Legal Tech Skills Survey

The purpose of this Legal Tech Skills Survey is to assist you in determining whether you should take one or more of the Technology for Lawyers skills courses offered as part of UCLA Law's Program on Professional Development. Courses are offered in Microsoft Word, Excel, PowerPoint and Adobe.
This survey is for your benefit. You do not turn it in.

Please review the following tech skills list for Microsoft Word, Excel, PowerPoint, and Adobe. Check the appropriate box to the left of each task/skill. With respect to each software program, if you check "Like to learn how to do" for four boxes or more, we strongly recommend that you take the technology skills training for that software program offered in the Program on Professional Development during J-Term 2021.

Microsoft Word

Like to learn how to do	I can do this	Task/Skill
		Format Text, Paragraphs and Documents *(Spacing, Indents, Tabs, Margins)*
		Number Paragraphs; Legal style Numbering *(use Multilevel lists)*
		Use Styles *(avoids manual formatting each section of a legal doc)*
		Set up a Table of Contents and Table of Authorities *(Automatic Headings with Page Numbers & list of Citations)*
		Find and Replace; Footnotes; Insert Symbols
		Insert a Table *(Set up Rows & Columns; change Table design/layout)*
		Cross-Referencing, Hyperlinks, Bookmarks *(Allows user to jump to specific content in legal docs)*
		Section Breaks with Headers/Footers *(e.g. Set up different page numbering in each section)*
		Set up a Legal Template *(To apply to new documents; e.g. Pleading Paper)*
		Set up a Mail Merge to merge a form letter with a list
		Review documents: Track Changes and Comments *(Includes compare - legal blackline)*
		Clean and Protect Legal Documents *(Remove hidden info, set passwords, restrict editing)*
		Set up Quick Parts *(How to insert Automatic Text and Fields)*

Microsoft Excel

Like to learn how to do	I can do this	Task/Skill
		Design spreadsheets; Move, Copy, Edit & Format Data
		Insert Basic Formulas *(Add, Subtract, Multiply, Divide, Automatic Sum, Average)*
		Create Charts to illustrate legal data *(Column, Line, Pie)*
		Sort & Filter legal data *(To organize and manipulate large lists)*
		Page Setup and Print Options *(Scale to Fit, Margins, Footers, Print Titles)*
		Run Conditional Functions (IF, SUMIF, COUNTIF) *(Evaluate criteria; one result if true, another result if false)*
		Conditional Formatting *(Format & colorize data based on certain rules)*
		Link and Manipulate worksheets *(Changes in one sheet updates another sheet, copy/move sheet)*
		Create a Legal template with Styles and Protection *(Fill in data only in certain areas; prevent deleting formulas)*
		Insert Tables to organize and analyze data
		Create a Pivot Table Report *(Quick summary reports of list categories)*
		Use Lookup Functions *(Automatically looks up legal data)*
		Use Financial Functions *(Net Present Value, Future Value, Payments)*
		Use Statistical Functions *(Standard Deviation in a Legal Case)*
		Run Data Tools *(Removes duplicates, creates drop down lists, separates data)*
		What-if Analysis Tools *(Goal Seek, Data Table…answers "what if" questions)*

Microsoft PowerPoint

Like to learn how to do	I can do this	Task/Skill
		Add Designs to Presentation *(Automatic mix of fonts, colors, shapes, formats)*
		Create Text Layout Slides *(Title, Bulleted text, and Text Boxes)*
		Work with the Slide Master View *(Place Logos, Pictures, Footers on selected slides all at once)*
		Insert Shapes, Pictures, and Icons
		Create SmartArt diagrams *(Includes organization charts)*
		Insert Tables *(Set up rows and columns filled with PowerPoint or Excel data)*
		Insert Charts to illustrate legal data *(Create Column, Line, Pie charts...import Excel data)*
		Insert Screen Shots and Document Callouts *(Includes cropping legal docs for emphasis)*
		Create Timelines *(show an animated timeline of events in a legal case)*
		Animate Text, Shapes, Pictures and other slide content *(Includes sequencing animation steps and other options)*
		Add Special Effect Transitions between slides
		Record Slide Narration and Timings; Insert Video
		Add Speaker Notes and run Slide Show tips
		Export and Import Data with Word & Excel
		Use Presenter View *(audience sees slides while presenter sees slides with notes)*
		Create PowerPoint Templates *(to apply to new presentations)*

Adobe Acrobat (PDF)

Like to learn how to do	I can do this	Task/Skill
		Create a PDF file; Export to a PDF file *(MS Office docs, scanner, web, and other sources)*
		Combine Multiple PDFs into one Master file
		Combine Multiple PDFs into one Portfolio *(how to Package a collection of PDFs)*
		Use Bookmarks to Navigate a PDF
		Edit PDFs *(Add text, images, headers/footers, watermarks, links)*
		Organize PDFs *(includes extracting pages to a new file)*
		Index Legal Docs (Bates Numbering) *(Identify each page automatically with a unique number)*
		Annotate Legal Docs *(Comments, Sticky Notes, Stamps, Highlighting)*
		Protect PDFs *(Remove Hidden Info, Set Passwords, Restrict Editing)*
		Redact PDFs *(Permanently delete sensitive info from legal docs)*
		Fill and Sign PDFs
		Create PDF Fill-in Forms

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