

Event Title:

MS Word, Outlook, and Excel Secrets Only the Top Paralegals Know

Event Date and Time:

June 19, 2024 -- 10:00 AM EDT - 05:00 PM EDT

Event Agenda:

All times are shown in Eastern time.

I. Paralegal Tips and Tricks for Using Microsoft Word in the Law Firm

10:00 - 11:00, Katie Brown

- A. How to Customize Word's Settings: Quick-Access Toolbar, Ribbons, Status Bar, etc.
- B. Using Building Block and AutoText
- C. Top 5 Tips for Publishing and Collaborating Within Microsoft Word
- D. Shortcut Keystrokes Every Paralegal Needs to Know
- E. Automating Legal Forms and Templates
 1. How to Build Reusable Legal Templates
 2. Customizing Legal Forms for Different Contexts: Essential Guidelines
- F. Creating a Table of Authorities

II. How to Become a Paralegal Power User of Microsoft Word

11:00 - 12:00, Jack R. Luellen

- A. Practical Guide to Reviewing Documents: Track Changes, Comments, Legal Blackline, etc.
- B. File Conversion Within Word
- C. Document Organization and Navigation
- D. Formatting Made Simple (Paragraph Numbering, Indents, Spacing, etc.)
- E. Headers, Footers, Page Numbering, Tables, etc.
- F. How to View Two Sections of a Document at the Same Time

III. Microsoft Outlook Tips and Tricks for Paralegals

12:15 - 1:00, Jack R. Luellen

- A. Best Practices for Taming Your Inbox
- B. Tips for Optimizing Your Schedule and Calendar
 1. Guidelines for Scheduling and Managing Appointments
 2. How to Use Outlook to Track Legal Deadlines
- C. Managing Reminders and Tasks
- D. Strategies for Managing Contacts
- E. How to Delay-Send Emails
- F. Filtering and Search Techniques

IV. Techniques for Using Microsoft Excel in the Law Firm

1:00 - 2:00, Katie Brown

- A. Best Practices in Color-Coding and Formatting Spreadsheets
- B. Styles: What You Need to Know
- C. Primer on Sorting and Grouping
- D. Using Excel and Word Mail Merge Features
- E. Useful Tips for Using Excel for Data Analysis Purposes
- F. How to Use Excel for Data Visualization

V.

Utilizing Intermediate Excel Features

2:30 - 3:30, *Katie Brown*

- A. Protecting Workbooks and Worksheets: Legal Best Practices
- B. Tips for Creating Simple and Compound Formulas
- C. Using Pivot Tables and Pivot Charts for Paralegals
- D. Consolidating Worksheets
- E. Timesaving Keystrokes
- F. Practical Microsoft Excel Applications for Paralegals

VI. **Critical Collaboration Tools and Tactics for Paralegals**

3:45 - 4:30, *Jack R. Luellen*

- A. Insights on PDFs: Creating Searchable Files and Interactive Forms and Beyond
- B. Using Microsoft OneNote to Improve Collaboration
- C. Best Practices for Creating an Electronic Notebook
- D. Organizing and Memorializing Notes
- E. Essentials of Accessing and Updating Electronic Notes
- F. Overview of SharePoint and OneDrive

VII. **Cybersecurity Tips and Traps**

4:30 - 5:00, *Katie Brown*

Event Description:

Build your skills! In this practical, paralegal-focused guide, our expert faculty reveal the latest tips and tricks for using Microsoft Word, Outlook, and Excel in the law firm. From essential guidelines to publishing and collaborating in Word to best practices for protecting worksheets and workbooks, this course has it all. Register today!

- Get guidance for maximizing your use of Microsoft Word.
- Enhance your productivity with nifty Microsoft Outlook tips and tricks.
- Improve your Microsoft Excel skills.
- Discover useful collaboration tools for the law firm.
- Know the latest cybersecurity threats to legal departments.

**Any mention of specific products in this program is intended as part of a general overview and does not constitute IPE's endorsement or recommendation of any specific product or provider. This program is not sponsored by any technology or electronics provider.*

Who Should Attend:

This **intermediate level course** will provide attendees with tips and tricks for mastering Microsoft Word, Outlook, and Excel. Those who should attend include:

- Paralegals
- Legal Technicians
- Legal Assistants
- Legal Support Staff

Event Bio:

[Katie Brown](#) is the Associate Dean for Information Resources at Charleston School of Law. Her research and scholarship interests are in the areas of intellectual property, acting skills for lawyers, law and literature, management, and a variety of legal research related topics. Ms. Brown has taught specialized, beginner, and advanced legal research courses and seminars on legal technology for practice, art of advocacy, and contracts. She is a very active member of the American Association of Law Libraries (AALL). Ms. Brown has participated in a variety of leadership roles throughout the association chapters and special interest sections. She earned her B.F.A. degree from DePaul University, her master's degree in library and information science from the Drexel University iSchool and her J.D. degree from Seattle University School of Law. In 2024, Katie Brown also received the Inaugural Technology & Ethics Award from the Association of American Law Schools Section on Technology, Law and Legal Education (AALS).

[Jack R. Luellen](#) is special counsel with Buchalter in the firm's Denver Office. His practice is primarily dedicated to oil and gas law, with a particular emphasis on litigation. Mr. Luellen earned his B.S. degree, with distinction, from Colorado State University and his J.D. degree, cum laude, from the University of Minnesota Law School. He is admitted to practice in California, Colorado, Utah and North Dakota. Mr. Luellen is a member of the Rocky Mountain Mineral Law Foundation and Energy Mineral Law Foundation.