



Working *in* the CLOUD

Using Web-Based Applications and Tools to Collaborate Online

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Working in the Cloud

*Using Web-Based Applications
and Tools to Collaborate Online*

Jason R. Rich

PEARSON

800 East 96th Street, Indianapolis, Indiana 46240 USA

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

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ISBN-13: 978-0-7897-5902-3

ISBN-10: 0-7897-5902-0

Library of Congress Control Number: 2017945176

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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.

Acknowledgments

Thanks once again to Laura Norman and Greg Wiegand at Pearson Education for inviting me to work on this project and for their ongoing support. I'd also like to thank Charlotte Kughen and everyone else at Que whose talents helped to make this book a reality.

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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.

FYI: Analyzing Your Own Work Habits

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.

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