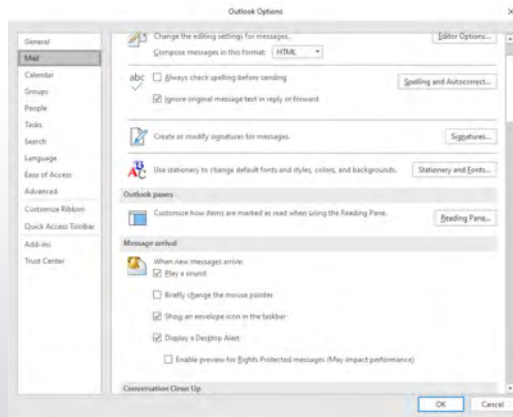
Email





Notifications - Settings

- File > Options > Mail
 - Turn off all Notifications!



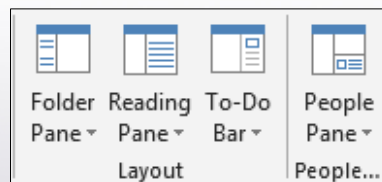
Email Rules

- Creating New
- The Rules Wizard
- Applying to Inbox
- File > Manage Rules & Alerts



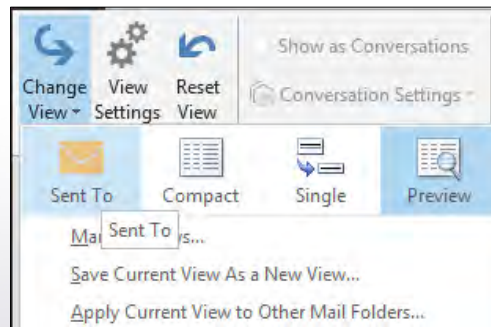
Customizing Your Inbox

- The VIEW tab
 - Folder Pane
 - Previously "Navigation Pane"
 - Reading Pane
 - To-Do Bar
 - People Pane
 - Single Line



Views

- Change View / Save View



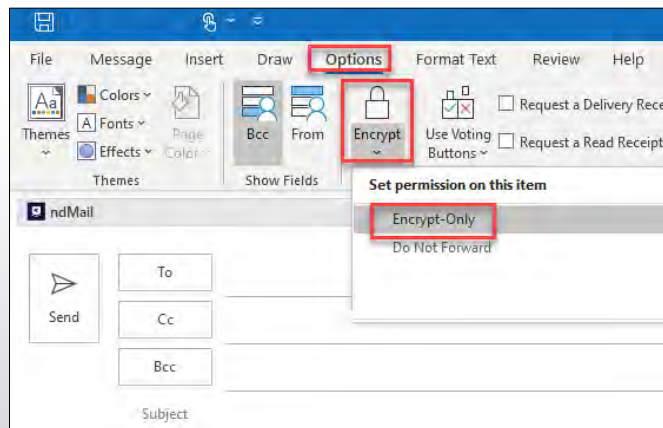
New Message

- New Message – Often Not Used Features ... Options >
 - Showing BCC line
 - Save Sent Item To
 - Delay Delivery
 - Direct Replies To

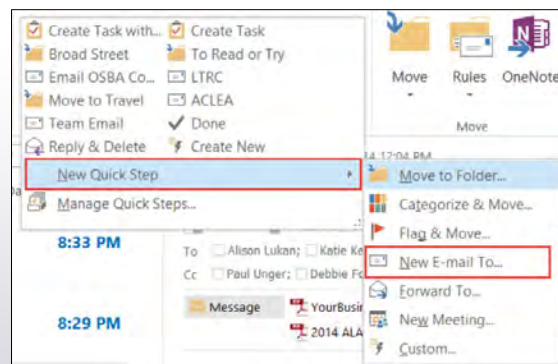
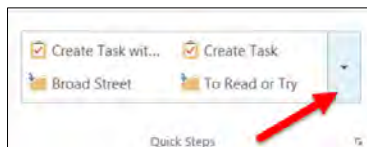


New Message

- New Message – Often Not Used Features ... Options > Encrypt



Quick Steps



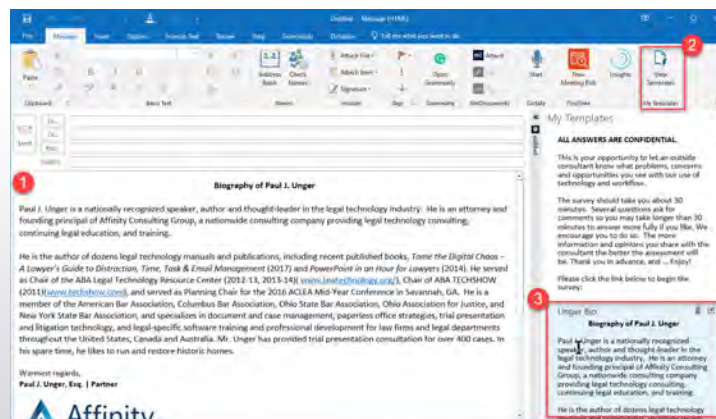
Create a Link in Email

Select Text > Right-click > Link
Paste Link in the Address field > OK



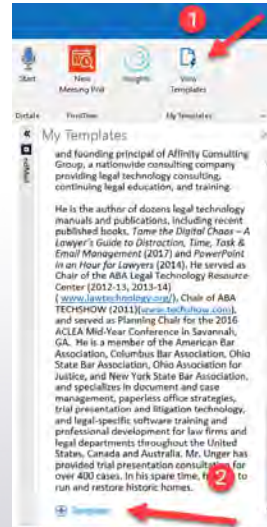
My Templates

Place cursor > View Templates > Select desired Text to Insert

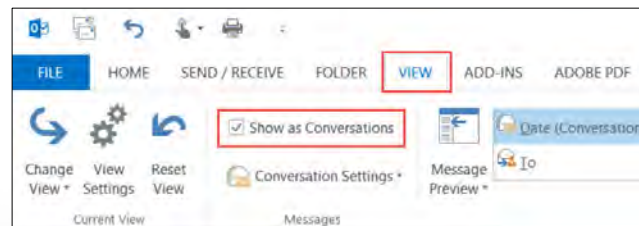


Add to My Templates

View Templates >
Add Template > Type
or Paste Text



Conversation Threads

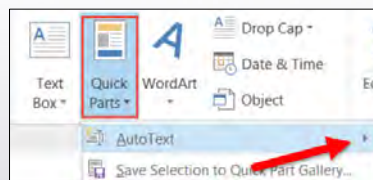


- Combines conversation threads
- Easier to process email

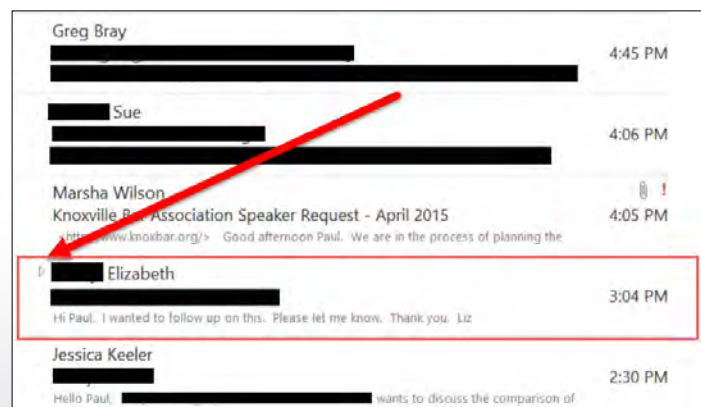
Auto Text

Copy Frequently Used Text

New Email > Insert > Quick Parts > AutoText > Save Selection to AutoText Gallery



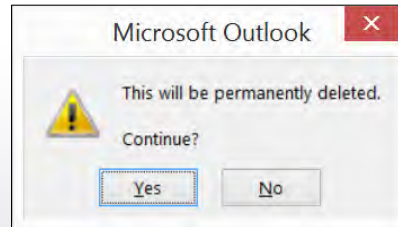
Conversation Threads



- Use the "Clean Up" to delete duplicates (on Home ribbon)

Skip Salvage




- Permanently Delete Emails – Skip Salvage
- Shift + Delete



Signatures

- Options
- New Messages and Replies

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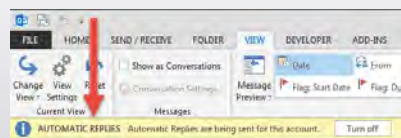
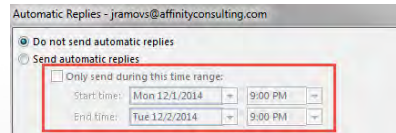
Users need TRAINING? Be sure to check out Affinity University! We have launched a new website with many helpful online classes geared toward training the legal community. Visit www.affinityuniversity.com

Law Office Automation, Business Solutions and Beyond
 Certified consultants in LexisNexis PCLaw®, LexisNexis Time Matters®, Amicus Attorney®, Worldox®, Tabs3®, PracticeMaster®, HolDocs®
 and Dragon NaturallySpeaking®

Please consider the environment before printing this e-mail

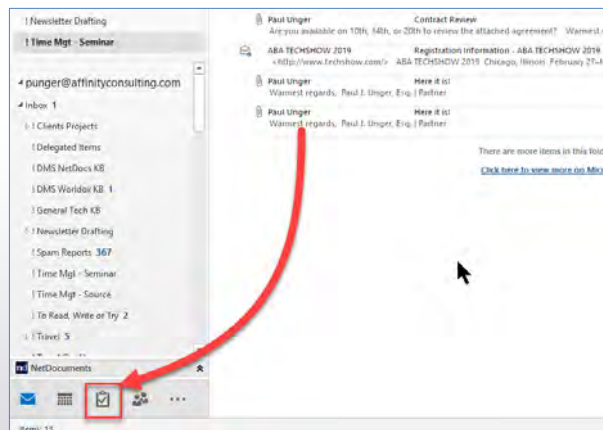
Out of Office

- Options for internal and external and
 - Warning for Hosted Exchange
- Time Frames
- Warning from Inbox



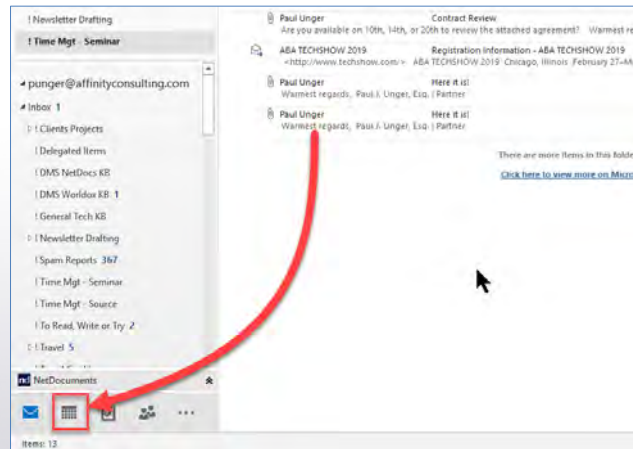
Convert Email to Task

- Drag & Drop Email to Task Icon



Convert Email to Appointment

- Drag & Drop Email to Calendar Icon



Calendar

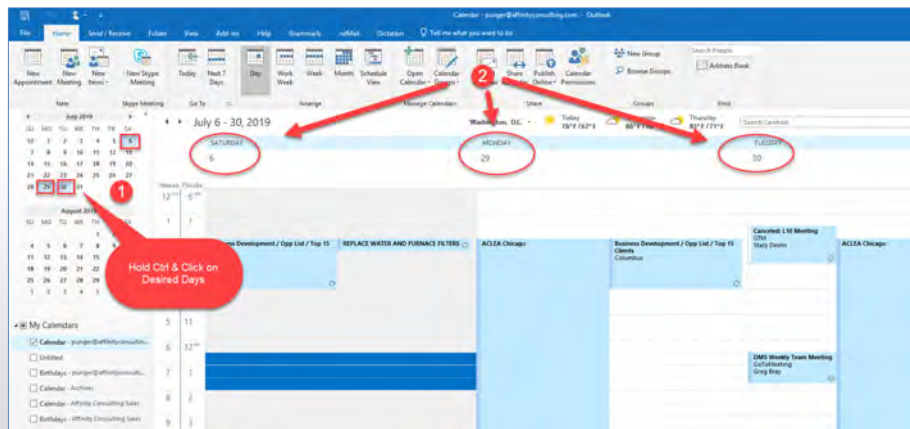


Calendar Options

- File Tab
 - Options, Calendar
 - Dialog Box Launcher (Arrange)
 - Set work day hours
 - Default Reminder Settings
 - Default Color Scheme
 - Other Preferences

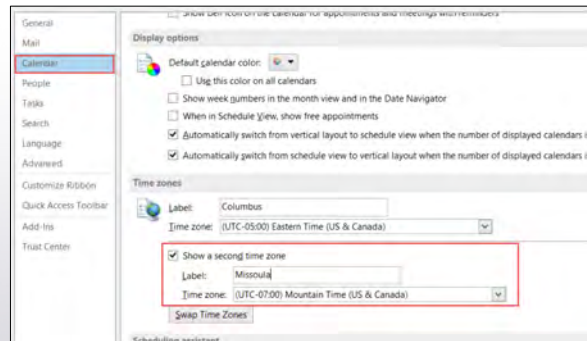
Show Non-Adjacent Days

1. Ctrl+Click on Desired Days
2. View Results on Right



Calendar Time Zones

- Multiple Time Zones
 - File > Options > Calendar
 - Show and Label



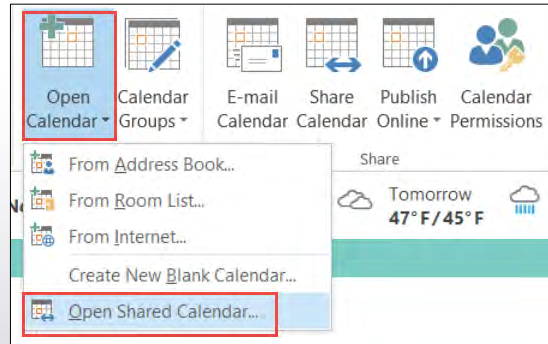
Date Calculator

- Calculating Dates (new appt + clear end time)

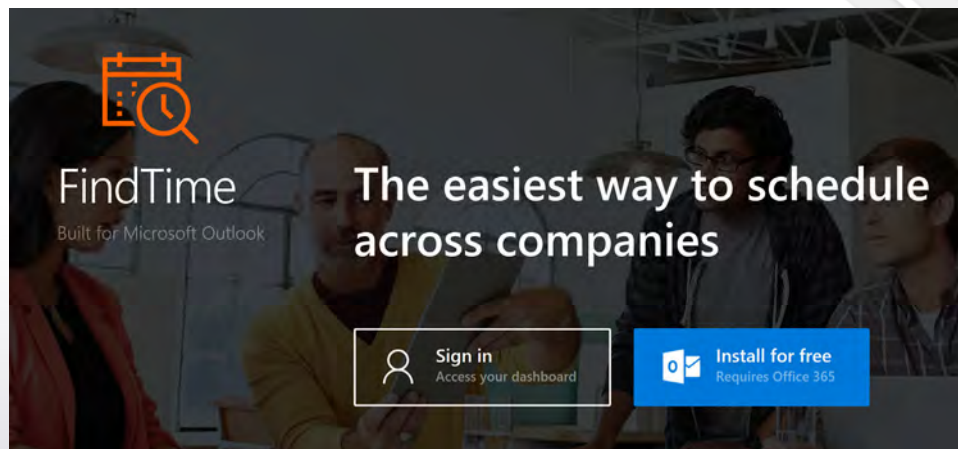
Start time:	Mon 6/27/2011	10:30 AM	<input type="checkbox"/> All day event
End time:	5d	11:00 AM	

Calendar Sharing

- Home > Open Calendar > Open Shared Calendar



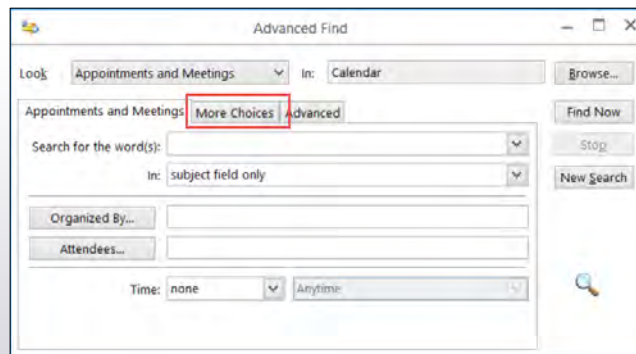
Microsoft FindTime

An advertisement for Microsoft FindTime. It features a background image of four people in a meeting. In the top left, there is an orange icon of a calendar with a magnifying glass. The text 'FindTime' is in white, with 'Built for Microsoft Outlook' below it. To the right, the text 'The easiest way to schedule across companies' is displayed in white. At the bottom, there are two buttons: a white 'Sign in' button with a person icon and the text 'Access your dashboard', and a blue 'Install for free' button with the Office 365 logo and the text 'Requires Office 365'.

<https://Findtime.Microsoft.com>

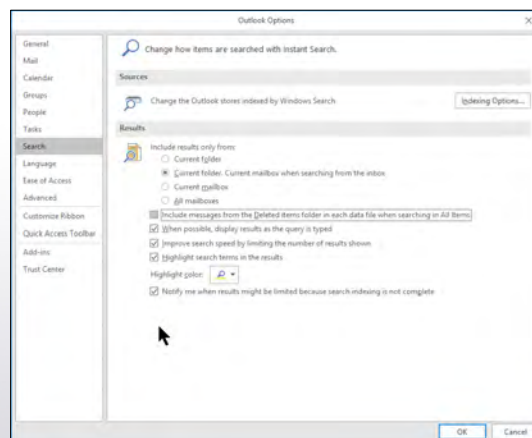
Calendar Searching

- Search – Simple Quick Search
- Advanced Find
 - CTRL / SHIFT / F



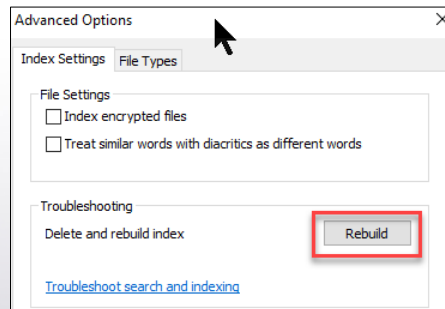
Searching Outlook

- File > Options > Search



Searching Outlook

- File > Options > Search > Index Options > Advanced > Rebuild (will take a while)



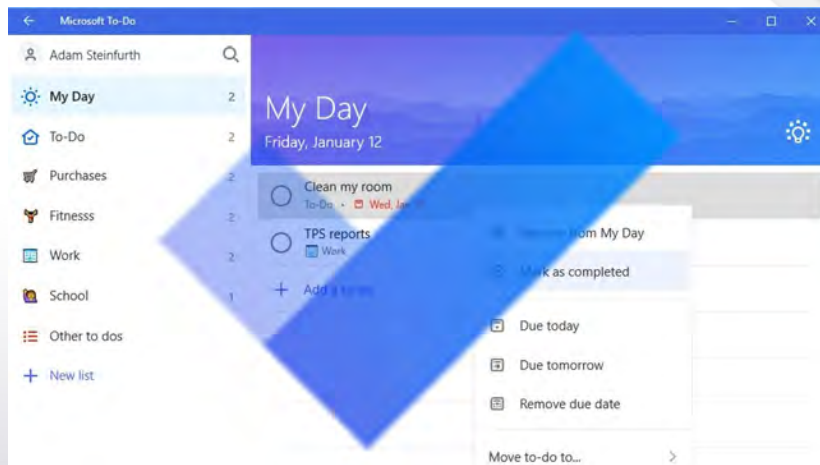
Tasks in Outlook



The screenshot shows the Outlook 'TO DO LIST' task view. It features a title bar that says 'TO DO LIST' in a blue, rounded rectangle. Below the title bar is a grid with the following columns: PRIORITY, DUE DATE, WHAT, WHO, IN PROGRESS, and DONE. The grid contains several empty rows, indicating that there are no tasks currently listed.

PRIORITY	DUE DATE	WHAT	WHO	IN PROGRESS	DONE

Microsoft ToDo



<https://todo.microsoft.com>

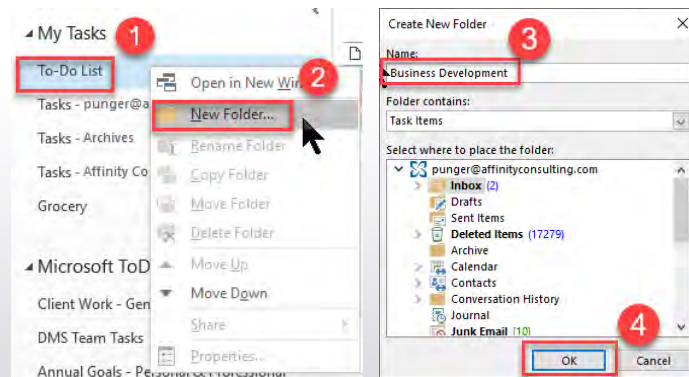
Naming Tasks

- Using Prefix (client last name -)
- Describe + Next Action

Subject	Smith - Draft Settlement Agreement	
Start date	None	Status
Due date	None	Priority
<input type="checkbox"/> Reminder	None	None

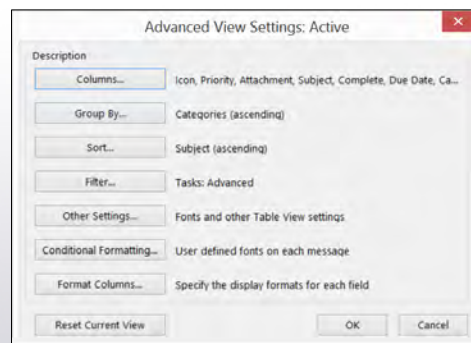
Create Task Lists

- Client – Admin – Personal – Business Dev
- Right-click on ToDo List > Create New Folder



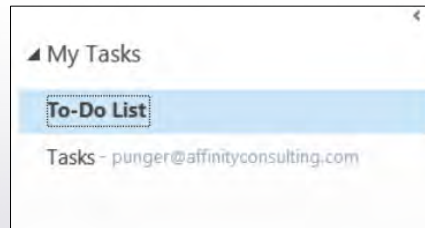
Customizing Views

- Active Only (Change View)
- Select and Remove Desired Columns
- View Settings (do last)



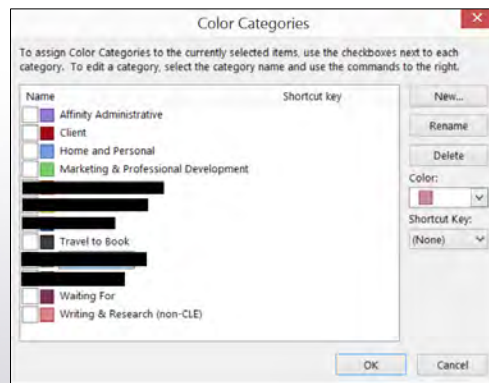
Tasks vs To-Dos

- To-Do List aggregates:
 - Flagged Emails
 - All Tasks from all Task Lists



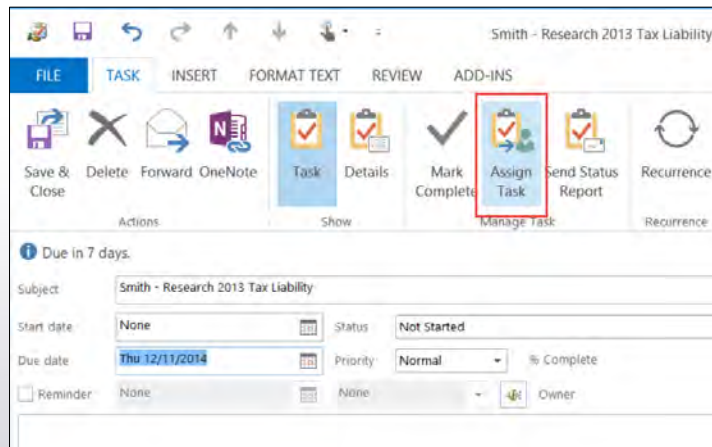
Task Categories

- Use to Group Tasks & Operate from Shorter Lists to Focus



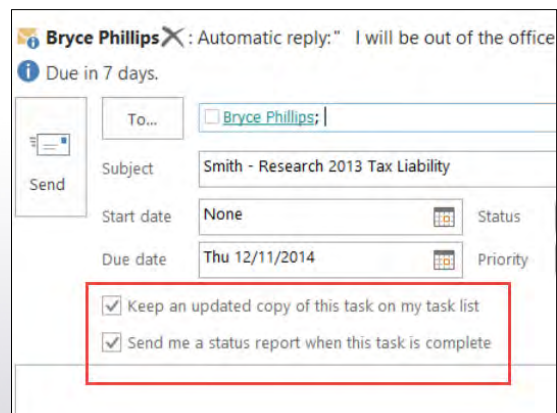
Delegating Tasks

- Delegating Tasks



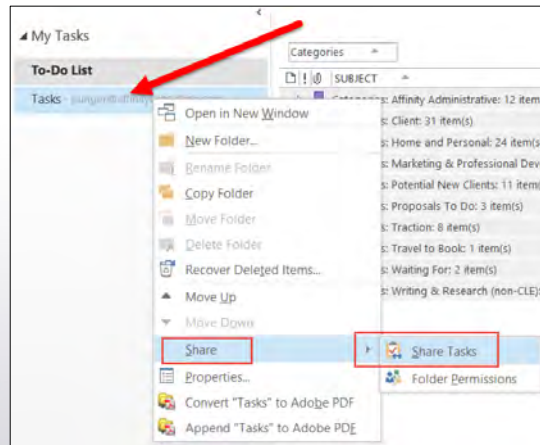
Delegating Tasks

- Delegating Tasks



Sharing Tasks List

- Share Task List with your Team



Syncing Tasks with iPhone

- Settings > Mail > Select Account (typically Exchange) > Reminders ON

