Tools to Thrive in a Digital World

Monica Nicosia, PhD, Nicosia Medical Writer LLC, Bryn Mawr, PA
Kathy Boltz, PhD, On Point Scientific, LLC, Phoenix, AZ

To participate
• Go to: www.pollev.com/monicanicosi713 or
• Text: MonicaNicosi713 to 22333
<table>
<thead>
<tr>
<th>What is your favorite Smithsonian museum?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Air and Space</strong></td>
</tr>
<tr>
<td><strong>African American</strong></td>
</tr>
<tr>
<td><strong>American Art</strong></td>
</tr>
<tr>
<td><strong>Natural History</strong></td>
</tr>
<tr>
<td><strong>American History</strong></td>
</tr>
<tr>
<td><strong>Other</strong></td>
</tr>
</tbody>
</table>
Monica’s Disclaimers

• Everything that I haven’t cited in this presentation is my personal opinion based on my research, experience, and personal preferences.
• I am not endorsing any particular products.
• I declare no potential conflicts of interest regarding the materials covered in this presentation.
Disclosures

• Opinions expressed are solely mine and do not reflect those of AMWA

• Married to software engineer, Chris Boltz
  • Chief Technology Officer/Chief Information Officer of On Point Scientific
  • Advises on technology choices and maintains technology for On Point Scientific
  • Provided guidance on this presentation
  • Hosting Product Leader for GoDaddy
Introduction
About Monica Nicosia, PhD

- **PhD**
- **Post Doc**

**Meniscus Limited**
- **1996-2005**
- **Traditional office**
- **Employer provided everything**

**Freelance**
- **2005-2014**
- **Self-employed**
- **Home office**

**Hayes Inc**
- **2014-2015**
- **Remote office**
- **Employer provided equipment**

**Freelance**
- **2015-Present**
- **Self-employed**
- **Home office**

[www.nicosiamedicalwriter.com](http://www.nicosiamedicalwriter.com)
Calling all self-employed AMWA conference attendees to take the:

2018 Freelance Medical Communicators Tools of the Trade Survey

Go to:
or
www.nicosiamedicalwriter.com and click the Freelance Survey tab on the navigation bar

Questions?
Contact: Monica Nicosia, PhD, at
Monica@NicosiaMedicalWriter.com

Why?
Provide data about the software, apps, and other tech tools you use in your work.

Help yourself and other freelances expand and upgrade your/their toolbox.

Receive a copy of summary findings.

Survey Closes: 12/20/2018 (tentative)
About Kathy Boltz, PhD

- Over a decade as a freelance medical writer
- Wide variety of projects
- Lifestyle includes working from many different places
- Lots of client facing, live meetings and travel
- Aiming to keep costs low and have excellent functionality from my technology choices
Which of these best describes you?

Freelance medical communicator

Employed medical communicator who works in the company office

Employed medical communicator who works remotely

Other
What topic are you most interested in this session? (Enter it as one word.)
Agenda

- Introductions
- Home office setups
- Data storage, access, backup, file sharing
- Website design and hosting
- Travel
- Data security, passwords, logins, phone
- Business software/apps
- Medical writing/editing software/apps
- Tips for shopping for digital tech tools
Familiar?

ARE YOU READY TO MEET ABOUT “DIGITAL TRANSFORMATION?”

WE CAN’T SEE YOUR SLIDES.

DO YOU NEED TO DOWNLOAD THE VIDEO PLUG-IN?


OK, I TRIED TO EMAIL THE SLIDE DECK BUT IT BOUNCED BACK.

OUR FILE LIMIT IS 1 MB.

DROPBOX? OR WETRANSFER?

BLOCKED BY OUR FIREWALL.

GOOGLE DOCS?

YEAH, RIGHT.

I’M NOT SURE HOW TO PRESENT TO YOU.

CAN YOU FAX IT TO US?

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Why Use Digital Tech?

• Time = money

• Digital tech can help:
  ▪ Improve efficiency and organization
  ▪ Reduce time spent on non-billable tasks
  ▪ Reduce time spent on boring/tedious tasks
  ▪ Make billable tasks more efficient
  ▪ Improve security
Home Office Setup
Monica’s Office

- Laptop (Lenovo ThinkPad X1 Carbon, Windows 10)
- Lenovo ThinkPad OneLink dock
- 2 monitors and stands
- Printer/scanner
- Keyboard
- Trackball
- WD My Passport external hard drive
- DVD drive
Home office setup

Wide monitor

Docking port
- Connects laptop to monitor, keyboard, mouse, speakers, and power

Ergonomic office chair

Wireless keyboard and mouse

Footrest

UPS (uninterrupted power supply)
### Our Main Digital Tech Tools

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Monica</th>
<th>Kathy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workhorse software</td>
<td>Office 2013</td>
<td>Office365</td>
</tr>
<tr>
<td>Pdf</td>
<td>Adobe Acrobat Standard XI</td>
<td>Adobe Acrobat Pro X</td>
</tr>
<tr>
<td>Citation management</td>
<td>Endnote, Zotero</td>
<td>Endnote</td>
</tr>
<tr>
<td>Backup</td>
<td>Mozy (cloud)</td>
<td>Synology RAID NAS</td>
</tr>
<tr>
<td></td>
<td>WD My Passport (external hard drive)</td>
<td></td>
</tr>
<tr>
<td>Data Sharing</td>
<td>Dropbox</td>
<td>Dropbox, OneDrive via Office365</td>
</tr>
<tr>
<td>Security</td>
<td>Norton Security</td>
<td>Windows Defender</td>
</tr>
<tr>
<td>Website host &amp; design</td>
<td>Wix</td>
<td>GoDaddy &amp; local graphic artist</td>
</tr>
<tr>
<td>Email</td>
<td>G Suite</td>
<td>Office365</td>
</tr>
<tr>
<td>Expenses, invoices,</td>
<td>FreshBooks</td>
<td>QuickBooks Pro, Toggl</td>
</tr>
<tr>
<td>estimates, time tracking</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Data Storage and Access
Data storage and access

**Local**
- You need to worry about if the hardware dies and its security
- You have your data on your hardware and don’t require internet access to get to it

**Cloud**
- You pay someone else to maintain it
- Your computer becomes a terminal to access your data and software
- If you are 100% on the cloud, you don’t need to back up your laptop
Data storage and access: File Sharing

- **Dropbox**
  - Allows collaborations
  - Significant drawbacks
    - Corporations block employee access
    - Clients may not have large enough account to access files
  - Can pay $$$ for cloud-based backup

- **Egnyte**
  - Clients can access password-protected files

- **OneDrive**
  - Allows client access to files. Client does not have to have an account to access.
  - Included in Office365 subscription
### File Sharing Comparison

- **Considerations:**
  - Storage capacity
  - Infrastructure
  - Level of service
  - Sharing features
  - Security
  - Platform and mobile compatibility
  - Integration

<table>
<thead>
<tr>
<th>Product</th>
<th>Dropbox Business</th>
<th>Egnyte Business</th>
<th>Amazon S3</th>
<th>Google Drive for Work</th>
<th>Microsoft OneDrive for Business</th>
<th>Box (for Business)</th>
<th>Jungle Disk</th>
<th>MozyPro for Business</th>
<th>ADrive Business</th>
<th>Livedrive for Business</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lowest Price</strong></td>
<td>$15.00</td>
<td>$8.00</td>
<td>Free</td>
<td>$5.00</td>
<td>$5.00</td>
<td>$15.00</td>
<td>$8.00</td>
<td>$13.98</td>
<td>$2.50</td>
<td>$50.00</td>
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<td>Active Directory</td>
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<td>✔</td>
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<td>Public Sharing</td>
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<tr>
<td>Authenticated External</td>
<td>✔</td>
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<td>✔</td>
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<td>✔</td>
<td>✔</td>
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<td>✔</td>
</tr>
<tr>
<td>Sharing</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
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<td>✔</td>
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<tr>
<td>Team Folders</td>
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<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
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<td>Group Permissions</td>
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<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
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<td>✔</td>
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<tr>
<td>Remote Wipe</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
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<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

Data Backup
<table>
<thead>
<tr>
<th>How do you backup your work computer?</th>
</tr>
</thead>
<tbody>
<tr>
<td>External hard drive</td>
</tr>
<tr>
<td>Online/cloud-based service</td>
</tr>
<tr>
<td>External hard drive + online/cloud-based service</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>No backup</td>
</tr>
</tbody>
</table>
A Lesson on the Value of Backing Up

- Bought new laptop
  - Smooth transition with Gmail and FreshBooks
  - Reinstalled software
  - Had to buy EndNote because lost serial number to activate program
  - Recovered files from backups
Which online/cloud-based service do you use to back-up your work computer?

Nicosia M. Results from the 2016 freelance medical communicator Tools of the Trade survey. AMWA J. 2017;32(3):105-112.
Some Online Backup Options

- **3-2-1 rule**
  - 3 copies of data at all time
  - 2 different types of storage
  - ≥1 copy of data is offsite

---

Data backup: How is it different from having data in the cloud?

**Online data storage**
- Protects your data against hardware failure
- Does not protect against user error, like accidentally deleting your file

**Backup strategy**
- Separate copies of your data
- If your working copy gets deleted, you can go back to a previous version

**Possible backup plans**
- Local
- Cloud
- Both (redundant backups)
Deciding how to backup your data

Evaluate risk and your comfort level with risk vs the cost to mitigate risk

- Local storage
  - One-time cost of ~$180 (12TB) to $300 (24TB)
  - You maintain it yourself and are responsible for keeping your software working
  - You are responsible for responding to any hardware issues, such as changing routers

- Cloud storage
  - Has ongoing costs ($600 to $2100/year for 500GB “premium” plan on Carbonite or Mozy)
  - But then someone else deals with it
Data backup using hardware

<table>
<thead>
<tr>
<th>Local backup generally uses a network-attached storage (NAS) drive or external hard drive</th>
</tr>
</thead>
<tbody>
<tr>
<td>• <strong>NAS drive</strong> is attached to your local network (generally your office router)</td>
</tr>
<tr>
<td>• External hard drive may be attached directly to your computer</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>RAID (redundant array of inexpensive disks)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Replicates copies of your data across those disks to protect against hardware failure of any individual disk; not a backup as you could still accidentally delete your file</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Backup is storing a separate copy</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Requires software to do this</td>
</tr>
<tr>
<td>• Synology sells NAS and external drives that come with included software to manage backups</td>
</tr>
</tbody>
</table>
Data backup using cloud options

- You can configure which data gets backed up.

Pros:
- Easier. “Let someone else do it.”
- Professional team manages data security.
- Systems are always patched and up to date.

Cons:
- Expensive. Annual cost.
- Limits the # computers/devices or storage space.
- Takes a long time the first time, like weeks if you have terabytes of data.
Do you have a business website?

Yes

No
What website hosting service do you use? (Enter it as one word.)
Website

• Creating your website
  • Website builders are commonly used for creating an initial website
  • WordPress is usually appropriate
    • Has some website builder-like features
    • More powerful but more complex to manage
    • You can build your own WordPress site from scratch, but it’s probably better to pay someone to do it.

• Hosting
  • Consider what you are doing with your website
  • If simply a portfolio website, cheaper shared hosting is probably sufficient.
Which Web Hosting Service Do you Use for your Business website?

Nicosia M. Results from the 2016 freelance medical communicator Tools of the Trade survey. AMWA J. 2017;32(3):105-112.
Website Builders

- Templates and tools to help design a site
- Features to facilitate mobile site design to make sure site looks good on computer and devices
- Tech support
- Not many offer mobility to another site builder

# Website Hosting

<table>
<thead>
<tr>
<th>Product</th>
<th>HostGator Web Hosting</th>
<th>TMD Hosting Web Hosting</th>
<th>DreamHost Web Hosting</th>
<th>Hostwinds Web Hosting</th>
<th>1&amp;1 Web Hosting</th>
<th>GoDaddy Web Hosting</th>
<th>SiteGround Web Hosting</th>
<th>Liquid Web Hosting</th>
<th>A2 Web Hosting</th>
<th>Media Temple Web Hosting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lowest Price</td>
<td>SEE IT</td>
<td>SEE IT</td>
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<td>SEE IT</td>
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<tr>
<td>Editors' Rating</td>
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<td>●●●●●● ●●●●●●</td>
<td>●●●●●● ●●●●●●</td>
</tr>
<tr>
<td>Maximum RAM - VPS</td>
<td>8GB</td>
<td>12GB</td>
<td>16GB</td>
<td>16GB</td>
<td>8GB</td>
<td>8GB</td>
<td>4GB</td>
<td>512GB</td>
<td>2GB</td>
<td>64GB</td>
</tr>
<tr>
<td>Maximum Storage - VPS</td>
<td>240GB</td>
<td>200GB</td>
<td>240GB</td>
<td>170GB</td>
<td>160GB</td>
<td>240GB</td>
<td>30GB</td>
<td>1.6TB</td>
<td>75GB</td>
<td>800GB</td>
</tr>
<tr>
<td>Maximum RAM - Dedicated</td>
<td>32GB</td>
<td>32GB</td>
<td>16GB</td>
<td>16GB</td>
<td>32GB</td>
<td>32GB</td>
<td>16GB</td>
<td>512GB</td>
<td>8GB</td>
<td>128GB</td>
</tr>
<tr>
<td>Maximum Storage - Dedicated</td>
<td>1TB</td>
<td>4TB</td>
<td>1TB</td>
<td>6TB</td>
<td>2TB</td>
<td>2TB</td>
<td>12TB</td>
<td>1,000GB</td>
<td>1TB</td>
<td>1TB</td>
</tr>
<tr>
<td>Unlimited Monthly Data Transfers</td>
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<td>✓</td>
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</table>

Travel
<table>
<thead>
<tr>
<th>Frequency</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td></td>
</tr>
<tr>
<td>1-3 times</td>
<td></td>
</tr>
<tr>
<td>a year</td>
<td></td>
</tr>
<tr>
<td>4-10 times</td>
<td></td>
</tr>
<tr>
<td>a year</td>
<td></td>
</tr>
<tr>
<td>Way too much!</td>
<td></td>
</tr>
</tbody>
</table>
Travel Apps

• Make your traveling life easier by downloading the relevant apps!
  • Airlines
    • Set up your account on airline apps
Travel Apps

• Hotels
  • Yes, it’s worth the effort to set up apps

• TripAdvisor, Google Trips
  • Use these to plan free time, find housing when you get to choose, find dining

• Conference apps
Travel Apps: Expensify

<table>
<thead>
<tr>
<th>Date</th>
<th>Merchant</th>
<th>Total</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jun 3</td>
<td>Taxi</td>
<td>$9.25</td>
<td>Transportation</td>
</tr>
<tr>
<td>Jun 4</td>
<td>Taxi</td>
<td>$8.00</td>
<td>Transportation</td>
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</tbody>
</table>

![Expensify logo](image)
### Travel Apps

![Expensify Logo](image)

#### Lodging -

<table>
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<tr>
<th>DATE</th>
<th>MERCHANT</th>
<th>TOTAL</th>
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<tbody>
<tr>
<td>May 31</td>
<td>Renaissance</td>
<td>$22</td>
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#### Meals - $9.00

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<tr>
<th>DATE</th>
<th>MERCHANT</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jun 1</td>
<td>American Airlines</td>
<td>$9.00</td>
</tr>
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</table>

#### Transportation - $258.19

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<tbody>
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<td>May 31</td>
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<td>May 31</td>
<td>Lyft</td>
<td>$55.24</td>
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<td>Jun 1</td>
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<td>$14.75</td>
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<tr>
<td>Jun 1</td>
<td>Taxi</td>
<td>$15.00</td>
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</table>

**Notes**

- The information on this receipt was manually entered. Please verify for authenticity.
- Billed expenses.
Equipment while traveling

- Laptop considerations
  - Features
  - Weight
  - Laptop stand and external keyboard
- Backup battery
- USB thumb drives
Travel: Data Security
<table>
<thead>
<tr>
<th>How do you access the internet while travelling?</th>
</tr>
</thead>
</table>

- Public wifi (eg, airport, coffee shop)
- Tethered to phone or Mifi device
- Virtual private network (VPN)
- I don't know
- I don't use the internet while travelling
Data security while traveling

- Going through Customs for international travel?
  - Hard shutdown on all electronics (laptop, phone, tablet) before passing through Customs
  - Sleep mode is inadequate

- Consider physical security of your knowledge
  - Sharing bench at conference

- Realize that someone can monitor internet traffic every time you connect to public wifi networks
  - Someone could be sitting in the same coffee shop collecting all your passwords
  - And reading your email if your email is using legacy protocols (POP, IMAP)
Data security while traveling: Encryption

- Recent move to use secure internet protocols
  - http vs https

- Encrypted communication protocol
  - Traffic is encrypted from point A to point B

- Unencrypted communication
  - Theoretically, anyone on your wifi network could be reading that traffic
  - Even if using https, they can still see what you are connecting to
Data security while traveling: VPN

- Use VPN
  - If connecting to public wifi, first connect to VPN
  - It’s like pulling the curtains
    - Now, the only thing anyone can see is that your data is going to that VPN address
      - WSJ: Why you need a VPN—and how to choose the right one.
        Sept 18, 2018

- VPN allows for privacy so others cannot monitor what you are doing, what websites you’re searching, and what the results are
Data security while traveling: Coffee Shop

• Coffee shop scenario. Do you connect to their wifi?
  • How many people are there?
  • How well do you know the shop?
  • Is it a busy enough place that someone could have compromised their router?

• Generally always safer to tether and use your own network (using your phone)
  • But, what are you doing?
  • Working with sensitive data, or watching YouTube videos?

• Safest to always use your own data and always use a VPN.
Security: Passwords, Logins, Phone
How do you manage your passwords?

Make a unique password for each website

Use same password (or variations) for every website

Use password manager
Passwords and logins: Breaches happen

• Your login is your identity
Passwords and Logins: Password Reality

- https://xkcd.com/936/
Passwords and Logins: Best effort to protect your identify and your data

• Best practice
  • Secure passwords everywhere
  • Different passwords for every account
  • Never reuse the same password
  • Use 2-factor authentication whenever it is available

• How?
  • Password manager software

• Reality: It’s all about risk mitigation
  • Reuse passwords for “throwaway” accounts
    • Does it have financial or lots of personal information?
Using a password manager

Browser extension for LastPass
Do you lock your mobile phone?

No, it's always unlocked.

Yes, it's locked (eg, pin number, face ID, fingerprint).
Your Phone

• Phones are becoming your
  • Identification
  • Banking information
  • Credit card
  • Passport (in some countries)

• Protect your phone!!!
  • Use a 6-digit PIN
  • Absolutely should have your phone locked, whether by PIN, touch ID, face ID, or whatever your device offers
Email and Software
Do you use a business email address?

Yes, (eg, email@mybusiness.com)

No, I use something like email@gmail.com or such
Email and Office 365

- Office 365 is a compelling solution for freelancers
  - Basically you are paying for the email
  - Office 365 subscription keeps your Office software updated
  - MS Office software is nearly universally used
Email Options

- Considerations:
  - Free or pay
  - Configuration and compatibility
  - Security and privacy
  - Antivirus and phishing detection
  - Balance cost, features, and risk

Another Review of Email Provider

1. Gmail
Google's webmail juggernaut needs no introduction

- Streamlined interface
- G Suite option gives you lots of power
- Paid plan isn't as cheap as some

2. Outlook
There's plenty of power here, especially for Office 365 users

- Focused Inbox is a smart feature
- Powerful events and calendar-related abilities
- Raft of app-based integrations

3. Yahoo Mail
A powerful offering with some surprisingly neat extras

- Useful extras like disposable email addresses
- 1TB of inbox storage
- Not as many low-level options as rivals

4. ProtonMail
Email with an emphasis on security and privacy

- Tight privacy features
- End-to-end encryption for messages
- Only 500MB of storage for free

5. Zoho
An email provider that gives you a lot for, well, nothing

- Free plan allows up to 25 users
- Freebie has features normally only in paid plans
- Also boasts office and collaboration tools

Business Management Software/Apps
Do you use software or an app to help you with accounting, invoicing, and/or time tracking?

Yes  

No
Which software or app do you use for accounting? (Enter it as one word.)
Which Software/App Do you Use for Accounting/Bookkeeping?

Nicosia M. Results from the 2016 freelance medical communicator Tools of the Trade survey. AMWA J. 2017;32(3):105-112.
Features of Online Accounting Services

• User-friendly interface and navigation
• Built-in options and integrated add-ons
  ▪ Expenses
  ▪ Payments collected
  ▪ Pay bills
  ▪ Built-in reports
  ▪ Invoices
  ▪ Estimates
  ▪ Time tracking
  ▪ Synch with bank and/or credit card accounts
  ▪ Accept credit card payments
  ▪ Mobile version
• Pay as you go (monthly or yearly fee)
• Versions with different levels of services and fees

A Review of Online Accounting Services

Accounting Services

- Pricing plans
  - Monthly
  - Yearly (discounts)
- Different levels of features
<table>
<thead>
<tr>
<th>Vendor / Category</th>
<th>Date / Source</th>
<th>Client / Description</th>
<th>Amount / Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia Parking Authority</td>
<td>10/14/2018</td>
<td>Nicosia Medical Writer</td>
<td>$48.00 USD</td>
</tr>
<tr>
<td>Nicosia Medical Writer</td>
<td>10/14/2018</td>
<td>Nicosia Medical Writer</td>
<td>$22.45 USD</td>
</tr>
<tr>
<td>Verizon Fios</td>
<td>10/12/2018</td>
<td>Nicosia Medical Writer</td>
<td>$25.00 USD</td>
</tr>
<tr>
<td>SurveyGizmo</td>
<td>10/09/2018</td>
<td>Nicosia Medical Writer</td>
<td>$35.00 USD</td>
</tr>
<tr>
<td>No Vendor</td>
<td>10/07/2018</td>
<td></td>
<td>$20.65 USD</td>
</tr>
</tbody>
</table>
Do you use software or app for time tracking?

Yes

No
What software or app do you use for time tracking? (Enter it as one word.)
Which Software/App Do you Use for Time Tracking?

Nicosia M. Results from the 2016 freelance medical communicator Tools of the Trade survey. AMWA J. 2017;32(3):105-112.
What to look for in time keeping apps

- Best free time-tracking app: Toggl
- Best apps for integrated invoicing: Harvest, FreshBooks, Paydirt
- Considerations to select your own:
  - Degree of complexity of your time tracking and invoicing
  - Whether you work alone or in teams
  - Whether you need to track time offline

<table>
<thead>
<tr>
<th>Product</th>
<th>Toggl</th>
<th>Harvest</th>
<th>FreshBooks</th>
<th>OfficeTime</th>
<th>Paydirt</th>
<th>Everhour</th>
<th>Freelancys</th>
<th>Hours</th>
<th>TopTracker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lowest Price</td>
<td>$5.00</td>
<td>Free</td>
<td>$15.00</td>
<td>$47.00</td>
<td>$8.00</td>
<td>$8.00</td>
<td>$29.20</td>
<td>$8.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Editors' Rating</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
<td>⭐⭐⭐⭐⭐</td>
</tr>
<tr>
<td>Price Per Person Per Month</td>
<td>$10</td>
<td>$12</td>
<td>$15</td>
<td>$47 One-Time Fee</td>
<td>$6</td>
<td>$7 ($95 minimum)</td>
<td>$29.2</td>
<td>$8</td>
<td>$0</td>
</tr>
<tr>
<td>Support for Integrations</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Great</td>
<td>Poor</td>
<td>Fair</td>
<td>Great</td>
<td>None</td>
<td>Poor</td>
<td>None</td>
</tr>
<tr>
<td>Free Version Available</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Collaboration Features</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Invoicing Included</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Expense Tracking</td>
<td>—</td>
<td>✓</td>
<td>✓</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Project Rate Billing</td>
<td>—</td>
<td>✓</td>
<td>✓</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Offline Timer</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Idle Detection</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Native Time Estimates</td>
<td>—</td>
<td>✓</td>
<td>✓</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Mobile Apps</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
</tbody>
</table>

## Working remotely through screen sharing

<table>
<thead>
<tr>
<th>Tool</th>
<th>Free Version</th>
<th>Lite Version</th>
<th>Security Concerns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Join.me</td>
<td>Free version is adequate</td>
<td>$10/month</td>
<td>PIN not needed to join call in my experience</td>
</tr>
<tr>
<td>WebEx by Cisco</td>
<td>$13.50/month for lowest service level</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zoom</td>
<td>Free version has 40-minute time limit on meetings</td>
<td>Pro is $15/month</td>
<td></td>
</tr>
<tr>
<td>Uber conference</td>
<td>Free but security concerns: PIN not needed to join call in my experience</td>
<td>Business plan is $15/month</td>
<td></td>
</tr>
<tr>
<td>Google Hangouts</td>
<td>Some client’s corporate systems may not allow access to gmail/Google accounts</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Medical Writing/Editing
Software/Apps
Which of the following reference management programs do you use most often?

- EndNote
- Mendeley
- Reference Manager
- Zotero
- Other
- None
Nicosia M. Results from the 2016 freelance medical communicator Tools of the Trade survey. AMWA J. 2017;32(3):105-112.
<table>
<thead>
<tr>
<th><strong>Comparison of Citation Management Tools</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EndNote</strong></td>
</tr>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td><strong>Cost</strong></td>
</tr>
<tr>
<td><strong>Learning curve</strong></td>
</tr>
</tbody>
</table>
| **Strengths** | • Excellent for organizing citations for papers and theses  
• Best option for major research projects, (offers the most options for customization and formatting)  
• Most output styles for formatting  
• Most customizable  
• Can handle a large amount of references | • Simple download of records  
• Good for managing a variety of formats, including webpages  
• Offers most functionality in a free, open-source product  
• Downloads records from with several databases that don’t work with EndNote and RefWorks, such as Factiva and USPTO | • Great for managing PDFs  
• Has a social aspect. Can see what other users are reading and citing. Find other members with common research interests.  
• Does an excellent job of pulling citation metadata from PDFs  
• Can share citations and documents with others |
| **How simple is it to import records?** | Simple to import records from most research databases | Very simple when resource is compatible with Zotero, need to verify that the records are complete after import | Very simple using the Mendeley browser plugin. However, the import doesn’t work with as many databases as other products. |

Other Potentially Useful Digital Tools

<table>
<thead>
<tr>
<th>Purpose</th>
<th>My Choice</th>
<th>Features</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>PDF unlocking</td>
<td>FreeMyPDF</td>
<td>Removes passwords and restrictions (eg, printing, copying text, highlighting text) from PDFs that you can open and read</td>
<td>Free</td>
</tr>
<tr>
<td>Full-text finder</td>
<td>Unpaywall</td>
<td>Open database harvests content from &gt;50,000 publishers</td>
<td>Free</td>
</tr>
<tr>
<td></td>
<td>(Chrome extension)</td>
<td>Makes it easier to find full-text PDFs (sometimes it links to the wrong article)</td>
<td></td>
</tr>
<tr>
<td>Proofing</td>
<td>PerfectIt</td>
<td>Checks consistency (eg, capitalizations, hyphenations)</td>
<td>$70/single user per 1 year; buy it through AMWA and get 30% discount; 14 day free trial</td>
</tr>
<tr>
<td></td>
<td>Proofreading</td>
<td>Locates undefined abbreviations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Software</td>
<td>Enforces style rules</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Customizable</td>
<td></td>
</tr>
<tr>
<td>Transcription</td>
<td>Transcribe</td>
<td>Helps transcribe audio file into text</td>
<td>$20 for 1 year license; an optional 60-min add-on pack for auto-transcribe costs $6</td>
</tr>
</tbody>
</table>
Results: Of 381 people who started the survey, 79% completed it. Participants were primarily from the United States (70%); 85% were women; 61% were 40 to 59 years old; 52% were time freelancers; and 67% were writers as their primary function. Most participants worked on laptops (63%) powered by Microsoft Windows (70%) and backed up with an external hard drive (66%) and/or an online/cloud-based service (52%). The most commonly used online/cloud based back-up services were Dropbox (29%), Carbonite (19%), and Google Drive (15%). Among the 52% survey responders (52%) who had a business website, 54% had designed it themselves, and 42% percent used spreadsheets and 20% did not use any software/app. For time tracking, 32% used spreadsheets and 35% did not use any software/app. Also, 42% did not use any citation/reference management software. When asked about the one essential tool they would recommend to colleagues, the most popular responses were Microsoft Word, Adobe Acrobat, and PerfectIt for the software/app category, and multiple and/or large monitors, a laptop, and an external back-up hard drive for the device category.
How to Shop for Tech Tools

Tips and insights
Considerations for Deciding to Use Digital Tech

- Which tasks could be done more efficiently?
  - Save time
  - Integrate into your work routines
- Make a list of must-have and nice-to-have features
- Decide on computer-based software versus web-based application
  - Do you need to be able to access it via mobile app?
  - Accessibility for your accountant, if you use one
  - Cost (one time fee or monthly/yearly subscription)
  - System and connectivity requirements
Tips for Finding Digital Tech

- Do your research
  - Google searches for reviews in blogs, computing magazines, other online resources targeted to small business and/or freelance
  - AMWA Engage
  - Recommendations from colleagues and friends
  - Check multiple sources for reviews and comparisons (be aware of potential biases)
  - Prioritize needs to narrow down choices
- Take advantage of free trials
- Don’t splurge for extra features you won’t use
- Don’t take forever to decide
Considerations and Tips

• Update, update, update
  • Computer operating system
  • Software
  • Phone operating system

• Plan
  • What would happen to you if your vendor suddenly went out of business?
Which single topic we covered was most helpful to you? (Enter as one word.)
Final Thoughts

• To do our jobs we have to be computer literate.
  ▪ We don’t have to be on the cutting edge.
  ▪ We also shouldn’t lag too far behind.

• Go for the middle ground and when affordable and convenient, take advantage of well-tested tech to help you be more efficient.

• Remember:
  ▪ Don’t be afraid to try new things.
  ▪ Back up your computer!
Questions?
Questions & Discussion

• If you want a copy of this slide set, send either one of us an email:
  ▪ Monica@NicosiaMedicalWriter.com
  ▪ Kathy@OnPointScientific.com

Thank you!