

WSSFC 2023

Technology Track – Session 3

50 Tips

Presented By:

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About the Presenters...

Jeffrey S. Krause is part of Affinity's document management team. He specializes in corporate legal department deployments and workflow design and efficiency. Jeff practiced law for two years after finishing law school in 1996, but decided technology was a better path for him. He began working for a pioneering legal technology consultancy called MicroLaw in 1998. In 2003, Jeff started his own legal technology consultancy, which he ran until 2016, when he joined Affinity. Jeff's superpower is patience, and his favorite part of his job is the satisfaction of helping someone solve one of their business problems.

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Christopher C. Shattuck is the Program Director and Legal Studies/Paralegal Program Instructor at Madison College. Previously, Mr. Shattuck managed a department and litigated cases for a creditor's rights firm in Milwaukee. He then dedicated close to six years to the State Bar of Wisconsin as their Law Practice Assistant Manager. Throughout this period, Mr. Shattuck provided over two thousand consultations, authored more than fifty published articles, and delivered over one hundred presentations, all focused on practice management, technology, and their ethical implications. Mr. Shattuck earned his undergraduate and Master of Business Administration degrees from the University of Wisconsin - Oshkosh, and completed his Juris Doctor at the University of La Verne College of Law in southern California.

Bryan Sims is a shareholder and founder of Sims Law Firm, Ltd., where he concentrates his practice in the areas of commercial litigation, civil appeals, and real estate matters. He's a member of the Illinois Bar and the Northern District of Illinois Trial Bar and is also admitted to practice before the United States Supreme Court, the United State Court of Appeals for the Seventh Circuit, the United States courts in the Central District of Illinois, the Southern District of Illinois, and the Eastern District of Michigan. Bryan is a member of the Illinois State Bar Association, the American Bar Association, the DuPage County Bar Association, and the Will County Bar Association as well as a member of the ISBA Standing Committee on Legal Technology, where he has previously served as the chair three times and the newsletter editor for 5 years. Since 2006, he has been a member ISBA Solo and Small Firm Conference Planning Committee. He is a past chair of the DuPage County Bar Association Law Practice Management





Jeff Krause	PRACTICE LAW. MANAGE BUSINESS. ENJOY LIFE.
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Jeff Krause's Tips

K.1 Scribe https://scribehow.com/

Over the years, I and many others have stressed the benefits of process mapping and documenting procedures. Scribe lets you capture any process as you perform the process. Simply turn it on and go through the process. For example, turn it on, open Clio and go through the steps of adding a new client. Scribe automatically creates a step-by-step guide. Once created, you can go back and customize then share your guide. Free to try and test. Personal plan \$23 per user, per month. Team plan \$12 per user, per month (min. 5).

K.2 Fathom AI https://fathom.video/

Fathom AI is your AI virtual meeting assistant. Fathom automatically records, transcribes, highlights, and summarizes your meeting. While that might sound like something Zoom does on its own, Fathom goes much further by providing advanced editing. For example, you can highlight a portion of the transcript and Fathom will automatically find the matching portion of the meeting video and copy that portion to a separate sharable video. Free for individual use. Team plan provides advanced features for organizations such as CRM sync, Single Sign On, etc. for \$29 per user, per month.

K.3 Windows Camera App

Have you ever joined a web conference only to find out your hair wasn't quite right, something was in the background or you were sitting in the wrong position? You don't have to wait for your next meeting to test your camera. Simply use the built in camera app in Windows 10 or 11 to preview what your camera will reveal to the world in your next web meeting.

K.4 Automatically Reopen Closed Browser Tabs

You finally found the website and specific page you have been looking for. Then, you had a momentary lapse and closed it before you were finished. Simply go back to your browser and select Ctrl-Shift-T. If you never fully exited your browser, this reopens the most recently closed tab. If you accidentally closed your browser completely, this reopens all tabs that were open when you closed it.

K.5 Experiment with ChatGPT

If you have never tried ChatGPT, try it. If you have tried it, experiment with some of the things it can do. Recently, I had to analyze raw survey data from 200 respondents. Many of the survey questions allowed free form comment type answers. I was faced with the prospect of reading through 200 responses to 10 different questions and then trying to summarize those 2000 answers. On a whim, I tried ChatGPT. I asked it to "Summarize in ten bullet points the information I am about to paste." I then pasted the raw data from Excel into the app. Within 30 seconds, I had the top ten themes that appeared in the responses. Of course, I checked it for accuracy. When I found out that it had done a great job, I was able to save myself at least 10 hours that I would have spent reading through and summarizing everything on my own.

K.6 Windows Dictation

Windows 10 and 11 include a dictation feature. This feature has been around for a while but, prior to the pandemic, not everyone had access to a decent microphone. Now, most of us do thanks to Zoom meetings. To access dictation, look for the Dictate (microphone) icon or select the Windows key and H. It works surprisingly well.

This is a simple dictation using my desktop speaker phone to dictate. I promise I have not made a single correction in this dictation. Although, a few simple tricks like speaking the punctuation definitely help.

K.7 Calendly (https://www.calendly.com)

Calendly (or Bookings) has certainly been a tip before, but I wanted to remind everyone as well as provide some examples of how our team is using Calendly. Calendly integrates with your Outlook calendar and allows people to schedule meetings with you. You have complete control over when and how they schedule. For example, you can provide a buffer before and after other meetings, set working hours, etc. You can also create meeting link templates. The links generated by these templates can be of different lengths, include information about the meetings and even include specific meeting attendees. Calendly also integrates with Zoom, allowing you to embed a Zoom link into meetings as they are scheduled. Combine all of this and you can create meeting templates for varying lengths of time, for specific matters and include your assistant, the client, or anyone else involved in the matter.

K.8 Generating PDFs (When Size Matters)

The size of a PDF can vary greatly depending on the application you use and the settings within the application. The problem is that you don't always have control over the settings. Even using the same application in different ways can use slightly different settings without your knowledge. For example, Windows Publish to PDF and Windows Save As PDF will produce similar sized files that are among the smallest PDFs while Windows Print to PDF will produce one of the largest PDFs. Even Acrobat will produce a slightly larger file when Print to PDF is used rather than Create PDF. Why?

Among the settings that cause PDF sizes to vary are color. Black and white is by far the smallest while color is the largest. Interestingly, gray scale is not much smaller than color. Another setting that can cause PDF sizes to vary is how many fonts are used and whether they are embedded. These settings are typically part of the preferences for the various ways you create PDFs.

It turns out that "Publish" and "Save" use different settings than "Print." Specifically, Print is more likely to embed fonts. Unfortunately, you don't have a lot of control over these settings when using the default Windows functions. With Acrobat, Kofax, or Foxit you have more control, but you still have to make sure the appropriate settings apply for the different generation methods.

K.9 Laptop Cooling Pads

All computers run hot, but laptops present special problems. First, their small form factor means that air cannot circulate around them very well and there is no room for the type of box fans that cool desktops. Second, whether they are sitting on a desk or your lap, they tend to warm up the surface they are on. Unfortunately, when your laptop is overheating it will slow down and the fans it turns on to cool itself slows and it down further.

You can avoid some of these issues with a cooling pad. A typical cooling pad includes three to five LED fans (many colors available) and enough room for the air to circulate beneath the laptop. They power from a USB cable connected to the laptop but draw minimal power. Most also include some method of elevating the rear of the laptop to make it easier to type. The best part is that they are very affordable.

K.10 Ramp Corporate Credit Cards (https://www.ramp.com)

Using a credit card for a business transaction is so much more than simply pulling out the card or entering it online. The transaction needs to be accounted for properly. Was it a client expense? For which client? Was it an office expense? For supplies or for your practice management subscription? What about the receipt? Add more than one user to the card or more than one physical card and you have just increased the bookkeeping headaches. Even harder to manage are purchases that are not made on the company card and need to be reimbursed? Ramp makes all of this much easier.

Ramp offers credit cards with business in mind. Whenever a transaction is made on a card, you are immediately reminded to submit a receipt (by taking a picture with your phone). Ramp will attempt to classify the transaction based on previous ones and allow you to classify manually if its automatic classification is incorrect. Periodic reminders tell you which transactions are lacking a receipt or any other needed information. All of this integrates with popular accounting systems like QuickBooks to classify and track everything. The result? You don't have to spend hours tracking down and reconciling everything.

K.11 Turn Your Photos Into Art with BeFunky (<u>www.befunky.com</u>)

You have probably taken some great photos over the years. While they look great in frames or on the wall, you can turn them into works of art with a service like BeFunky. With BeFunky, you upload your favorite photo and apply one of dozens of AI powered filters or overlay. The free plan allows you to experiment with the various tools while the paid plan (\$70 per year or \$12 per month) provides additional tools and allows you to save your works of art. If this sounds expensive, consider that an Adobe Photoshop subscription starts at \$21 per month. Also consider how many works of art you can create in a year. It's easily enough time to redecorate your office or another room.

K.12 Gaming Gear for Macros and Quick Commands

Gamers who play Massive Multiplayer Online (MMO) games need to be able to fire different weapons or cast different spells with a single click. There simply isn't time to scroll around, identify and click on an icon somewhere on their 30-inch monitor. To avoid this, they use keyboards and mice that have multiple buttons or hotkeys, and they code the buttons to do different things with a single click. While you might not "die" while searching for the right function in Word, you can apply this same technology to quickly switch tabs, insert a bulleted list, insert a link, or format a table of contents. All you need to do is walk through the steps once with the mouse or keyboard in recording mode. Gamers are often at the cutting edge of technology and even luddites can learn something from them.

K.13 Office Ambience While Working at Home?

(https://soundofcolleagues.com/)

Is the peace and quiet of working at home getting to you? The Sound of Colleagues project will replace the silence with the background noises typically found in an office. The sounds will gently cycle through everything from people talking in the hallway, the coffee machine, keyboards clicking or printers printing. If nothing else, try it for a reminder of what you are (not) missing while working at home.

K.14 Store Loyalty Cards Used to Be a Hassle

Every store or shop seems to have a loyalty program these days. The problem is that your wallet cannot possibly fit all of them. Even if it could, trying to find the one you need when you need it would be a problem. You have two options: 1) don't use them or 2) figure out a way to carry all of them with you in an organized way. Stocard is the answer. Stocard lets you scan or input all of your loyalty and membership cards in a single app. It already integrates with common loyalty programs like Starbucks and CVS but, if you have a card from a local business, you can also enter those. Get those reward points and discounts you deserve! Key Ring is another option. Download either app from the Apple or Google Store.

K.15 Need an Aux Output and a Charger?

I'm the first to admit that, like me, my car is a dinosaur. Unfortunately, the last time I upgraded my phone I lost the aux output that I used to connect to my car's sound system. Yes, they make adaptors but then I am using the only output on phone for sound rather than charging. Turns out there is an adaptor for that too. ZooAux and several other brands will split the USB C from my Android phone to separate Aux and USB C signals allowing me to connect to the aux jack in my car and my cigarette lighter based USB charger. Yes, my car is that old. The bigger point is that there is a gadget for everything.

K.16 Delay Email Delivery

There was a time when sending an email at 11 p.m. impressed people with your work ethic and dedication. These days, it tells people that you are not efficient enough to get your work done during

reasonably normal work hours. Outlook's delayed delivery feature will save the email and offer to deliver it first thing in the morning during normal work hours. You can also use this feature to remind yourself of something first thing in the morning. After all, what is the first thing we all do when we sit down at our desk in the morning.

Nerino Petro's Tips

P.1SpellBook. https://www.spellbook.legal/

While products like ChatGPT are general purpose AI, legal specific AI products that look for conflicting clauses, missing terms, insights and redlining on the market. SpellBook is an AI tool that uses GPT-4 to review and suggest language inside MS Word for your contracts and legal documents. Case databases, form libraries, statutes and more are used to training SpellBook for its legal specific capabilities.

P.2Ditch LastPass.

Myself and others advocated that attorneys use LastPass for their password management. That is no longer the case: after a serious data breach, the way the company mishandled that breach and advising its customers, Lastpl can no longer recommend LastPass. It should be replaced by a product with a better track record. Products like Keeper, Dashlane, KeePass, Bitwarden and Nord Pass to name a few. Check out articles such as The best password managers in 2023 from Tom's Guide https://bit.ly/3lXpcH9 or The best password on zdnet.com https://zd.net/3rs9BGO

P.3Microsoft Power Toys https://bit.ly/3tkOE0K

Power Toys is a set of free utilities from Microsoft that lets you fine tune and tweak how Windows appears and works on your computer beyond what is normally available in a stock Windows installation. These include Fancy Zones to create custom window layouts especially on wide monitors; Always on top to pin windows so they are always on top of any other open windows; File Explorer add-ons, color picker and many more are part of this great set of utilities. .

P.4Outlook Conversation Cleanup. https://bit.ly/3RFDxts

Threaded messages can make following an Outlook conversation easier, but it can also become tedious due to the redundant messages that appear over and over again as you scroll. Get rid of all of the redundant messages in a thread by using the Outlook Conversation Cleanup tool. Check out instructions from Microsoft https://bit.ly/3RFDxts and How to Streamline Conversations in Outlook from LifeWire.com https://bit.ly/3LINdQ5

P.5Thrifty texting for your office.

More and more clients prefer receiving reminders and information vias text rather than email. While there are services at you can pay for to allow texting from your computer, a less expensive way is to purchase an inexpensive cellphone and make that your office "text" number. You should always include language in your fee agreement that allows you to communicate with text if you want the capability by your client so you do not run afoul of Wis. Stat. s. 100.52(1)(i) and Wis. Adm. Code ch. ATCP 127. These protect cellular phone numbers from unsolicited text messages.

P.6Quit retyping text that has the incorrect case.

If you are like me, too often I realize after I STARTED TYPING THAT I HIT THE Cap lock key not the Shift key to capitalize the first letter of the sentence. Or perhaps you hit the Cap lock key, then hit shift so the FIRST LETTER IS LOWER CASE AND THE REST IS UPPER CASE. In the past, I would delete what I had typed and then start over. It turns out you don't have to retype anything – just use Word's Change Case option. Select the text that needs to be changed and the, hold down the Shift key while

pressing the F3 key to toggle between the change case options . You can also use the Fonts Command Group in the Home tab in the Ribbon as detailed in Deborah Savadra's article here $\underline{\text{https://bityl.co/93R9}}\text{ . Use the Change Text Feature ion Word }\underline{\text{https://bit.ly/3zFjixX}}\text{ and Outlook }\underline{\text{https://bit.ly/3rxOx1q}}\text{ to correct the case of your text.}$

P.7Meeting Owl Pro. https://owllabs.com/

With the continued use of video conferencing for meetings and hearings, you need to make sure that the other parties and the court can see you and the other parties at your location. Investing in a simple to use video conferencing system that works with MS Teams, Zoom and GoToMeeting, etc. will be money well spent. While costing around \$1,000.00 the meeting Owl pro or similar all in one camera and speaker phone systems give you an easy to use, high quality conferencing solution that will take your conferencing to the next level. An alternative is the EMEET Meeting Capsule https://bit.ly/3RBX6D6. See The best conference room webcam in 2023: conferencing cameras for groups from Digital World Camera https://bit.ly/46x9eJH.

P.8BOOX Tab Ultra C e-paper tablet. https://bit.ly/3LJY9gq

As ePaper tablets continue to gain popularity, Onyx, the makers of the Boox family of ePaper tablets introduced the Tab C Ultra. Sporting a 10.3 inch HD color ePaper screen, running on a newer version of Android, and capable of running apps from the Google Play Store, link to online storage (including Google Drive and Dropbox), popular eReader software from Kindle and Nook, and what you get is a capable tablet with terrific hand writing note capabilities. For those ghat prefer taking notes by hand, ePaper devices represent a hybrid of analog and digital that combines the best of both worlds for many users.

P.9Back it up!

Equipment failure, theft, human error and nature are all reasons that you want to back up. But scarier still is ransomware. When, not if, you get hit with ransomware, your only option is to restore from a backup unless you want to pay and gamble you will get the decryption code. The problem with many backup systems and methodologies is that they rely on mapped or UNC shared drives. Ransomware will encrypt not only your drives on the computer but any mapped or shared resource as well. If you are using removable media such as external drives, you need to remove them daily so you have an "air gap" between the backup and the system. Better yet is to find a chainless backup system that doesn't require mapped or shared resources making it less susceptible to ransomware. There are options now that will do this directly to the cloud without requiring a physical backup appliance. However, a physical appliance will often allow you to spin up a virtual version of your system while you restore everything. This type of backup is usually provided though an IT company from companies such Axcient. You can also use Network Attached Storage (NAS) devices such as Synology and their Active Backup service which also includes the ability to backup Microsoft 365. Companies such as iDrive https://www.idrive.com/, Backblaze https://bityl.co/935k, and Carbonite https://bityl.co/93Sm also offer backup options that can provide similar protections directly to you. There are numerous options, but in the end, you just NEED TO BACKUP!

P.10 Hack GMail for filtering and identification.

Gmail provides two ways for you to filter and sort messages that appear to be a new email address but which still come into your regular Gmail inbox. Take a regular Gmail address such as joesmoth@gmailcom and Insert a "." between joe & Smith so it appears as joe.smith@gmail.com It now appears that it is a new email address but Gmail ignores the period. However, this scan be useful for filtering messages. If you want to know which websites or vendors may be selling or using your email address, use Gmail's Plus Addressing feature. Add a "+" after your user name in the address and follow it by a word such as website or vendor name. It will still come into your Gmail iinbox, but if you start getting s number of emails showing that s your From address, you will know who the cuporit is for doing so. For example joesmith+cnet@gmail.com or hiediklume+wisbar@gmasil.com. You can also use this to filter emails as well. Some sites will also allow you to create multiple user logins by using the Plus Addressing hack.

P.11 Get a notebook USB Hub or expansion/ docking station.

As our laptops get smaller, the number of ports to connect external devices like a moiuse, keyboard, drive, printer, etc. become fewer and fewer. Get your self a USB Hub to carry with you. Consider getting the same or a more capable one that you can leave at your home and, office or whereever else you use your laptop. For one portable option, check out https://amzn.to/3olbAR6. For one to leave at your deskp, check out models like the UTECH 15 in 1 with SSD enclosure to not only dock your laptop but to provide additnoal storage. https://amzn.to/3LKgSIR

P.12 OneTastic for OneNote. https://getonetastic.com/

Microsoft is finally taking OneNote back to its roots and getting rid of the so called OneNote for Windows 10 app (think of it as OneNote lite) https://bit.ly/45gpYDV. For OneNote Power Users (or if you want to become one) check out the OneTastic free and paid add-in for OneNote. It adds multiple features to OneNote including Macros, OneCalendar, Find and Replace, Favorites, Select text from Image (unlike the existing feature that copies ALL text, this just copies the text you select), and more.

P.13 Better drafting with Wordrake and Briefcatch.

https://www.wordrake.com/ and https://briefcatch.com/

Tools that help you draft better documents, faster can not only save you time, but money in the long run as well, even if they are paid tools. Apps such as Wordrake which provides automated inline editing inside Word documents and Briefcatch which uses Smart Technology to check citations, catch typos, streamline and modernize legalese. Bottom line, these tools help you on what you are saying rather than you focusing on how to say it.

P.14 Use a smart plug to restart your router.

Nothing like being on a call with your Internet provider for troubleshooting and they ask you if you have restarted your modem or router. Usually these devices are in some other part of your house or office and you have to go there and plug and unplug them. Make it easy to power these devices on and off from you smartphone or tablet using a Smart Plug such as these from Kasa https://amzn.to/3RDtyVI You can set a schedule to do this automatically for things light lights,

external hard drives, or other appliances. These are also useful for devices that do not have an Off/On switch that you do not want to have to plug and unplug them each time you go to use it.

P.15 Stop OTPs from filling your Galazy Pone Inbox

One Time Passwords (OTPs) are ubiquitous now for 2FA to our phones. But how do we keep them from piling up in our Messages? For Andoird users that also use Google Messenger for messaging, you can set it to automatically delete these OTPs after 24 hours. Set it and Forget it! https://bit.ly/45gxUoH, https://bit.ly/45gxUoH, https://bit.ly/3rFb2BJ and https://bit.ly/3rFb2BJ and https://bit.ly/3rFb2BJ and https://bit.ly/3rFLW5F

P.16 Clipboard managers for Windows.

Copy and paste is one of the most used features in our various programs; unfortunately, most users only scratch the surface when it comes to the built-in tools we have, or taking advantage of third party Clipboard Manager add-ins that can take Copy and Paste to the next level. The next time you are in Word and on the Home tab, expand the Clipboard group by clicking the launcher icon in the lower right corner (See https://bit.ly/3RKzKuZ for how to do this and see https://bit.ly/3ZF6aJk for setting options). If you really want to expand your Copy and Paste functionality, look to one of the many Clipboard Managers such as Ditto, 1Clipboard, Clip Angel and others. Here are some links to the articles on the best Clipboard Managers https://bit.ly/3tkbjdR and <a href="https://bit

P.17 Hack your cursor.

Don't lie unhappy with your mouse cursor – use the tools on your system to hack it and make it your own. You can make it larger, change the look and speed, the number of lines it scrolls, etc.

P.18 Windows Power User Menu. https://bit.ly/3PFTjCe

Quit fumbling your way through the Windows Settings Menu and go directly to features that Windows power users use all of the time. You can right mouse click on the Start Button or Press and hold the WIN Key and then Press the X key. This will open the Power User Menu and allow you to go directly to Device Manager, Apps and Features, Computer Management, File Explorer etc.

P.19 Deskhaus standing desks. https://desk.haus/

Consider a powered Standing Desk for your next desk. Many people can benefit from a standing desk, but too often people try to start standing for 8 hours a day which quickly turns into pain and disappointment. The benefit comes from alternating between sitting and then standing for say 20 minutes. You can also add a balance or wobble board when standing to help you work your core. Even if you only use it while sitting, a standing desk will provide the ability to change the working height to suit your needs better than a fixed desk. There are a number of different providers out there. I selected a small US based company called Deskhaus (www.deskhaus.com) for my two 4 leg standing desks for my home office(I try to support small US Businesses and Chris the owner of DeskHaus was terrific and patient). While you can buy desks off of Amazon or your local office supplier, there are many options out there and I recommend that you join the reddit communities r/deskhaus, r/StandingDesk and r/StandingDesks to learn more before you buy and to ask questions. At the end of the day, the motors and electronics come from only a few companies in China or

Germany. Suppliers include Uplift, Vari-Desk, Hawthrone, Deskhaus and many, many more. Check out this post Standing Desks check out: https://bit.ly/3tdBZN7

P.20 Dance like no one is watching, email like it will be read aloud in court. https://bit.ly/3PZYoXm

This is just another reminder that what you send in emails CAN come back to haunt you. It is wasy to include jokes, course language and inappropriate information. But remember that there is no such thing as privacy if you are using your employers email system and that privilege and confidentiality are only good until the other party shares it with someone else.

Christopher Shattuck's Tips

H2 – <u>ChatGPT</u> – Want to check the grammar in your email while maintaining your voice? Do you have a closing argument for which you'd like to play devil's advocate, or would you like to hear it from the perspective of a jury? Perhaps you need someone else to review your brief for flaws or inadequacies. Before using, be sure to read "<u>ChatGPT Artificial Intelligence: Will It</u> Replace Lawyers and Legal Staff?".

H3 – <u>Practice411</u>, <u>WisLAP</u>, and <u>Ethics</u> – One-stop services for all of your law practice questions. If you need help figuring out whether a conflict exists or what information you can disclose in a motion to withdraw from representation in court, Ethics Counsel has you covered. If you are starting your own firm and need help understanding the best entity, malpractice requirements, State Bar of Wisconsin registration requirements, and the types of accounts to set up to process client money, Practice411 has got you covered. If you have been stressed out with work, working long hours, and eating and drinking more than you wanted, WisLAP is there to listen to you.

H4 – <u>Microsoft Transcribe</u> – A common question I received when I was the Practice411 Manager was about the best software for transcribing text. Outside of some of the larger companies, like BigHand, Microsoft Transcribe is the best option, and you are likely already paying for the service as part of your software suite. Simply upload an audio recording, rename the different speakers, and Transcribe will create a dictated text of your audio file with speakers and timestamps.

H5 – <u>Wisconsin Free Legal Answers</u> – If you would like to volunteer your time to answer questions from low-income individuals needing help, consider Wisconsin Free Legal Answers. Once you sign up and create a profile, you will have the chance to review the questions that have been posted to the message board, and if you wish, provide answers to those questions. You can literally complete this activity from anywhere in the world where you have an internet connection, and it will help make a difference for someone who cannot afford legal representation.

H6 – <u>Search for Text from iPhone Photos</u> – If you go into your Photos App on your iPhone, you can search for certain items, like a flower. Every photo you have with a flower in it or with the word "flower" in it will appear. I use this to take screenshots of important things I want to reference in the future. Then, I just search for that keyword, and I can quickly find it in my photos.

H7 – New Trust Account Charts – In case you missed it, on July 1, 2023, the trust account rules were changed and streamlined to make it easier to understand the rules and process payments accordingly. Ethics Counsel also produced new, helpful flow charts to understand the process of handling money. This is a must-review for anyone processing client funds or overseeing someone who is processing client funds.

H8 – <u>Google Keyword Planner</u> – If you are updating your website, you should be thinking about the keywords you are using. If you have enough content that is clicked on by other users with popular keywords, that can help place you at the top of Google's natural search list (not as a paid promoter). Check out the article link which provides a step-by-step process of setting up

Keyword Planner and also looking at other popular websites to discover their internet traffic and the popular keywords that brought visitors to their sites.

H9 – <u>Rocketbook</u> – One of the best reusable notebooks on the market. Once you have created your notes, you take a picture of it with your phone, and then the notes get uploaded into the cloud, allowing you to download and store them. Thereafter, you can wipe the pages clean and start anew. Great for folks that like to take physical notes and then reference them later on their computer.

H10 – Move Email Items to Trash on iPhone – Have you checked your archived messages on the email service provider that you access through your iPhone? If you are not deleting those items, they could become stockpiled in your email, eventually forcing you to delete thousands of emails. Moreover, if you have personally identifiable information stored in your email client about your personal life and become subject to a data breach, you may not want all those emails with your information in them. You can easily enable a feature on the iPhone where, if you delete an item, it goes into your trash.

H11 – <u>Digital Business Cards</u> – A great way to reduce your physical imprint is by saving trees and electronically providing access to your business card. Plus, the designs look much cooler than a traditional business card. And I don't know about you, but I would prefer to connect with people electronically rather than coming home after a conference and looking at business cards to add folks on LinkedIn or reaching out with an email.

H12 – <u>Pro Bono Portal</u> – A helpful collection of pro bono activities that you can plan on attending is available. Participate in a will drafting event, head over to a family law clinic, or sign up for a bankruptcy help clinic. There are many other opportunities. Check out the website to learn more.

H13 – Copy Text from iPhone Photos – My favorite feature to use when going to the store to buy items for a recipe is simple. Take a screenshot of the website you are accessing with your iPhone that lists the ingredients on the page. Once you have taken the screenshot, go into your photos. You should now be able to click on the text in the photo, copy it, and then add it to a note on your phone.

H14 – <u>LawSites Blog</u> – In my opinion, it's the best website for current trends in law practice management. Whenever new product features are announced, new mergers occur, or you just need to stay up to date on the latest buzz, Bob Ambrogi writes balanced articles that are easy to read and understand, as well as informative. This allows you to take the information and put it to use in your practice.

H15 – Wisconsin Chapter of the Association of Legal Administrators – If you have an office administrator and they are not part of WALA, I recommend you have them look into joining. In addition to monthly educational meetings, WALA has their own e-list where members can ask each other questions. Additionally, frequent newsletters are sent out on current trends, and members have the opportunity to network with other members and business partners at annual and local meetings throughout Wisconsin.

H16 – TSA PreCheck – If you are tired of waiting in long lines at airports in the US, consider signing up for TSA PreCheck. It is by far the best investment I've made for travel, and it only costs \$78 for a five-year membership, and \$70 to renew thereafter. Most US airports have a TSA PreCheck line that you go to when you arrive at the airport. I've never had to wait more than ten minutes to get through security. If you are traveling with just a carry-on bag, it greatly reduces the time you need to get to the airport ahead of time. Trust me, it is worth your investment.

H17 – <u>Internet Speed Test</u> – I use this from time to time at home or when I am traveling to test internet download and upload speeds. If you are going to be at a hotel or conference and need to complete a video conference, check the internet speed to make sure there is sufficient speed to support your meetings. Also, remember to check during high-volume times. If you check at 6:00 AM in the morning when no one is around, you'll probably notice different Wi-Fi speeds at 9:00 AM when the conference is bustling.

H18 – <u>Wireless Charging Compatible Phone Cases</u> – I bought a phone that had wireless charging capabilities, but I never used it. Then I bought the right phone case to wirelessly charge, as my car has a wireless charging port. I think it is more convenient than having to plug in your phone to charge. The cases have some pretty cool designs as well. Plus, if you have a portable battery pack that also has wireless charging capabilities, it can help cut down the number of cords you need to charge your devices.

H19 – Mediate Wisconsin – If you are in a county filing a foreclosure action or defending against one for a client, be sure to look into Mediate Wisconsin. Many counties have local court rules that require you to include mediation language in your documents when you are filing a case. In Milwaukee County, you can also take advantage of landlord-tenant mediation. If you're looking to volunteer and have previous mediation experience, consider signing up to be a volunteer mediator.

H20 – Microsoft Copilot – On November 1, 2023, Microsoft will be allowing access to Copilot for Teams, Word, Excel, and PowerPoint. There are so many features to discuss here and not enough space, so review the article, watch the video in the article, and give it a test spin when it is released.

Bryan Sims Tips

- D2 <u>DYMO LabelWriter 450 Twin Turbo</u> I love this label writer to make labels for lots of different things, including mailing labels and printing stamps. It's dead simple to use. Plus it's a thermal printer, so it never requires toner or ink.
- D3 Tun Off Outlook Notifications File > Options > Mail > Message Arrival. At installation, Outlook is designed to interrupt you every time that you receive an email. It will play a sound, change your mouse pointer, show an envelope icon in the taskbar, and display a desktop alert. This is terrible for productivity, it interrupts your work, and it makes you a slave to your email. Turn these notifications off.
- D4 Start Using Document Automation Document automation is one of the most powerful ways that you can leverage technology and staff to increase profitability. There are a bunch of options available. Check them out and start making your first more profitable. Options include The Form Tool, Pathagoras, Hot Docs, Woodpecker, and others.
- D5 <u>The Checklist Manifesto</u> One of the best ways you can document your practice is to create checklists for your processes. This book explains why you need to do this and the benefits from doing so. I can't recommend this book highly enough. I try to reread it every year.
- D6 Up Your Zoom Game We still do plenty of meetings via Zoom. This includes court, client meetings, and depositions. Let's take the opportunity to make ourselves look and sound better. For a microphone, I choose the <u>Blue Yeti</u> and for the camera I went with the <u>Logitech Brio</u>. There are, of course, other options available. I actually tried two other cameras before I selected the Brio. Regardless, doesn't hesitate to improve your video meetings.
- D7 <u>Locale</u> This is an app that is available for only Android phones. It was originally designed to allow you to control the volume of your phone based on your location. Since then it has expanded beyond that to allow you to control other aspects of your phone based on a variety of conditions. For example, I have a default setting that, among other things, turns off my wifi. I also have settings that turn the wifi on when I am at a safe location, such as my home and office. This is a great app that is infinitely customizable.
- D8 Lookout This is another phone app. It is available for both <u>Android</u> and <u>iOS</u>. It is sold as security and antivirus software. However, I like it for two specific features. First, when my battery drops to 15% and the phone enters low power mode, Lookout sends me an email with that information that includes the GPS location that my phone was at when this happened. Second, if someone tries to break into my phone and they fail, Lookout takes a picture of the person and emails that to me, along with the GPS location where this occurred.
- D9 <u>Duet</u> One of the down sides to getting used to using multiple monitors is that when you travel, you feel limited because you have only one monitor. There are a number of companies that make travel monitors that are light and will allow you to solve that problem. However, I don't like carrying additional stuff with me. I do have my iPad with me all of the time and I like being able to use it as a second monitor. The feature I like about Duet is that I can connect it directly to my computer via the charging cable. This means that I don't have to try to mess with it connecting via a strange wifi network.

- D10 Use a Monitor Stand Using multiple monitors can really increase your productivity. Getting your monitors off your desktop and mounted in a way to allow you to adjust them to make them work best for you just increases that productivity. This is the mount that I use. It currently costs around \$50.
- D11 <u>Logitech ERGO M575 Wireless Trackball Mouse</u> A friend of mine raved about this mouse for years. I resisted using the trackball because my prior experiences were never good. I finally broke down and gave this one a try. I absolutely love it and wished that I had switched earlier. In fact, after using this for one day at my office, I bought one for the house.
- D12 Schedule your video meetings from Outlook If you are using a video conferencing solution, I can almost guarantee that it has a plug in available for Outlook that allows you to schedule the meeting from within Outlook and without having to go to some website to do it. Also, you can control that feature that automatically makes every meeting a Teams meeting. Go to File > Options > Calendar > Calendar Options. The first option allows you to control whether all of your meetings are automatically video. Beside that is the option that allows you to control which provider this meeting is schedule with if you select this option.
- D13 Make Your Meeting Titles Useful I get meeting invites all of the time that say something like Telephone conference with Bryan. I suppose this is useful for the other person, but it is not for me. When you create your invite, put the name of all the parties, describe how the the meeting will be initiated, and what number to call. For example, Telephone conference between Craig Client and Bryan Sims. Craig to call Bryan at 630-344-9267.
- D14 Use a Gear Bag We typically carry around a variety of small technology items in our bags. Things like earbuds, charging cables, charging adapters, dongles, etc. Rather than letting those get lost in your bag, consider picking up some sort of gear bag or pouch. There are a lot of companies that make these. My favorite is this one from Waterfield Designs.
- D15 Mile IQ If want to get reimbursed for the milage that you drive for work, you are supposed to keep contemporaneous records. Your smartphone is already keeping track of everywhere that you go. Allow Mile IQ to manage this information for you and allow you to easily categorize and export monthly reports about your miles driven for business.
- D16 <u>Bluetooth Surface Arc Mouse</u> Despite the name Surface in the name, this mouse actually as nothing to do with the Microsoft Surface and will work with any computer that has Bluetooth. The feature I like best about this mouse is that when you fold it flat it turns off, thus preserving the battery.
- D17 Use Cross References in Word Word allows you to reference other portions of your document such as paragraph number and then update those references automatically. This works great both for litigation and for contract drafting.
- D18 Move Your Phone to Service to VOIP If you are still getting your office phone service in a traditional manner, you need to rethink this and consider moving to a VOIP system. You will

likely get a more robust system, with greater features, at a reasonable price. There are a bunch of companies that offer this service. Feel free to shop around.

D19 – Use a Bluetooth Headset with your desk phone – If you are still using your desk phone, there is no reason that you should be tethered to the phone when having your conversation. Pick up a Bluetooth headset to give you some freedom. If your phone isn't Bluetooth compatible, it may be time to upgrade that desk phone.

D20 – <u>Fujitsu ScanSnap ix1600</u> – I have been recommending the Fujitsu ScanSnap scanner for a long time. The latest versions (ix1500 & ix1600) incorporate some features that make the scanner even more useful. It has a touchscreen on the scanner that allows you to easily switch between different profiles, allowing you scan different documents to different locations or with different settings. They also have a lot of integration with cloud services, allowing you to easily scan to the cloud, even when your computer is not connected.



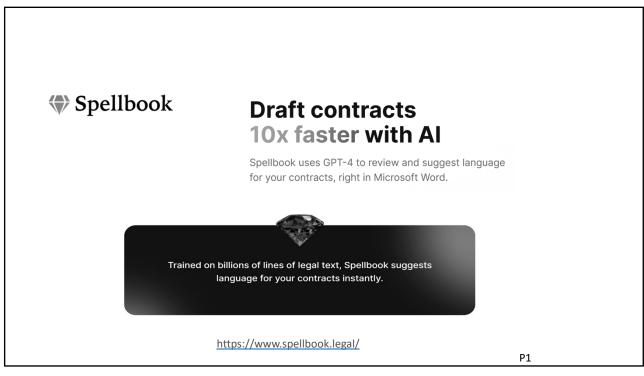


Scribe (https://scribehow.com/)



SK 1

3





Advice & Information

Opinions

LLC Firm Registration

Rules

Trust & Fiduciary Accounts

Ethics FAQs





wisbar.org/WisLAP (800) 543-2625

НЗ

5

Get rid of distractions!

Message arrival



When new messages arrive:

- Play a sound
- ☐ Briefly change the mouse pointer
- ✓ Show an envelope icon in the taskbar
- ☐ Display a Desktop Alert
 - Enable preview for Rights Protected messages (May impact performance)

BMS D3

FATHOM Now FAQ Testimonials Sign In Fathom Team Edition Now FAQ Testimonials Sign In Upgrade your productivity with your own free Al Meeting Assistant Fothom records, transcribes, highlights, and summarizes your meetings so you can focus on the conversation. Get setup in minutes. Sign up for FREE Fothom is completely free, No hidden contal, How contit be free? Al Product of the Year 2nd Sign Up for FREE Fothom is completely free, No hidden contal, How contit be free? Al Product of the Year 2nd Sign Up for FREE Audited O SCC2 Type II Audited O Net Zero Certified





Word for the web
Record and transcribe audio

Note: This feature is currently available in Word for the web and Word for Windows.







BMS D4

11

Windows Camera App

Screenshots





Description

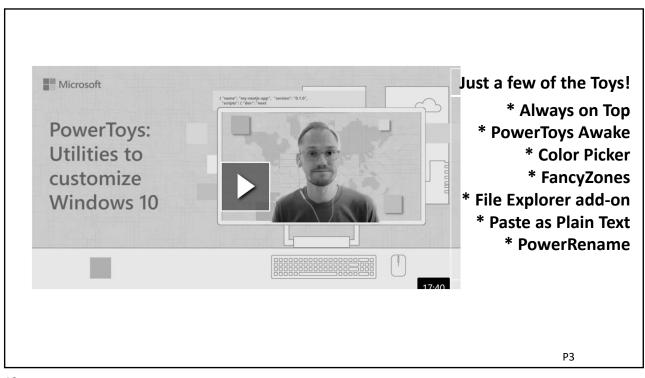
The Camera app is faster and simpler than ever. Just point and shoot to take great pictures automatically on any PC or tablet running Windows 10.

- skip the boring parts and capture only what's important.

 Use the timer to get yourself into the shot.

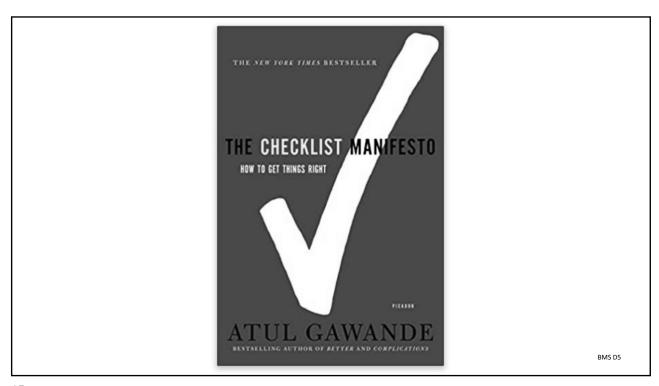
 Compose the perfect picture with the framing grid.
- Automatically back up your photos to OneDrive so you can get to them from any device, including your phone

JSK 3



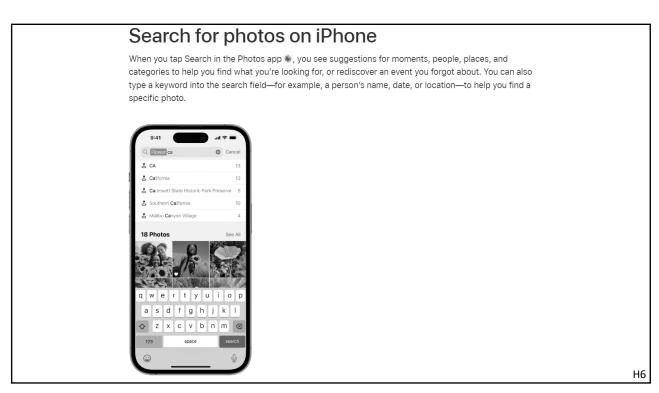


Н5

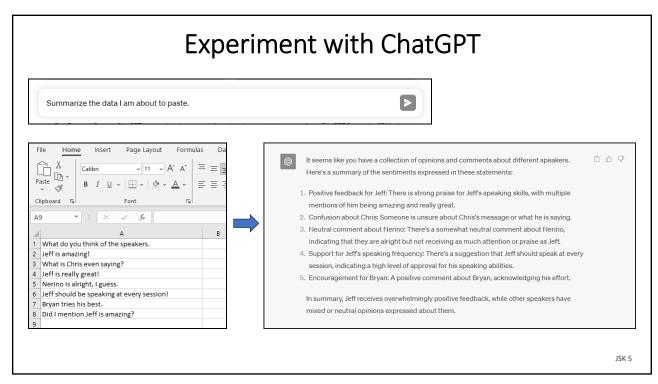


Delete Redundant Messages with Outlook's Conversation Clean Up Send / Receive View Home New Email * Re: Project Alpine Ski House avorites Today ← Reply ← Reply Pradeep Gupta ent Items ▲ Project Alpine Ski Ho... To ○Christie Cline; ○Nestor Wilke; ○Patti Fernandez; ○Johanna Lorenz; ❷ Megan Bowe ○Adele Vance eleted Items 19 Pradeep Gupta 10:17 AM Sorry for the confusion, both (i) If there are problems with how this message is displayed, click here to view it in a web browser 8 d Hero Pradeep Gupta 10:15 Al OK, I've added the both years 10:15 AM Hang on, let me check last year's numbers. roject Falcon 3 10:15 AM Need to tidy up your inbox? [3] Pradeep Gupta 10:10 A Ok, everything is in the folder eleted Items 19 Adele Vance <Adele V@contoso.com> Subject: Re: Project Alpine Ski House P4 onversation History Ok, everything is in the folder. Cortana

17



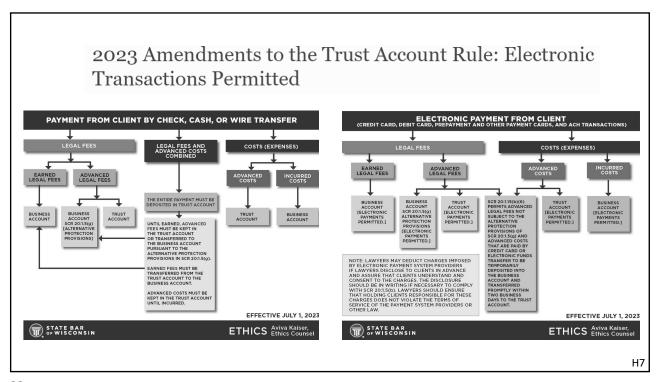


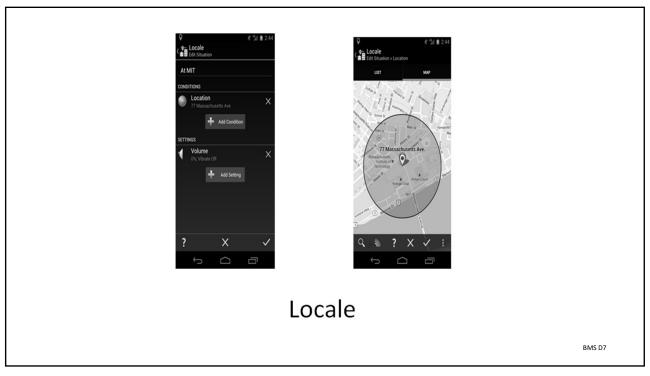




- 21
- ➤ Buy a smartphone with a limited data plan, set it up to come from the law firm's name, station it in a charger at reception desk and now the law firm has a text number for clients to use to text firm.
- ➤ Set it up to easily send routine items such as a Maps link to your office, some marketing materials or a link to some information on your website.

P5b





Windows Dictation



This is a simple dictation using my desktop speaker phone to dictate. I promise I have not made a single correction in this dictation. Although, a few simple tricks like speaking the punctuation definitely help.

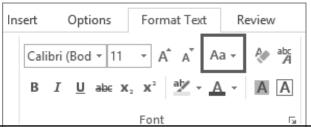
JSK 6

25

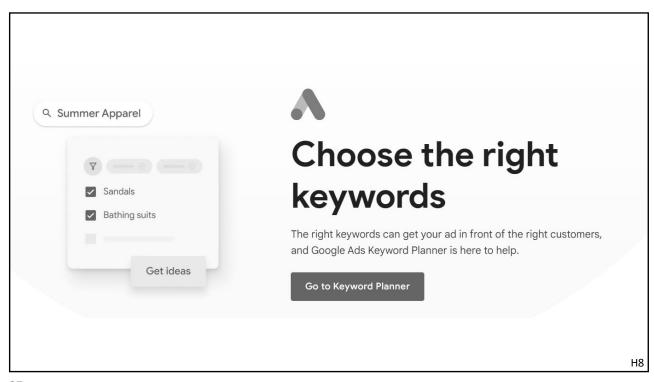
Quit retyping text that has the incorrect case...

the first letter is lower case and the rest is upper case

Use the Change Case Function

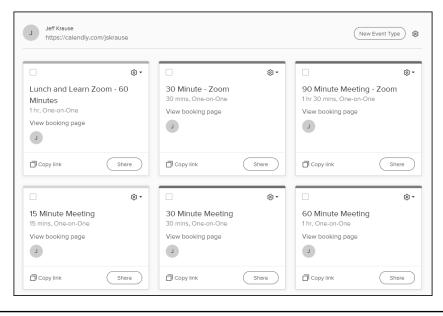


Р6





Calendly (https://www.calendly.com)



29

Take video conferencing to a whole new level with Meeting Owl.



Р7

JSK 7



Or checkout the **EMEET Meeting** Capsule.



Use Your iPad as a 2nd Screen



http://www.duetdisplay.com/

BMS D9

33

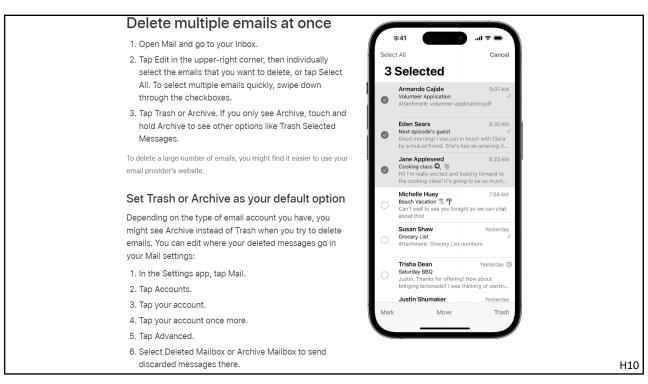
Generating PDFs (When Size Matters)

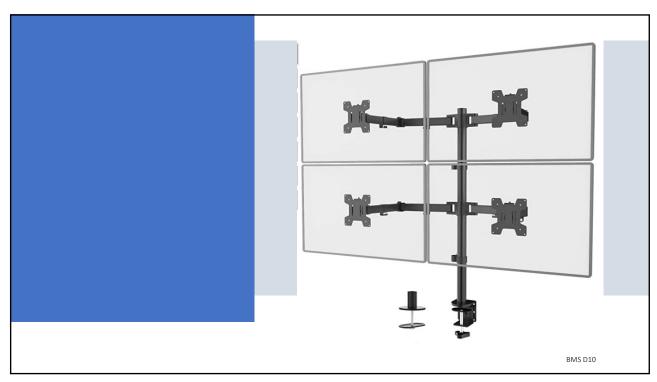
Our Word manual has 386 pages and 10.2 MB in Word

₩ord Manual - Windows Publish to PDF.pdf	8/7/2022 2:21 PM	7,869 KB
₩ord Manual - Save As PDF Windows.pdf	8/7/2022 1:46 PM	7,978 KB
🗟 Word Manual - Acrobat Create PDF Button.pdf	8/7/2022 1:50 PM	8,533 KB
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₩ Word Manual - Power PDF Print to PDF.pdf	8/7/2022 1:59 PM	11,850 KB
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₩ Word Manual - Windows Print to PDF.pdf	8/7/2022 1:55 PM	20,260 KB

JSK 8

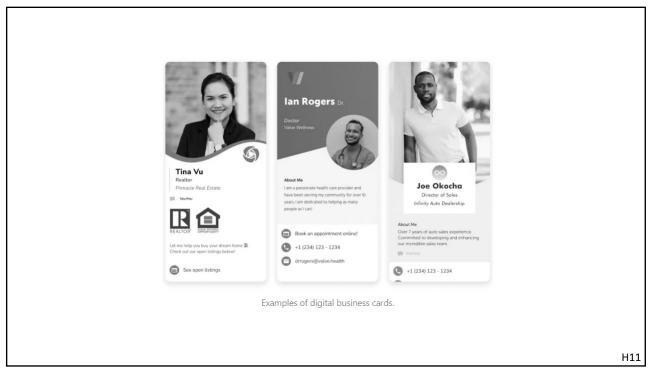








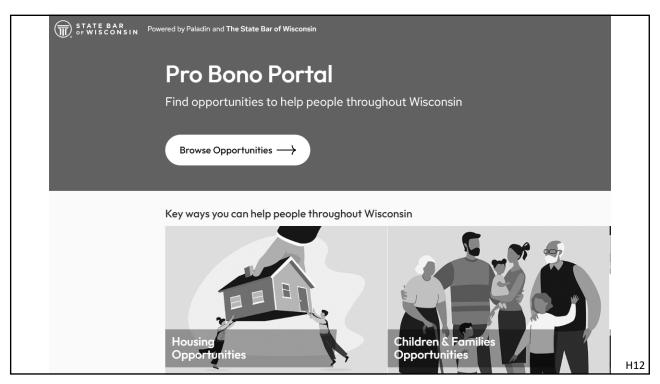












P±		
d Required Optional		♣ Add 8x8 Meeting
	Schedule a Meeting	BMS D12



OneTastic for OneNote

Give new life to your OneNote with Macros



47

Copy text in a photo, video, or image

- 1. Open the Photos app and select a photo or video, or select an image online.
- Touch and hold a word and move the grab points to adjust the selection. If the text is in a video, pause the video first
- 3. Tap Copy. To select all of the text in the photo, tap Select All.

After you copy the text, you can paste it in another app or share it with someone. To highlight all text in a photo or image, select a photo or image, then tap the Live Text button in the lower-right corner of the photo.

In iOS 16 and later, you can also isolate the subject of a photo and copy or share it through apps like Messages or Mail.



H13

Title Telephone conference with Bryan

Title Telephone conference between Craig Client and Bryan Sims. Craig to call Bryan at 630-344-9267

BMS D13

49

Gaming Gear for the Office



Redragon K556 RGB Mechanical Gaming Keyboard M908 MMO Gaming Mouse Bundle \$84.99

JSK 12

Draft Better Documents...



Meet your ideal editor. Meet WordRake.



BriefCatch

Revolutionize your legal writing: smarter, faster, tighter drafts today.

P13

51

S LawSites

Tracking Technology and Innovation for the Legal Profession



LegalOn Expands from Contract Review to Drafting with Addition of 100+ Lawyer-Drafted Contract Templates

By Bob Ambrogi on September 21, 2023

LegalOn, a company that was already one of Japan's largest providers of AI contract review technology when it launched into the U.S. market last December, today is announcing its expansion into contract drafting with the release of LegalOn Templates, a collection of more than 100 market-standard templates created and kept current by attorneys...



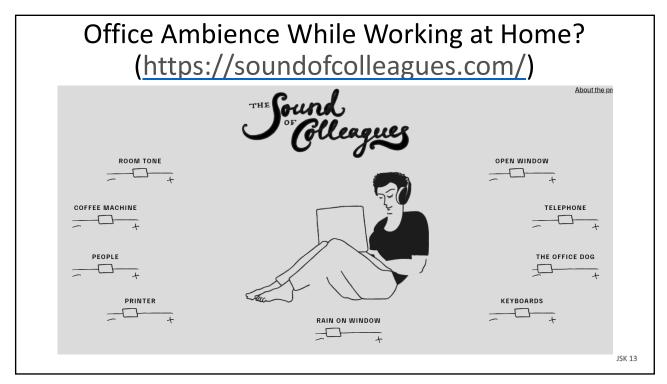
12 Thoughts on Promises and Challenges of AI in Legal after Yesterday's AI Summit at Harvard Law School

By Bob Ambrogi on September 20, 2023

Yesterday, I attended the Harvard Law AI Summit organized by the Library Innovation Lab at Harvard Law School. It was a fairly intimate, invitation-only gathering of roughly 65 people, held under the Chatham House Rule, meaning that participants were free to use the information we received, but we agreed not to disclose the...

H14







Wisconsin Chapter

A Chapter of the Association of Legal Administrators

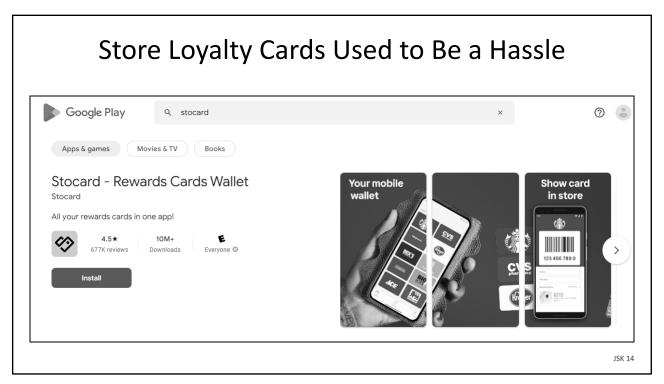
HOME ABOUT * MEMBERSHIP * NEWS * MEETINGS * BUSINESS PARTNERS * JOB BANK PHOTOS CONTACT US

56

H15



٠,



Stop OTPs from filling your Galaxy Phone Inbox!



P15

59

TSA PreCheck Benefits



Wait 10 Minutes or Less

About 99% of TSA PreCheck® passengers wait less than 10 minutes.



Families Welcome

Children 17 and under can join an adult with TSA PreCheck® when TSA PreCheck appears on the child's boarding pass. Learn more.



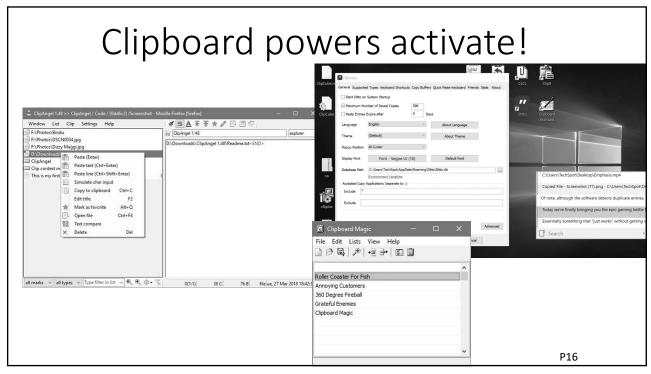
Nationwide Access

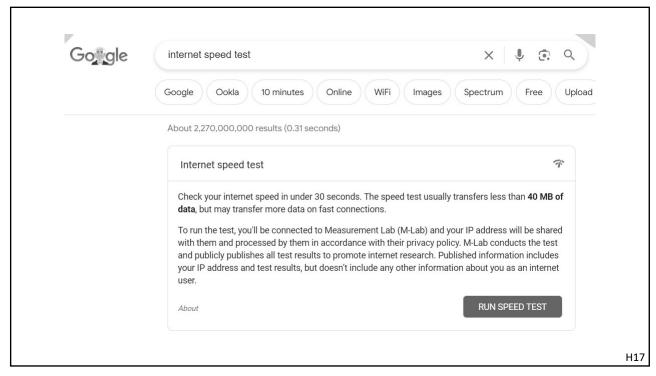
More than 200 airports and 90+ airlines provide TSA PreCheck®

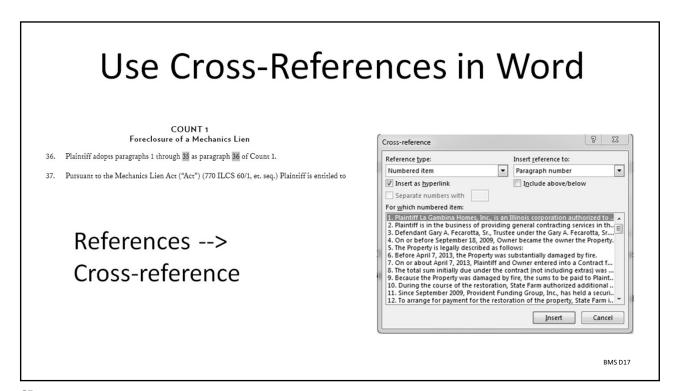
H16



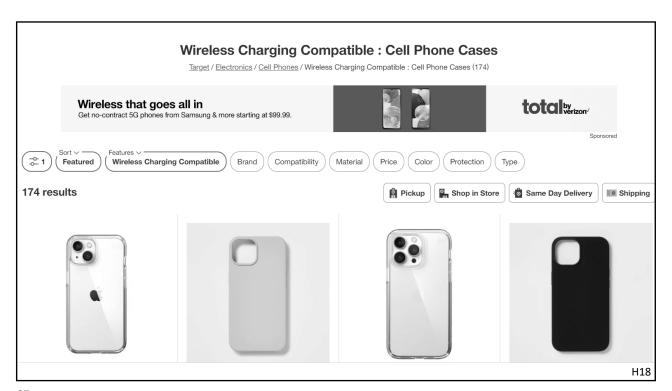




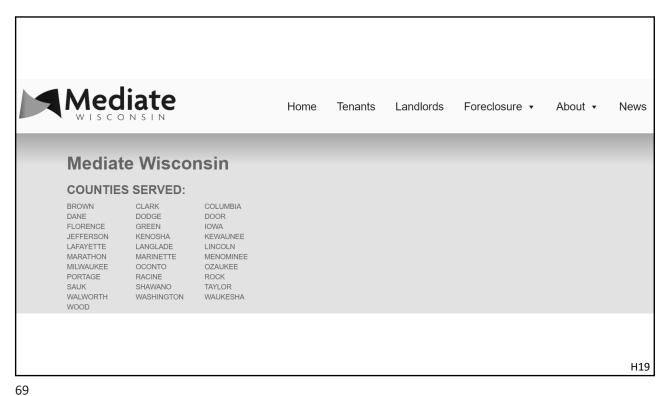




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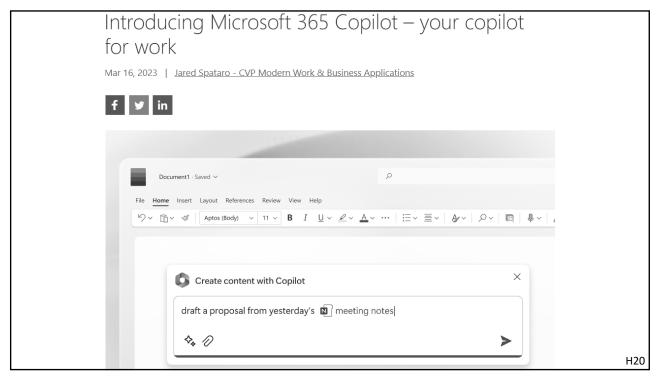
Dance like no one is watching......

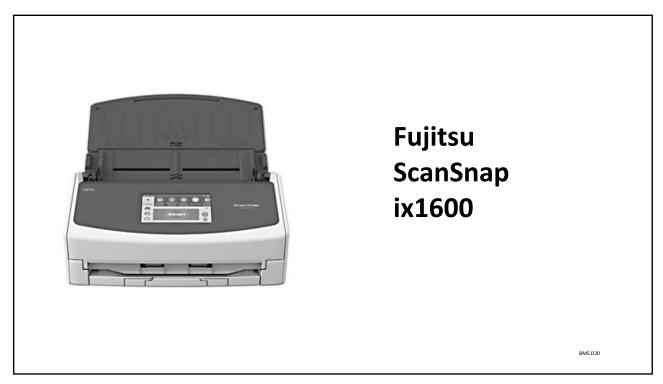


P20a



72





Apps and Features		Win11	Win10	Win
	Installed Apps (P)			
Power Options	Apps and Features (F)			
Event Viewer	Windows Power Programs and Features (F) Mobility Center 1 (B)			
	V V I I I U U V V S I U V V C I Mobility Center ¹ (B)		*	
System	Power Options (O)			
Device Manager	User Menu Event Viewer (V) System (Y)		•	
Network Connections		· .		
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Task Manager	Task Manager (T)	÷		
3	Settings (N)			
Settings	Control Panel (P)			
File Explorer	File Explorer (E)		•	
	Search (S)			
Search	Run (R)			
Run	Shut down or sign out 2 (\mathbf{U} , then \mathbf{I} , \mathbf{S} , \mathbf{U} , \mathbf{R})		*	
Shut down or sign out	Desklop (D)			
Desktop	P18			

