



Legal Tech Session Part 1

Focus on Excel

So what is the Legal Tech Audit?

The legal tech audit is a basic tech skills competency test.

- Designed by Casey Flaherty of Kia Motors, Inc.
- Used to assess the tech skills of firm associates
- Should be done in 1 hour (or less) to “pass”
- Firms that took the audit needed 2.5 to 8 hours!
- Provides mock assignments for EXCEL, PDF, WORD
- For more information about the audit: <http://www.legaltechaudit.com>

How are legal professionals using Excel?

- **Track Billable Time** – most frequent use of Excel in legal profession
- **Internal Reference** – status of cases, firm analysis, exhibit indexes, timelines
- **Trial Presentation** – timelines, competency in trial (ex. cross-examination of evidence)

Excel tips to remember:

- **Sum:** =SUM(cell range) Use the Sum formula when adding up a range of cells to find the total. Begin the formula with =, then SUM and in parentheses, enter the cell range you'd like to total up with a colon separating the two numbers. An example formula would look like this: =SUM(C4:C15). The next two formulas follow the same pattern.
- **Average:** To find the average value in a data set, use the Average formula. Enter =AVERAGE(cell range). Excel will add up the numbers in the range you set, and divide them by the number of cells.
- **Roundup:** Excel can round up to the nearest number you specify, and apply this to time as well. Enter =ROUNDUP((G2-F2)*24,1). Excel will use this to determine you are working with time and round up
- **Days 360:** Excel can calculate date ranges for you too. To find the number of days between two dates, enter =DAYS360((C7),(D7),FALSE).
- **Other Important Items:** Being able to reference another sheet, sorting data, and formatting text and integers will help simplify your spreadsheets and minimize your time and effort!
- **Auto-Features in Excel:** Using auto features like auto-fill, auto-sum and auto-fit can speed up your productivity no matter what type of data you are dealing with.
- The list above as well as the material covered in this session only highlight some of the skills a legal professional may utilize in practice. **The best way to develop skills in Excel is to start with a template, click around and explore.** Using your own personal budget is an excellent starting point for any beginner in Excel to practice the basics!

Presentation Slides:

- <https://prezi.com/hoqz1bxko5km/legal-tech-session-focus-on-excel/>

Exercise & Assessment Templates:

- Exercise #1 – Sample Budget Template: http://www.law.uga.edu/sites/default/files/budget_template.xlsx
- Exercise #2 – Billable Time Template: http://www.law.uga.edu/sites/default/files/billing_template.xlsx
- Exercise #3 – Firm Analysis Template: http://www.law.uga.edu/sites/default/files/analysis_template.xls
- Excel Assessment Instructions / Raw Data: http://www.law.uga.edu/sites/default/files/excel_instruction.docx
- Excel Assessment Template: http://www.law.uga.edu/sites/default/files/excel_assessment_template.xlsx

How can I earn the Tech Audit Readiness certificate?

- At each tech session, assessments will be given to students in the form of software-specific files with instructions for completing a number of simple tasks. Links are located on this handout (above).
- Using the appropriate program and the skills you learned in the session, complete each assessment.
- When you have completed all three assessments, save and upload your files using our online upload:
 - <http://www.law.uga.edu/legal-tech-audit> The deadline to submit is March 27, 2015.
- You will receive an email confirmation in return letting you know that we have received your assessment files. You will be notified by email if you did or did not pass the assessments.
- If you pass the assessment a certificate will be available for you to pick up in the library.

Additional Resources:

- Full list of items the legal tech audit covers:
http://www.legaltechaudit.com/projects/LTA_Feature_List.pdf
- Legal Tech Audit video: <https://www.youtube.com/watch?v=KOfC5jQ0H6Y>
- Excel Template for Attorney Billing Timesheets:
<http://www.esquiremac.com/storage/Excel%20Billing%20Template.xls>
- Microsoft Excel's Law Firm Project Tracker Template: <http://office.microsoft.com/en-us/templates/law-firm-project-tracker-TC001140479.aspx>
- Litigation Task-Based Budget Excel Spreadsheet Template: <http://hytechlawyer.com/?p=2361>
- Time Tracking Template for Lawyers: <http://www.vertex42.com/ExcelTemplates/time-tracker.html>
- Excel for Litigators: <http://cogentlegal.com/blog/2014/06/excel-for-litigators/>
- Law Practice Management Advisor on how lawyers can use Excel:
<http://www.esquiremac.com/blarg/2009/5/5/excel-and-numbers-templates-for-attorney-billing-timesheets.html>
- Download Excel (and other Microsoft Office programs) for free through UGA at: <http://ugamail.uga.edu>