Working in the CLOUD
Using Web-Based Applications and Tools to Collaborate Online

JASON R. RICH

FREE SAMPLE CHAPTER
Working in the Cloud

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Jason R. Rich
## Contents at a Glance

1. Introducing Cloud-Based Computing and Collaborating ........................................2
2. Determining Your Needs for Cloud-Based Solutions ............................................12
3. Becoming a More Efficient Collaborator ................................................................34
4. Understanding Cloud-Based Security Concerns ..................................................48
5. Collaborating with Box ...........................................................................................62
6. Using Cisco WebEx for Large-Group Collaboration ............................................82
8. Managing Collaboration with Dropbox ..................................................................116
9. Taking Notes and Staying Organized with Evernote ............................................142
10. Working in Google’s G Suite ................................................................................156
12. Handling Large-Group Collaboration with Microsoft Exchange Online ..............188
13. Bringing Teams Together with Salesforce ..........................................................196
14. Communicating via Skype ....................................................................................216
15. Discovering Slack ..................................................................................................234
16. Maximizing Communication Efficiency with Trello ...........................................256
17. Adapting to Quickly Evolving Technologies ......................................................278

Index .........................................................................................................................290
Table of Contents

Chapter 1: Introducing Cloud-Based Computing and Collaborating  2
What Is the Cloud? ........................................................................................................3
   The Mechanics of Cloud Storage ..................................................................5
   Security Concerns in the Cloud ..................................................................5
   Considerations When Selecting Services ...................................................6
How to Use Cloud-Based Computing ...............................................................8
What You Need to Get Started ...........................................................................9
What You Should Know Before Getting Started ..............................................11

Chapter 2: Determining Your Needs for Cloud-Based Solutions  12
Common Business Uses for Cloud-Based Tools ..................................................12
   Managing Customer Relationships ................................................................13
   Syncing and Storing Files Across Devices ................................................14
   Sharing Files .............................................................................................15
   Communicating with Group Messaging ..................................................16
   Conducting Interactive Polling and Q&A Sessions ....................................17
   Integrating Services with Microsoft Office 365 .......................................17
   Collaborating in Real Time .......................................................................18
   Sharing Screens and Virtual Whiteboards ...............................................19
   Recording and Playing Back Virtual Meetings .........................................19
   Voice Calling and Video Conferencing ...................................................19
Overview of Online File-Sharing and Collaboration Services ................................20
   Box ............................................................................................................21
   Cisco WebEx ...........................................................................................22
   DocuSign ..................................................................................................24
   Dropbox and Dropbox Paper ...................................................................25
   Evernote ....................................................................................................26
   Google G Suite ..........................................................................................27
Microsoft Exchange and SharePoint ........................................................28
Microsoft Office 365 ..............................................................................28
Salesforce ................................................................................................29
Skype ......................................................................................................30
Slack .......................................................................................................30
Trello .......................................................................................................31

Chapter 3: Becoming a More Efficient Collaborator 34
Working Efficiently with File-Storage and Data-Syncing Services .............35
Tips for Effective File-Sharing ..................................................................37
  Maintain Control of the Files You Share ..............................................37
  Manage Permissions for Shared Content ...........................................39
  Understand How You Can Lose Control of Content .........................40
  Maintain a Version History for Important Documents and Files ..........41
Etiquette and Strategies for Real-Time Collaboration .............................41
  15 Tips for Getting the Most from Using Collaboration Tools ..........42
  Develop a Meeting Plan .....................................................................44
  Strategies for Effectively Using Chat or Group Messaging .................46

Chapter 4: Understanding Cloud-Based Security Concerns 48
Certifications from Recognized Organizations .......................................48
Types of Security Threats .......................................................................49
Ways to Protect Yourself When Using the Cloud ...................................50
User Mistakes That Often Lead to Security Problems ...........................53
Strategies for Password Creation and Management ..............................54
Two-Factor Authentication .......................................................................56
Virtual Private Networks ..........................................................................57
  Norton WiFi Privacy Service ...............................................................58
  Additional VPN Service Options ..........................................................60
Chapter 7: Using DocuSign to Review, Edit, Sign, and Share Documents 102

DocuSign Overview ........................................................................................................... 102
Benefits of DocuSign .......................................................................................................... 103
DocuSign Subscription Plans ............................................................................................ 107
The DocuSign Mobile App ................................................................................................. 108
Interview with DocuSign Founder and CEO Tom Gosner ................................................. 110

Chapter 8: Managing Collaboration with Dropbox 116

Dropbox Overview ............................................................................................................. 116
File Storage in the Cloud ................................................................................................... 118
File-Sharing Functionality ............................................................................................... 119
Data Syncing .................................................................................................................... 121
Dropbox Subscription Plans ............................................................................................. 122
The Dropbox Plus Plan ..................................................................................................... 122
The Dropbox Standard Plan ............................................................................................. 123
The Dropbox Advanced Plan ............................................................................................ 123
Dropbox Software ............................................................................................................. 124
The Dropbox Mobile App ................................................................................................. 130
The Dropbox.com Website ............................................................................................... 133
Dropbox Paper .................................................................................................................. 135

Chapter 9: Taking Notes and Staying Organized with Evernote 142

Evernote Overview ............................................................................................................ 142
Evernote Pricing ................................................................................................................ 144
Setup of Evernote ............................................................................................................. 145
Note-Taking in Evernote .................................................................................................. 146
Evernote’s Data-Syncing and File-Sharing Tools ............................................................... 149
Collaboration ..................................................................................................................... 152
Add-Ons, Third-Party Apps, and Templates ................................................................... 154
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Dedication

This book is dedicated to my family and friends, including my niece Natalie, my nephew Parker, and my Yorkshire Terrier, named Rusty, who is always by my side as I’m writing.

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Becoming a More Efficient Collaborator

This chapter offers a handful of useful strategies to help you become more efficient using cloud computing for a variety of tasks. This chapter introduces you to the following:

- Strategies for using cloud-based file-storage and data-syncing services
- Tips for protecting your data, documents, and files when using file sharing via a cloud service
- Suggestions for achieving the best possible results when using real-time collaboration tools to work with others in a virtual workspace

The majority of cloud computing services offer a vast and ever-expanding collection of tools to help you become more efficient when working with data, documents, files, and content.

When you work in a company, which services and tools you use might be dictated to you; your managers and IT department might decide which services the company as a whole will use. This will require you to adopt the service and modify your current work habits while taking the steps necessary to protect the content you’re working with. If you have previously stored files locally on your computer, for example, and worked with collaborators face-to-face in a conference room, you now need to get into the habit of storing your content online and interacting efficiently with your collaborators in virtual workspaces.

If you’re the decision-maker within your team or business, the burden of choosing the best cloud-based tools becomes your responsibility. Before you make any decisions, however, it’s essential that you develop a clear understanding of your company’s current operation and needs, as well as the work habits of everyone who will ultimately be using the services you choose. When you have that knowledge, you properly evaluate each service from a functionality perspective and choose one or more ways to use cloud computing that will ultimately be beneficial to your organization. Other important considerations include cost, employee training, and data security and compliance issues.
After you know which cloud-based tools you’ll be using, you need to follow some initial steps that are recommended for all new users:

- Learn about the features and functions that are offered and define how you’ll need to alter your work habits to conform to the tools at your disposal.
- Develop a clear understanding of company policies related to the use of the services you’ve selected. This includes knowing what content you can store online and use in a virtual workspace and what content, if any, must remain stored locally and kept out of the cloud for security purposes.
- Adopt the necessary security protocols that will protect your accounts, the content stored within the cloud, and any communications that take place via the cloud.
- Determine how to work as efficiently as possible while staying focused on the task at hand. This includes maintaining a professional demeanor when engaged in video conferences and text-based messaging, for example.

Working Efficiently with File-Storage and Data-Syncing Services

There are several benefits to using a cloud-based file-storage and data-syncing service. First, your data, documents, files, and content aren’t stored locally, where it’s accessible only to a single computer or mobile device; it’s stored in the cloud, so it’s accessible to any computers and mobile devices to which you can connect the account. This accessibility provides convenience, but it also serves as a secure remote backup. If a computer is lost, stolen, or damaged, for example, you can still access your important content by using other equipment with virtually no downtime.

You should treat cloud-based file storage just like local storage when it comes to organizing and managing files. Create folders and subfolders and give them descriptive names that relate directly to the content you’re storing in them. Also, keep filenames short and relevant. Because files are automatically stored based on date and time, you typically don’t need to include this information in the filename. If you’re working with a group of people who will be sharing files and folders, establish a clear policy for naming and organizing the files and folders in a way that everyone will easily understand.

In Practice

Incorporate Tags, When Applicable

Based on the service you’re using to store your content in the cloud, it’s often possible to associate tags, or keywords, with each file and folder. Tags make it even easier to find, sort, or organize relevant content when using a Search tool.
You and your collaborators should be consistently diligent in storing only appropriate and related content within each folder or subfolder so that everything stays well organized. Try to avoid going more than three to five levels deep when using subfolders. In other words, maintaining an easy-to-navigate file structure is important. Any files or folders that are mislabeled or stored incorrectly need to be fixed.

In Practice

Keep Certain Files Together

If you work with files related to a specific subject matter that needs to be managed with extra care because of compliance regulations, you should group these files into aptly named folders so they're easy to locate.

If you use more than one cloud service, it can be hard to track what things are stored in which location. When possible, it’s important to rely on a single cloud-based file-storage solution for all of your needs. By keeping files in one central service, you won’t waste valuable time keeping track of on which service specific data, documents, and files are stored; you also won’t need to switch between two or three separate services to gather all the content you need for a specific project and then remember where revised versions of files were later stored.

To simplify data syncing between all of your computers and mobile devices, make sure that the service works with the software, mobile apps, and equipment you’ll be using. If necessary, download and install the service’s proprietary software or mobile app onto each of your computers and mobile devices. The only way for content stored in the cloud to automatically sync with all of your computers and mobile devices is if you use the same account information to log in to each service from each of your computers and mobile devices. Also, all of the service’s setup and configuration settings typically need to be set exactly the same on each computer and mobile device.

As you transition to working with a cloud service and toolset where everything is stored online and none of your data, documents, or files are stored locally, remember that if you don’t have continuous Internet access, you won’t have access to your content. Common situations when you might not have Internet access include:

- You opt to work from home, but your home’s Internet connection stops working.
- You’re on the road and travel to an area where there’s no cellular data service, and you can’t find a public Wi-Fi hotspot.
- You’re traveling by airplane, but the aircraft is not equipped with Wi-Fi during the flight.
- The Internet in the hotel where you’re staying during a business trip is unreliable.
- You’re traveling abroad, and you want to avoid costly international cellular data roaming charges.
These and other situations require that you plan ahead. Before leaving your office, for example, anticipate what content you’ll need from the cloud and download those files to your laptop computer’s internal hard drive, a portable hard drive, or the internal storage of your mobile device. Otherwise, you’ll have to wait until you can once again establish a secure Internet connection before you can access your content.

**CAUTION**

**A Secure Internet Connection Is Desirable**

Especially if you need to access private, classified, or sensitive content stored in the cloud, you want to ensure that you use only secure Internet connections when you’re working outside of your office. You might need to install additional security software onto your laptop computer or mobile device so that you have an additional layer of protection if you attempt to access your cloud account from an unsecure public Wi-Fi hotspot.

Chapter 4, “Understanding Cloud-Based Security Concerns,” suggests that you might need to establish a virtual private network (VPN) via your computer or mobile device when accessing any public Wi-Fi hotspot. A VPN can easily be established using your existing equipment. It provides online privacy and anonymity by creating an encrypted connection when sending and receiving data between your computer or mobile device and the public (unsecured) Wi-Fi hotspots you connect to from coffee shops, Internet cafes, airports, hotels, public libraries, or your home. This encrypted connection protects your credit card information, banking information, emails, and everything else from snooping strangers.

Norton Wi-Fi Privacy (https://us.norton.com/wifi-privacy) is one option that individuals or groups can use to establish a VPN. A per-user fee of between $4.99 and $9.99 per month applies, based on the number of computers and devices a user needs to protect.

If you work for a company that manages its own network, your IT administrator might provide you with other security software that caters specifically to the needs of your company or organization.

**Tips for Effective File-Sharing**

With many cloud services, you have the option to share specific files or entire folders with other people or groups of other people. When you do this, the person or people you opt to share content with can share content in your account. Everything else that’s stored within your account theoretically remains private and inaccessible by those other users.

**Maintain Control of the Files You Share**

File-sharing management is the owner’s responsibility. A simple user error could easily lead to the wrong content being shared with the wrong people, or content being made available to your entire team
or organization when it was only meant to be shared with a single individual. Before taking advantage of the file-sharing capabilities of any service, make sure you understand how the functionality works and that you know how to manage the sharing privileges and permissions associated with your files and folders. Based on the type of content being shared, consider putting additional (optional) security measures in place, such as password-protecting the shared files or folders. Some services also allow owners to set up a two-step verification process, which helps ensure that only the invited people can gain access to shared content.

**FYI: Owners Versus Invitees**

The *owner* is the person who controls a cloud account, selects the files and/or folders to be shared, and then determines specifically with whom the content will be shared. The owner might be a project manager or team leader, or the person who initially created or composed the content. *Invitees* are the people who are granted permission to access specific files or folders that are stored within the owner’s cloud-based account.

As the owner, you always maintain the ability to invite additional people to share the content with or revoke someone’s access to the content later. It is your responsibility to ensure that your content is properly organized and that you invite only the appropriate people to access the content that they should become privy to. When necessary, you may need to revoke access to people who no longer need access to the content.

**In Practice**

**File Downloading**

When you’re sharing files and folders or collaborating on files, it’s a good idea to deactivate the ability for collaborators or team members to download the files (at least until the document is finalized). By preventing others from downloading, all necessary people always have access to the latest version of a document, but you’re preventing unauthorized people from accessing it (because people can’t download and share the file). All work done to the document is automatically logged as part of a document history, which is typically created by the cloud-based service, so you have an audit trail that might be needed for compliance purposes.

If work-in-progress files need to be shared with people outside of the cloud, activate password protection to that document or file, and try to avoid sharing it via email.
In Practice

Understand What Can Happen with Shared Files

Every time you opt to share any content with other people via any sharing service, it’s up to you (the owner) to set permissions for each file and folder as well as for each person you’re sharing with. The permissions determine what the invitees are able to do with the content you’re sharing.

Don’t rely only on default settings when sharing files, especially if you’re working with sensitive or confidential content.

Manage Permissions for Shared Content

All file-sharing services allow the content owner to determine what exactly can be done with the content being shared. For example, permission options might include the following:

- **Read Only**—The invitees can open and read the files on screen, but they can’t alter or store the files locally.
- **Read and Edit**—The invitees can freely read and edit the shared files.
- **Read and Comment**—The invitees can read these files, but they can only add comments, not edit or alter the files directly.
- **Download**—The invitees can view (and potentially edit) the content and download it to their own computer(s) or mobile device(s). This setting gives the invitees, as well as the owner, control over the content. Whether or not the invitee can edit a shared document is based on the security settings the sender has applied to the file.
- **Share with Others**—The invitees are able to share the content with others at their discretion.
- **Printing Options**—The owner can determine if others are able to print the content locally or just view it on their screen.
- **Expiration Date for Shared Content Links**—The owner can make the link active for a pre-defined time period, ranging from several minutes, to several hours, days, weeks, or months. After the link expires, the invitees no longer have access to it.
In Practice

Get Into the Habit of Checking Your Settings

The easiest way to avoid mistakes is to diligently manage your account. On a daily or weekly basis, get into the habit of accessing your account and check the status of each file and folder that you’re sharing. Make sure the settings and permissions are correctly adjusted based on the sensitivity of the content, and verify that you’re sharing only with the proper individuals.

Common errors to check for include

■ Accidentally selecting the wrong file(s) or folder(s)
■ Choosing the wrong people to share the selected file(s) and folder(s) with
■ Incorrectly adjusting the permission options, which gives the invitees the ability to edit, share, print, or otherwise work with the content in ways they’re not authorized to do
■ Failing to revoke access to content that other people no longer require access to—for example, if someone has left the team or company but their access to the cloud-based content remains in place

When a file-sharing service is adopted by a group of people or company, one person is typically given administrator control. The administrator can activate security features and manage all account settings for everyone, which can override individual user settings. What the administrator can do is based on the service being used. I discuss more about administrator capabilities throughout this book.

Understand How You Can Lose Control of Content

When you invite people to collaborate on a file or document, or you grant them permission to view and edit the document as well as download it to their computers or mobile devices, you lose significant control over that content. Even if an invitee’s ability to download and print content that they’re working with in the cloud is disabled and they’re only able to view it on their screen, that invitee could theoretically use his computer or mobile device’s screen capture functionality (or screen recording software) to later duplicate and reproduce that content.

A more common occurrence relating to when a content owner loses control over their file(s) is when permission is granted for others to download the content. After the content leaves the secure cloud-based workspace, the invitee can typically do with it as she pleases—editing it, printing it, and distributing it at her discretion.

If the owner later revokes someone’s access to the cloud-based version of the file, the invitee is prevented from obtaining file updates (as the owner or authorized collaborators edit the content), but any files the invitee has already downloaded are still at large and possibly being edited by the invitee.
In Practice

**Locking Down Files**

You can use built-in features of some software to protect files, including Microsoft Word documents, before you store them in the cloud. From the Microsoft Word Security window, you’re able to protect a document against modifications related to Track Changes and Comments, or you can strip the document of any personal information upon saving it.

After a document or file has been secured or protected using tools built into the software you’re using, it can then be uploaded and shared using a cloud-based service. Then, even if an unauthorized person manages to download the document by hacking into your cloud-based account, for example, they still won’t be able to open that document file if its password protected using a different password than the one used to gain access to your cloud account.

**Maintain a Version History for Important Documents and Files**

Most cloud-based services automatically store older versions of a file or document as it’s being edited. This version history allows users to access older versions of files for reference (for example, to determine when a change was introduced) and allows the cloud-based service to maintain a detailed audit trail for each document or file.

You have to make sure this feature is turned on in the service you’re using; also make sure that older versions of a file or document are protected against deletion by individual users. Then you determine how long file or document histories are maintained and stored by the service.

If version history functionality is important to your team or organization for compliance purposes, or just for peace of mind (to protect against accidental deletion of important information, for example), look for services that maintain a complete file history forever rather than for only 30, 60, or 120 days. For this feature, you might need to subscribe to a premium version of the service.

When working with files and documents that have a version history (a copy of every version of that file or document is kept as changes or revisions are made), pay attention to the file’s date and time to ensure you’re always working with the most up-to-date version. Some services make only the latest file or document version readily available to all users and store the older versions of that file or document in a safe folder that’s not as easily accessible.

**Etiquette and Strategies for Real-Time Collaboration**

Whether you’re relying on virtual whiteboards, group messaging, video conferencing, or real-time collaboration tools that allow multiple people to work with the same file or document simultaneously, all collaborators need to be proficient using the tools and understand how and when it’s appropriate to interact with their team members and collaborators. You need to make sure everyone understands why
the online collaboration tools are being used and what the expected outcome should be. Some goals for online collaboration within a team or organization include the following:

- Reducing reliance on email
- Reducing the need for in-person meetings
- Reducing occurrences of phone tag and time spent on the phone reiterating what was already discussed with other team members or collaborators
- Improving group communication
- Increasing transparency and maintaining a detailed log, transcription, recording, or history of all conversations, chats, and work done on files
- Ensuring that the latest version of all relevant files, documents, data, and content is readily available to all team members and collaborators and that everything is stored within a single, secure, cloud-based location
- Making sensitive content only available to authorized people in a secure way
- Providing all team members and collaborators with the same set of tools to ensure file and data compatibility and accessibility, regardless of what hardware each person is using
- Providing a way for people to communicate, exchange information, share content, and collaborate in real time from any location

Real-time collaboration works the best when a virtual workspace is available to a group of people who are assigned to work on a specific project or task. The content and communication within each virtual workspace should be related only to that project or task. In addition, don’t start a group discussion within a cloud service’s group chat and then continue the same conversation with only some of the collaborators on the phone, in person, or via email.

Communication that occurs outside the virtual workspace means that the cloud-based collaboration tools are not able to track and store a transcript and log of what’s transpired, which could result in a breach in compliance regulations. It can also lead to miscommunication or the loss of important information that hasn’t been properly documented and shared with everyone involved.

15 Tips for Getting the Most from Using Collaboration Tools

Use the following strategies to ensure online collaboration happens in an organized and productive way:

- Define your team or group of collaborators and make sure everyone has access to the same online collaboration tools from their accounts.
- Define the scope or overall goal of the collaborative efforts.
Get everyone up to speed using the collaboration tools that have been selected by the team leader. If someone doesn’t know how to access a video conference, share a file, or utilize group messaging, this could waste everyone’s time or result in easily avoidable user error that will make using the cloud-based collaboration tools less secure.

Set deadlines or milestones that everyone needs to work together to achieve. If necessary set a virtual meeting schedule as a new project or task gets underway. Use the collaboration tool’s ability to generate, manage, and share task or to-do lists for this purpose.

Set specific security guidelines, by defining what can and can’t be discussed or distributed outside of the collaboration team.

Have everyone agree to use the selected tool (or tools) to manage the designated task or project.

Set restrictions relating to what topics should or should not be shared with the entire team, and develop procedures for how individual team members should interact with each other within the virtual workspace. For example, instead of suggesting two team members converse privately on the phone, have them communicate via the cloud-based platform’s text messaging service, which helps maintain a transcript of all discussions.

Don’t waste people’s time. When a conversation between two team members needs to take place, don’t hold that conversation in a forum where everyone is present or has to participate (such as a group video conference, virtual meeting, or group text message session). Instead, converse one-on-one in a private virtual workspace, or send private messages to each other using the collaboration tool’s direct messaging feature.

When interacting using any real-time collaboration tools (using group messaging, voice conference calls, video conferences, or collaboration tools to work on a document, for example), instruct everyone to stay on topic. If one or more people bring up lunch plans, upcoming vacation plans, or what happened the previous night on their favorite television show, everyone will be distracted, and the workspace will be cluttered with information and content unrelated to the task or project at hand.

Assign a team leader or admin person to oversee how the cloud-based tools are being used, manage user accounts, and keep everyone focused. Define the role and responsibilities of the team leader or admin person, as well as the responsibilities of each team member or collaborator.

Have each user customize his or her account profile so it includes and displays their full names, job titles, profile photos, and any other important details that team members or collaborators need to identify with whom they’re working. Refrain from using a cute or funny nickname for yourself; that’s acceptable when using social media but not appropriate for a work environment. Account profiles are particularly important for large teams or entire companies that are using cloud-based tools to communicate and exchange information.
Have each user turn on notifications related to the collaboration tools so that everyone is alerted when a new group message is posted, something requires a user’s attention, a new file is uploaded, or when content is edited, for example. With notifications turned on, team members do not need to constantly monitor the workspace to make sure they don’t miss anything important. Instead, when something requires a particular person’s attention or the whole group needs to be brought up to date on something, the appropriate people receive an email or text message that prompts them to access their accounts.

Agree to a method for team members to share new ideas, comments, and constructive feedback in a way that allows everyone to be heard but that does not hinder progress. All team members and collaborators should be invited to participate and share, and feel comfortable doing so, without receiving harsh, unprofessional, or negative feedback or criticism.

Take advantage of a group scheduling or time-management tool when planning and coordinating schedules and virtual meeting times.

Have the team leader post daily, weekly, and monthly progress reports to keep everyone apprised of how far along the group is toward achieving desired goals or milestones. When it becomes necessary to tweak or re-evaluate a goal, deadline, or objective, everyone involved should be kept up to speed using the communication tools provided by the cloud-based collaboration service.

In Practice
Evaluate What Works and What Doesn’t
As each video conference, virtual meeting, or real-time collaboration session comes to an end, the project or team leader should carefully evaluate the tools and process to determine what could be handled better in the future, or what alternative (or additional) communication or collaboration tools could be used to further enhance productivity.

Workflow bottlenecks, human errors, security issues, incidents of miscommunication, or scheduling problems should be identified and evaluated so improvements can be made or fixes can be implemented in the future. Whenever possible, request feedback from collaborators and team members.

Develop a Meeting Plan
Virtual meetings, video conferences, and real-time collaboration sessions (where multiple people work together simultaneously) provide forums for people to exchange information, brainstorm ideas, and work as a cohesive group, even when everyone is in a different location.
To maximize the use of any virtual meeting or video conference tool, it’s important for the meeting host to create a detailed plan in advance of the meeting. Use these steps to create a plan:

1. Put someone in charge of the meeting.
2. Define meeting objectives.
3. Determine who needs to attend the meeting, conference, or virtual gathering, and what each person’s responsibilities or role will be. Convey this information to the participants in the meeting invitations or using a direct email message, for example.
4. Determine a date and time when you know most or all invitees will be available. This task is made easier if the company or team uses a group scheduling program.
5. Set a date and time for the meeting and send out invitations using the tools offered by the tool you’ll be using. Put someone in charge of managing RSVPs and reassigning meeting responsibilities if one or more people can’t attend.
6. Create a detailed meeting agenda that includes time estimates for each phase of the meeting.
7. Determine which meeting tools (white board, screen sharing, group chat, and so on) are necessary and outline how each will be used during each phase of the meeting.
8. Prepare and gather all documents or files that will be presented or used during the meeting. This might include PowerPoint slides, spreadsheets, or relevant documents.
9. Just prior to the scheduled meeting, make sure all documents and files are ready to present, and test out the technology to be used.
10. At the designated meeting time, have someone take attendance and make sure all invited participants are signed in and ready to go before the formal meeting starts. Work out any connection issues to the meeting platform.
11. If necessary, set ground rules for who can speak and when, or how and when the platform’s group messaging or file-sharing tools should be used.
12. Follow the meeting agenda as closely as possible, which allows everyone to stay on schedule for the rest of their day.
13. Invite questions or feedback at a designated time during or at the end of the meeting.
14. At the conclusion of a meeting, define what needs to be done next by participants. If necessary, set up the next meeting or a detailed plan of action for moving forward.
15. Follow up after the meeting with a summary of what transpired, distribute copies of relevant notes and files, and provide a link for participants to re-watch the video conference (if applicable). Make sure all participants understand how and where to access data, documents, files, and notes that were created or referenced during the meeting. The conference’s link can also be provided to invitees who could not attend the live meeting or conference but who need to catch up on what was covered.
Strategies for Effectively Using Chat or Group Messaging

When people use text messaging, instant messaging, or group messaging in conjunction with social media to interact with friends and family, there really are no rules. This applies to Facebook Messenger, Twitter, Instagram, SnapChat, and countless other social media services, as well as text messaging from any smartphone. In other words, you’re free to say whatever you want, whenever you want, with few or no consequences. You’re also free to use sentence fragments, slang, sexual innuendos, nicknames for people, all sorts of abbreviations, and emoji characters to help you communicate.

The text message, instant message, or group messaging service you use at work function pretty much the same way as the messaging tools offered by popular social media services, but the way you’re expected to communicate is very different. When you use these communication tools in a work setting, even if the people you’re communicating with are also your friends, it’s important to always maintain a professional demeanor.

It is the responsibility of the administrator or team leader to establish specific rules, policies, or guidelines for users to follow when engaged in work-related conversations using the designated text message, instant message, or group messaging service adopted by the company or team.

The following are strategies to use while using any type of messaging tool in a work environment:

- Always stay on topic.
- Create separate chats or message threads for specific subjects or projects.
- Refer to people within messages using their full usernames, not nicknames.
- Make sure everyone using the messaging service has completed their account profiles. Profiles should display full names, positions, and photos along with other relevant information. This is particularly important within large organizations where not everyone knows everyone else by name.
- Use complete sentences that do not include abbreviations or inappropriate emoji characters.
- If whatever you want to say would not be appropriate to say in person, on the phone, or via email with the person you’re communicating with in a work setting, don’t say it in a text message, instant message, or group message.
- Avoid discussing any highly personal or controversial topics that are outside the realm of what’s work related.
- Only include people in group message threads that need to be included and who are authorized to have access to whatever information will be discussed.
- Remember that the messaging service you’re using for work automatically maintains a complete transcript of all conversations, which is readily available to the account administrator and your superiors. Avoid saying nasty, discriminatory, or racist comments about your employer or coworkers.
For communication of something that only one other person within that chat needs to know, use the application’s direct message feature. Don’t share the message with the entire group.

If the messaging service permits, create descriptive chat room names or titles that are relevant to the topic being discussed.

Keep all conversations on one designated messaging service. When it comes to work-related conversations, avoid using social media platforms that aren’t company sanctioned or your personal social media accounts to communicate with co-workers or clients.

Avoid incorporating inside jokes or references that only select people in a group would understand or relate to.

Keep in mind that with most services, once a group message is posted or someone receives a direct message, the recipient is alerted immediately on their computer or mobile device. If you’re working with a group spread out over multiple time zones, or one person is working late into the night, refrain from posting messages that could disturb or wake people, unless it’s extremely important.

Ask each user to customize the notification settings in their accounts to prevent unimportant message notification messages from disturbing them when they’re busy with other tasks during the day or when they’re trying to sleep at night.

Never have arguments or unprofessional disagreements in a group forum.

Remember the age-old saying that goes “Think before you speak.” This guideline also applies when communicating through a messaging service. Before clicking Send, determine if your outgoing message could be misconstrued or misinterpreted in anyway.

**CAUTION**

**Proofread All Messages!**

Before sending any message to anyone in a work environment, always proofread what you’ve typed before clicking the Send button. This is particularly important if the autocorrect or spell-check feature is turned on. Especially if you’re typing a message quickly, while focusing on something else, it’s easy to make typos that could result in you sending an inappropriate or error-filled message.
Symbols

@ (at symbol), Slack Mentions, 245
@Mentions feature (Box), 71

A
access restrictions, 52
accounts
Box
  creating, 67-68
  customizing, 69-70
Cisco WebEx, 85-86
  creating, 88-91
Dropbox, signing out, 135
Evernote, 146
Office 365, 175
requirements, 11
Salesforce, creating, 204-205
signing out, 54
Skype
  number of, 220
  personalizing, 222-223
  privacy settings, 222
Slack. See teams, Slack
Trello
  creating, 260-262
  deleting, 267
  free, 259
  managing, 266-267
Actions (in Trello), 274-275
adapting to innovations, 278-281
  integrations between services, 282-283, 287
  Olivia Teich interview, 283-289
add-ons
  Box, 22
  Evernote, 144, 154
  Google Docs, 167
  Salesforce, 203
Admin (G Suite), 157
administrative tasks, Cisco WebEx, 93-94
administrators
  G Suite, 162
  Microsoft Exchange Online, 193
  Office 365, 176
    permission management, 40
    Salesforce, 204
Adobe Creative Cloud, 32
ADP Payroll, 32
Advanced plan (Dropbox), 123
analyzing work habits, 35
annotation features in DocuSign, 112
Apple iCloud, 2, 20
Apple iWork, applications in, 18
Atlas feature (Evernote), 149
at symbol (@), Slack Mentions, 245
attaching files
  Office 365, 182
  Slack Messages, 246
  Trello, 271
audio-recording tool (Evernote), 147
authentication
  DocuSign, 112-113
    two-factor authentication, 56-57
  automatic sign-in, 54
calendar, viewing in Salesforce, 208
Calling feature (Slack), 250-251
calls. See voice calls
cards (Trello)
   Actions menu, 274-275
   creating, 268-269, 275
   managing content, 269-272
   reorganizing, 273-274
certifications (security), 48-49
Channels (Slack)
   customizing, 253
   messaging in, 245-249
   switching between, 250
   topic-specific versus general, 253
   as virtual workspaces, 235
Chat feature
   Cisco WebEx, 98
   Google Docs, 165, 169
Chatter (Salesforce), 212
checklists (Trello), 271
choosing. See selecting
Cisco Jabber, 87
Cisco Spark, 23
   Cisco WebEx, compared, 85
   free trial period, 89
   general information, 84
   meetings, hosting/joining, 96
   mobile apps, 86-87, 93
   real-time collaboration in, 99-100
   subscription plans, 84-85
   team setup, 93
   training available, 88
Cisco WebEx, 22-24
   accounts, 85-91
   administrative tasks, 93-94
   best practices, 101
   Cisco Spark, compared, 85
compatibility, 83, 100
compliance regulations, 92
free trial period, 89
general information, 82-84
integration with Outlook, 96
Internet requirements, 83
meetings
   Chat feature, 98
   hosting, 96-98
   inviting attendees, 96
   locking, 99
   Polling feature, 98
   scheduling, 94-96
   mobile apps, 86-87
   popularity of, 22
   scalability, 84
   security, 23, 101
   subscription plans, 84-85
   training available, 88
   usage statistics, 83
   WebEx Meeting Center navigation, 92
cloud-based CRM (customer relationship
management) applications
   benefits of, 198-199
   free trial, 200
   list of, 199
   Salesforce. See Salesforce
cloud-based email
   Google Mail (Gmail), 170-171. See also G Suite
   Microsoft Exchange Online, 189-190
cloud-based file sharing. See files, sharing
cloud-based services
   adapting to innovations, 278-281
   evangelists for, 286
   feedback within, 285-286
   humanizing, 284-285
   integrations with other services, 282-283, 287
   Olivia Teich interview, 283-289
popularity of, 279
security concerns, 279-282, 288
training requirements, 287
cloud computing
advantages and disadvantages, 4
analyzing work habits, 35
backups and, 11
business benefits of, 5
defined, 3, 12
economic impact of, 4
Evernote and, 143
goals of, 3
public cloud services. See public cloud services
requirements
accounts, 11
compatibility, 19
hardware/software, 9
Internet access, 3, 10
security
forms of, 13
types of concerns, 5-6
testing services, 162-163
VPCs (virtual private clouds), 4
Cloud Security Alliance (CSA), 49
collaboration. See real-time collaboration;
names of specific collaboration tools
collaboration tools in Office 365, 181-186
comments
Dropbox Paper, 138
Office 365, 184-185
Trello cards, 270
Comment tool (Google Docs), 169
communications tools in G Suite, 170-171
compatibility
Cisco WebEx, 83, 100
ensuring for storage-syncing services, 36
Evernote, 143
G Suite, 158
Microsoft/Apple/Google services, 20
Office 365, 173-174, 186
OneDrive, 29
requirements, 19
compliance regulations, 48-52
Cisco WebEx, 92
Office 365, 177
compromised accounts, 6
Concur, 32
contacts
Salesforce, importing, 205-207
Skype, finding, 223
cost. See also subscription plans
cloud computing, 21
Evernote versions, 144
G Suite, 159-160
Microsoft Exchange Online, 190-192
Office 365, 175-177
Salesforce, 201-203
Skype, 217, 219
cost effectiveness of virtual meetings, 20
CRM (customer relationship management) applications, 13-14
benefits of cloud-based solutions, 198-199
free trial, 200
general information, 196-198
list of, 199
Salesforce. See Salesforce
CSA (Cloud Security Alliance), 49
customer support. See online support
customizing Box profile, 69-70
cybersecurity. See security
D
Dashboard (Salesforce), 211-212
data exfiltration, 6
Data Loss Prevent (DLP) feature (Microsoft Exchange Online), 191
deleting Trello accounts, 267
Digital Transaction Management (DTM), 103. See also DocuSign

Direct Messages (DMs) in Slack, 235, 244

direct messaging, 16

documents. See files

DocuSign, 24-25

advantages of, 103-107
annotation features, 112
authentication in, 112-113
file formats supported, 104
general information, 102-103
Gosner interview, 110-114
integration with, 25
intuitive nature of, 110
mobile app, 108-109
security standards, 107
subscription plans, 107
training tutorials, 114
usage statistics, 102

Downloading

Evernote, 145
files, 38
Office 365, 174
Skype, 220-221

Dropbox, 25-26

files
  scanning, 131-133
  searching, 118
  sharing, 119-120, 128-129
  storing, 118
  syncing, 121
general information, 116-118
installing, 124-129
integration with, 117
Internet requirements, 121
mobile app, 130-133
Olivia Teich advice, 283-289
security
  signing out of account, 135
  tips for, 140
  subscription plans, 122-124
tiered admin roles, 124
usage statistics, 117
website, 133-135

Dropbox Business, 117

Dropbox Enterprise, 117

Dropbox Paper, 26, 118, 122

content organization, 140
help features, 139
mobile app, 131, 139
real-time collaboration with, 135-139

DTM (Digital Transaction Management), 103. See also DocuSign

E

eDiscovery, 160

editing

  PDF files, 133
  profiles in Slack, 252-253
  records in Salesforce, 209-210

editing modes in Google Docs, 168

Einstein AI add-on (Salesforce), 203

email

  cloud-based
    Google Mail (Gmail), 170-171. See also G Suite
    Microsoft Exchange Online, 189-190
  sending files as attachments, 182

email addresses for Trello boards, 275

email domains, joining Slack Teams with, 243

emojis

  appropriateness of, 285-286
  Slack, 246

encryption in Evernote, 152

Enterprise plans

  Dropbox, 124
  Office 365, 177

E-Sign Act, 112
eSignatures, 24
evaluating real-time collaboration, 44
evangelists for cloud-based services, 286
Evernote, 26-27
   accounts, 146
   add-ons, 144, 154
   cloud computing and, 143
   compatibility, 143
   downloading and installing, 145
   files
      creating, 146-149
      organizing, 149
      sharing, 149-151
      syncing, 149-151
   general information, 142-143
   note-taking with, 146-149
   Office 365 versus, 154
   offline editing, 153
   real-time collaboration in, 152-153
   security, 152
   tags in, 149
   templates, 155
   Trello versus, 258
   updates, 144
   usage statistics, 143
   versions of, 144
Evernote App Center, 154
Evernote Basic, 144
Evernote Business, 144
Evernote Business for Salesforce, 154
Evernote Plus, 144
Evernote Premium, 144
Evernote Web Clipper add-on, 144
Exchange, 28
Exchange Online. See Microsoft Exchange Online

F
feedback within cloud-based services, 285-286
Ferrara, Jon, 52, 283
file formats, DocuSign support, 104
files
   attaching
      Trello, 271
      Slack Messages, 246
   creating in Evernote, 146-149
   downloading, 38
   editing in Salesforce, 209-210
   importing into Evernote, 147-148
   invitees, 38
   managing, 35-36, 71-73
      in Files app, 32
   naming, 35
   organizing in Evernote, 149
   owners, 38
   PDF files, editing, 133
   protecting, 41
   recovering, 25
   renaming in Office 365, 185
   scanning with Dropbox, 131-133
   searching, 15
      Box, 71
      Dropbox, 118
   sending as attachments in Office 365, 182
   sharing, 5, 15-16
      Box, 64-65, 73-76
      Dropbox, 119-120, 128-129
      Evernote, 149-151
   maintaining file control, 37-41
   Office 365, 181-186
   OneDrive, 177-181
   real-time collaboration versus, 16
   Salesforce, 209
   Skype, 218
   signing with DocuSign, 104-107
   storing, 14-15
Dropbox, 118  
Salesforce, 209  
syncing, 14-15  
Box, 68-69  
Dropbox, 121  
Evernote, 149-151  
versioning, 25

Files app, 32

file-storage and -syncing services
benefits of, 35  
Box, 63  
compatibility, ensuring, 36  
control of shared files, 37-41  
downloading files, 38  
Internet access requirements, planning for, 36-37  
managing files, 35-36  
permissions management, 39-40  
version histories, 41

finding contacts (Skype), 223

folders, managing in Box, 71-73

formatting
notes in Evernote, 147  
text in Dropbox Paper, 138

free accounts (Trello), 259

free trial period (Cisco WebEx and Cisco Spark), 89

Frontiers Events (Slack), 238

G

G Suite, 27-28
administrators, choosing and training, 162  
applications in, 18, 157-158  
Box integration, 22  
communications tools in, 170-171  
free trial, 161  
general information, 156-158  
industry-specific needs, 160  
Internet connection requirements, 158  
Microsoft Office compatibility, 158  
real-time collaboration with, 159, 163-169  
setup, 160-162  
training in, 162  
versions of, 159-160

G Suite Basic, 159
G Suite Business, 159
G Suite Learning Center, 162
G Suite Marketplace, 167
G Suite Training, 157
geo-tags (Evernote), 149
Gmail (Google Mail), 157, 170-171
Google+, 157, 170
Google Calendar, 157
Google Cloud Search, 157
Google Docs, 157
add-ons, 167  
editing modes, 168  
mobile app, 164  
offline editing, 167  
real-time collaboration with, 163-169

Google Drive, 2, 20, 27, 157
Google Forms, 157
Google G Suite. See G Suite
Google Hangout Meet, 157
Google Mail (Gmail), 157, 170-171
Google Sheets, 157
Google Sites, 157
Google Slides, 157
Google Two-Step Verification, 57
Google Vault, 157
Gosner, Tom (DocuSign CEO) interview, 110-114

group messaging, 16-17  
Cisco Jabber mobile app, 87  
strategies for using, 46-47

guest accounts (Slack), 244
Hangouts Meet, 170
hardware requirements
cloud computing, 9
Microsoft Exchange Online, 192
help features (Dropbox Paper), 139
Hillo for Trello app, 276
history of Trello, 257
Home plan (Office 365), 175
hosting meetings
Cisco Spark, 96
Cisco WebEx, 96-98
humanizing cloud-based services, 284-285

iCloud, 2, 20
importing
contacts in Salesforce, 205-207
files into Evernote, 147-148
individual plans (Box), 66
industry-specific needs with G Suite, 160
innovations in services, adapting to, 278-281
integrations between services, 282-283, 287
Olivia Teich interview, 283-289
insider threats, 6
installing
Dropbox, 124-129
Evernote, 145
Office 365, 174
Skype, 220-221
instant messaging, 16, 46-47
integration
between cloud-based services, 282-283, 287
Box, 22
DocuSign, 25
Dropbox, 117
Microsoft Exchange Online and Office 365, 190-192
Office 365, 186
Skype with Microsoft Office 365/Exchange Online, 218
integrations (Slack), 254
interactive polling, 17
Internet access
requirements
Cisco WebEx, 83
for cloud computing, 3, 10
Dropbox, 121
G Suite, 158
planning for, 36-37
Salesforce, 201
security of, 37
VPNs, 57
Norton Wi-Fi Privacy, 58-59
services for, 60
Internet-based storage. See cloud computing
invitees, defined, 38
inviting
meeting attendees (Cisco WebEx), 96
team members
Slack, 242-243
Trello, 263-265
iWork, applications in, 18

job searches (Slack), 238
keyboard shortcuts
Slack, 254
Trello, 267
keywords, 35, 149
L8r app, 276
labels (Trello), 271
legal issues (E-Sign Act), 112
lists (Trello), 258, 273
locking meetings (Cisco WebEx), 99
losing file control, 40
MailChimp, 32
managing
  files, 35-36, 71-73
  passwords, 54-55
  permissions, 39-40
    Trello card content, 269-272
marketable skill, Slack as, 238
meeting plans, developing, 44-45
meetings
  Chat feature (Cisco WebEx), 98
  hosting
    Cisco Spark, 96
    Cisco WebEx, 96-98
    inviting attendees (Cisco WebEx), 96
    locking (Cisco WebEx), 99
    Polling feature (Cisco WebEx), 98
  scheduling
    Cisco WebEx, 94-96
    Outlook, 96
Meetups (Slack), 238
Mentions (Slack), 245
messaging
  with Box, 70-71
  direct messaging, 16
  group messaging, 16-17
  instant messaging, 16
  proofreading messages, 47
    in Slack Channels, 245-249
  strategies for using, 46-47
  text messaging, 16, 224, 229-230
Microsoft Exchange, 28
Microsoft Exchange Online, 28
  general information, 189-190
  hardware requirements, 192
  integration
    Office 365, 190-192
    Skype, 218
  pricing plans, 190-192
  scalability, 190
  security, 189
  setup
    directly with Microsoft, 193
    via Microsoft Hosting Provider, 193-194
  updates, 190
Microsoft Hosting Providers, 176, 193-194
Microsoft Office 365. See Office 365
Microsoft OneDrive. See OneDrive
Microsoft OneNote, 154, 258
Microsoft SharePoint, 186, 188, 192
Miller, Alex, 279
mobile apps
  Box, 79-81
  Cisco, 86-87
  Cisco Spark, 93
  DocuSign, 108-109
  Dropbox, 130-133
  Dropbox Paper, 131, 139
  Google Docs, 164
  Office 365, 174
  Salesforce, 212-213
  Skype, 220
  Slack, 234
  Trello, 276
  Wi-Fi connectivity and, 86
Multi-Channel Guests (Slack), 244

n
naming files, 35
navigation of WebEx meeting center, 92
Nimble, 52
Norton Wi-Fi Privacy, 37, 58-59
notebooks (Evernote), 149
note-taking with Evernote, 146-149
notifications
  Slack, 249, 253
  Trello, 268
Office 365, 28-29
accounts, 175
administrator roles, 176
choosing plans, 187
collaboration tools in, 181-186
compatibility with, 158, 173-174, 186
collaboration tools in, 181-186
compatibility with, 158, 173-174, 186
download file requirements, 177
downloading and installing, 174
Evernote versus, 154
general information, 172-175
integration with, 17-18, 186
Box, 22
Microsoft Exchange Online, 190-192
Skype, 218
mobile apps, 174
OneDrive
services available, 178
sharing files, 177-181
Protect Document feature, 197
real-time collaboration, 185-186
usage statistics, 173
versions of, 175-177
offline editing
Evernote, 153
Google Docs, 167
OneDrive, 2, 20
compatibility, 20, 29
files, sharing, 177-181
services available, 178
OneDrive for Business, 29
OneNote, 154, 258
online collaboration. See real-time collaboration
online security. See security
online storage. See cloud computing
online support
Box, 81
Skype, 220
organizing files in Evernote, 149
Outlook, integration with Cisco WebEx, 96
owners, defined, 38
passwords, tips for, 52-55
PDF files, editing, 133
Penultimate add-on, 144, 154
permissions
managing, 39-40
for Team Members (Slack), 244
personalizing Skype account, 222-223
Personal plan (Office 365), 175
pinning Slack Messages, 247
Plus plan (Dropbox), 122-123
Polling feature (Cisco WebEx), 98
polls, 17
populating Trello boards, 268-269
Posts (in Slack), 236
Power-Ups (Trello), 259, 277
Premium 8 Plan (Cisco WebEx), 85
Premium 25 Plan (Cisco WebEx), 85
Premium 200 Plan (Cisco WebEx), 85
pricing. See subscription plans
privacy settings
Norton Wi-Fi Privacy, 59
Skype, 222, 232
Trello, 275
privileged user threats, 6
profiles
Box, customizing, 69-70
Skype. See accounts, Skype
Slack, editing, 252-253
proofreading messages, 47
Protect Document feature (Microsoft Office), 181, 197
protecting files, 41
public cloud services
backups and, 11
cost of, 21
demonstrations of, 3
Box, 21-22
Cisco WebEx, 22-24
DocuSign, 24-25
Dropbox, 25-26
Evernote, 26-27
G Suite, 27-28
Microsoft/Apple/Google services, 2, 20
Microsoft Exchange/SharePoint, 28
Salesforce, 29-30
Skype, 30
Slack, 30-31
specialized applications, 32
Trello, 31
selecting, 5-8
types of usage, 5, 8, 12
CRM tools, 13-14
group messaging, 16-17
interactive polling/Q&A sessions, 17
Microsoft Office 365 integration, 17-18
real-time collaboration, 18-20
sharing files, 15
syncing and storing files, 14-15
Punchtime for Trello app, 276

Q-R

Q&A sessions, 17
Rackspace, 51
real-time collaboration, 5, 8, 18. See also
names of specific collaboration tools
Box, 65-66
cloud-based file sharing versus, 16
cost effectiveness of, 20
Dropbox Paper, 135-139
evaluating, 44
goals of, 41-42
Cisco Spark, 99-100
Evernote, 152-153
G Suite, 159, 163-169
meeting plan development, 44-45
Office 365, 185-186
recording virtual meetings, 19
screen sharing/virtual whiteboards, 19
strategies for using, 42-44
voice calling/video conferencing, 19
recording virtual meetings, 19
records. See contacts; files
recovering files, 25
reminders (Evernote), 149
Reminders for Trello app, 276
remote storage, cloud computing as, 15
renaming files in Office 365, 185
reorganizing in Trello, 273-274
requirements for cloud computing
accounts, 11
compatibility, 19
compliance, Office 365, 177
hardware/software, 9
Microsoft Exchange Online, 192
Internet access, 3, 10
Dropbox, 121
G Suite, 158
planning for, 36-37
Salesforce, 201
resources for information, security, 60. See also online support
return on investment (ROI) for CRM applications, 198
revision history (Google Docs), 167
S
Sales Cloud, 201
Sales Cloud Lightning Enterprise, 202
Sales Cloud Lightning Professional, 202
Sales Cloud Lightning Unlimited, 203
Salesforce, 29-30
  account creation, 204-205
  add-ons, 203
  Chatter, 212
  Dashboard, 211-212
  editing records, 209-210
  file sharing/storage, 209
  general information, 200-201
  importing contacts, 205-207
  mobile apps, 212-213
  signing out, 214
  subscription plans, 201-203
  task lists, 211
  usage statistics, 201
  viewing calendar, 208
Salesforce IQ CRM Starter, 202
SAP Concur, 32
saving money on Skype voice calls, 226
scalability
  Cisco WebEx, 84
  Microsoft Exchange Online, 190
Scannable, 144, 154
scanning files with Dropbox, 131-133
scheduling meetings
  Cisco WebEx, 94-96
  Outlook, 96
screen sharing, 19
  Skype, 230-232
searching
  files, 15
    Box, 71
    Dropbox, 118
  in Trello, 265
security. See also privacy
  access restrictions, 52
  awareness of threats, 51
  Box, 66
certifications, 48-49
  Cisco WebEx, 23, 85-86, 101
  in cloud-based services, 279-282
  compliance regulations, 51-52
  DocuSign. See DocuSign
  Dropbox
    signing out of account, 135
    tiered admin roles, 124
    tips for, 140
  Evernote, 152
  forms of, 13
  Internet access, 37
  Microsoft Exchange Online, 189
  Olivia Teich interview, 288
  passwords, tips for, 52-55
  permissions, managing, 39-40
  Protect Document feature (Microsoft Office), 197
  protecting files, 41
  resources for information, 60
  Salesforce, 214
  Slack, 251-252
  strategies for, 50-53
  two-factor authentication, 56-57
  types of threats, 5-6, 49-50
  user errors, 53-54, 281
  video conferencing, 23
  VPNs, 57
    Norton Wi-Fi Privacy, 58-59
    services for, 60
selecting
  G Suite administrators, 162
  Office 365 plans, 187
  public cloud services, 6-8
sending files as attachments in Office 365, 182
setup

G Suite, 160-162
Microsoft Exchange Online
directly with Microsoft, 193
via Microsoft Hosting Provider, 193-194

SharePoint, 28, 186, 188, 192

sharing
files, 5, 15-16
Box, 64-65, 73-76
Dropbox, 119-120, 128-129
Evernote, 149-151
maintaining file control, 37-41
Office 365, 181-186
OneDrive, 177-181
real-time collaboration versus, 16
Salesforce, 209
Skype, 218
screen, 19, 230-232

Shopify, 32

Shortcuts menu (Dropbox Paper), 138

signing files with DocuSign, 104-107

signing out, 54
Dropbox, 135
Salesforce, 214

Single-Channel Guests (Slack), 244

Skitch add-on, 144

Skype, 30
accounts
number of, 220
personalizing, 222-223
privacy settings, 222
contacts, finding, 223
downloading and installing, 220-221
file sharing, 218
general information, 216-218
integration with Microsoft Office 365/Exchange Online, 218
online support, 220
screen sharing, 230-232
Skype for Business versus, 216
subscription plans, 219
text messaging in, 224, 229-230
video calls
disabling, 227
making/receiving, 226-228
tips for, 228
usage restrictions, 228
voice calls
cost of, 217
features available, 225-226
making/receiving, 223-225
saving money, 226
as VoIP service, 217

Skype for Business
features in, 232
file sharing, 218
general information, 216-218
integration with Microsoft Office 365/Exchange Online, 218
Skype versus, 216
subscription plans, 219
video calls
disabling, 227
making/receiving, 226-228
tips for, 228
usage restrictions, 228
voice calls
cost of, 217
features available, 225-226
making/receiving, 223-225
saving money, 226
as VoIP service, 217

Slack, 30-31
Calling feature, 250-251
Channels
customizing, 253
messaging in, 245-249
switching between, 250
topic-specific versus general, 253
as virtual workspaces, 235
communication efficiency in, 254
comparison with social media services, 246
Direct Messages (DMs), 235, 244
emojis in, 246
free guides, 236
Frontiers Events, 238
general information, 234-236
Integrations, 254
job searches, 238
keyboard shortcuts, 254
Meetups, 238
Mentions, 245
Posts, 236
profiles, editing, 252-253
security, 251-252
subscription plans, 236-238
Teams
account management, 248
creating, 239-242
guest accounts, 244
inviting members to, 242-243
notifications management, 249, 253
permissions, 244
upgrading accounts, 244
usage statistics, 236
Slackbots, 241
Slack Enterprise Grid plan, 238
Slack Free plan, 236-237
Slack Plus plan, 238
Slack Standard plan, 237
Smart Sync feature (Dropbox), 121
smartwatches, Skype for, 221
Smith, Ross, 162
social media services
comparison with Slack, 246
Google+, 170
software requirements for cloud computing, 9

Spark. See Cisco Spark
specialized applications with cloud computing, 32
Standard plan (Dropbox), 123
starring Slack Messages, 248
stickers, appropriateness of, 285-286
storage/syncing services
benefits of, 35
Box, 63
compatibility, ensuring, 36
downloading files, 38
managing files, 35-36
permissions management, 39-40
version histories, 41
storing files, 14-15
Dropbox, 118
Salesforce, 209
subscription plans
Box, 66-67
Cisco WebEx and Cisco Spark, 84-85
DocuSign, 107
Dropbox, 122-124
Evernote, 144
G Suite, 159-160
Microsoft Exchange Online, 190-192
Office 365, 175-177
Salesforce, 201-203
Skype, 217-219
Slack, 236-238
Trello, 258-260
switching
between Slack Channels, 250
between Trello boards, 262
syncing files, 14, 15
Box, 68-69
Dropbox, 121
Evernote, 149-151
The Treacherous 12: Cloud Computing Top Threats in 2016 (Cloud Security Alliance), 49

Trello, 31
  accounts
    creating, 260-262
    deleting, 267
    free, 259
    managing, 266-267
  boards
    creating, 262, 265-266
    email addresses for, 275
    populating, 268-269
    privacy settings, 275
    switching between, 262
    Welcome Board, 265
  cards
    Actions menu, 274-275
    creating, 268-269, 275
    managing content, 269-272
    reorganizing, 273-274
  checklists, 271
  Evernote/OneNote versus, 258
  general information, 256-258
  history of, 257
  keyboard shortcuts, 268
  labels, 271
  lists, 258, 273
  mobile app, 276
  notifications, 268
  online information, 268
  Power-Ups, 259, 277
  searching, 265
  subscription plans, 258-260
  teams, creating, 263-265
  third-party apps, 276-277
  Trello Business Class plan, 259
  Trello Enterprise plan, 260
  Trello Gold plan, 259
  TrePost-Trello app, 277
  two-factor authentication, 56-57

Tech support. See online support

Tech, Olivia, 283-289

Templates (Evernote), 155

Testing cloud-computing services, 162-163

Text, formatting in Dropbox Paper, 138

Text messaging, 16
  Skype, 224, 229-230
  strategies for using, 46-47

Think Cloud Compliance: An Introduction to Cloud Computing for Legal and Compliance Professionals (Microsoft Corporation), 52

Third-party apps
  Power-Ups versus, 277
  for Trello, 276-277

Threats. See security

Tiered admin roles (Dropbox), 124

Track Changes feature (Office 365), 182, 184

Training
  Cisco WebEx and Cisco Spark, 88
  cloud-based services, 287
  DocuSign, 114
  G Suite, 162

Translation in Skype for Business, 232

tables (Evernote), 147

tags, 35, 149

task lists (Salesforce), 211

teams
  Cisco Spark, setup, 93
  Slack
    account management, 248
    creating, 239-242
    guest accounts, 244
    inviting members to, 242-243
    notifications management, 249, 253
    permissions, 244
    upgrading accounts, 244
  Trello, creating, 263-265

technology support. See online support

Teich, Olivia, 283-289

Templates (Evernote), 155

Testing cloud-computing services, 162-163

Text, formatting in Dropbox Paper, 138

Text messaging, 16
  Skype, 224, 229-230
  strategies for using, 46-47

Think Cloud Compliance: An Introduction to Cloud Computing for Legal and Compliance Professionals (Microsoft Corporation), 52

Third-party apps
  Power-Ups versus, 277
  for Trello, 276-277

Threats. See security

Tiered admin roles (Dropbox), 124

Track Changes feature (Office 365), 182, 184

Training
  Cisco WebEx and Cisco Spark, 88
  cloud-based services, 287
  DocuSign, 114
  G Suite, 162

Translation in Skype for Business, 232
updates
   Evernote, 144
   Microsoft Exchange Online, 190
upgrading Slack accounts, 244
user error, as security problem, 53-54, 281

version histories, 41, 65
versioning, 25
Vick, Aaron, 280
video calls
   Skype
      disabling, 227
      making/receiving, 226-228
      tips for, 228
      usage restrictions, 228
   Slack, 250-251
video conferencing, 19. See also Cisco WebEx
   advantages of, 88
   Hangouts Meet, 170
   meeting plan development, 44-45
   security, 23
viewing calendar in Salesforce, 208
virtual meetings. See also Cisco WebEx
   advantages of, 88
   cost effectiveness of, 20
   developing plan for, 44-45
   Hangouts Meet, 170
   recording, 19
   Skype and Office 365, 219

virtual private clouds (VPCs), 4
virtual private networks (VPNs), 37, 57
   Norton Wi-Fi Privacy, 58-59
   services for, 60
virtual whiteboards, 19
virtual workspaces, Slack Channels as, 235

voice calls
   Internet-based, 19
   Skype
      cost of, 217
      features available, 225-226
      making/receiving, 223-225
      saving money, 226
   Slack, 250-251
voice over IP (VoIP), 217

Web Clipper add-on, 154
WebEx Meeting Center, navigating, 92
WebEx. See Cisco WebEx
websites (Dropbox), 133-135
Welcome Board (Trello), 265
Wi-Fi connectivity for mobile apps, 86
Wilder, Calvin, 281-282
Workday, 32
work habits, analyzing, 35