

# 2018 National Legal Research Teach-In Kit

Research Instruction & Patron Services  
Special Interest Section  
American Association of Law Libraries

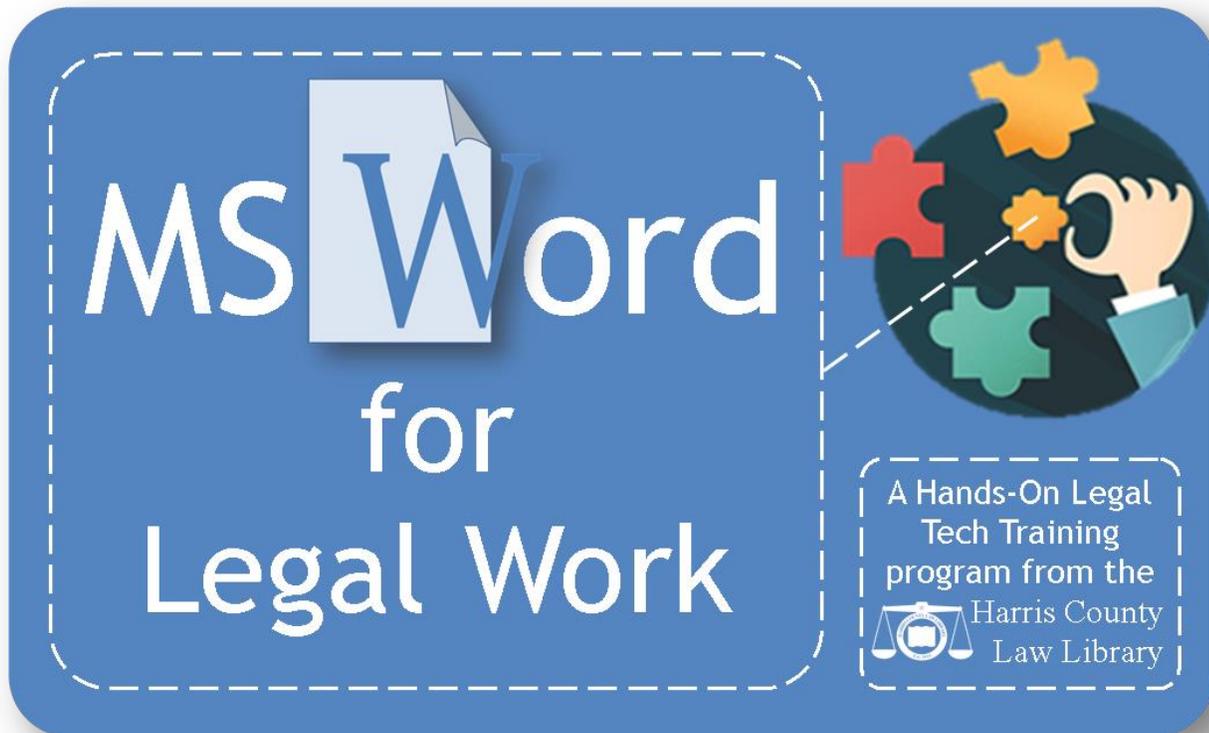
In October, 2016, the Harris County Law Library launched a new venture, the Legal Tech Institute (“LTI”). LTI is an ongoing series of free learning opportunities focused on helping both attorneys and the public use technology for more efficient legal work. LTI provides technology skills training and free continuing legal educational opportunities for a wide cross-section of Law Library patrons, including both attorneys and self-represented litigants.

LTI was developed with the goal of reducing technology barriers faced by individuals interacting with the legal system. This may include providing training directly to self-represented litigants who need to use Microsoft Word to draft pleadings, or it might involve assisting solo and small-firm practitioners in developing the tech skills they need in their practice. In either case, we are satisfying an unmet need by providing tools for effective legal research and efficient document preparation.

LTI continues to grow with an ever-expanding menu of learning opportunities both in person and online. Our latest effort is the development of a new LTI component, Hands-on Legal Tech Training, made possible by a generous grant from the Texas Bar Foundation, which funded our purchase of 22 training laptops. Our hands-on programs, which offer free CLE credit for licensed Texas attorneys, are held in our Legal Tech Lab, a 9-seat training space nestled in the stacks. What follows is an outline of the skills we cover in our course, *MS Word for Legal Work*. The outline is divided into three sections: Get Started, Level Up, and Go Pro. Each section is further subdivided into groups of tasks with increasing levels of difficulty. This exposes all users to a variety of skills with a wide range of complexity and applications. The outline concludes with a brief list of additional resources for further learning.

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A blue rounded rectangle with a white dashed border. On the left, the text "MS Word" is written in white, with "MS" in a large font and "Word" in a smaller font. Below "MS Word" is the word "for" in a smaller font, and below that is "Legal Work" in a large font. To the right of the text is an illustration of a hand placing a puzzle piece into a globe. The globe is dark blue with several colorful puzzle pieces (red, orange, green, yellow) attached to it. A white dashed line connects the hand to the globe. Below the globe is a small white box with a dashed border containing the text "A Hands-On Legal Tech Training program from the Harris County Law Library" and a small icon of a scale of justice.

MS Word  
for  
Legal Work

A Hands-On Legal  
Tech Training  
program from the  
Harris County  
Law Library



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# Hands-on Legal Tech Training

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## Program Overview

Welcome to the Hands-on Legal Tech Training program from the Legal Tech Institute at the Harris County Law Library! We are happy to offer this series of free courses to help you learn the tech skills you need to complete your legal work. Each course offers hands-on training, so you can practice the skills as you learn them for better retention. Laptops are provided onsite through a generous grant from the Texas Bar Foundation. Our aim is to provide practical, experiential learning for everyone from tech novices to tech experts. Hands-on Legal Tech Training sessions incorporate different skill levels, each identified in the Course Catalog with a proficiency indicator:

Get Started,

Level Up,

Go Pro.

Now, everyone from recent law school graduates to experienced attorneys as well as members of the public have a resource for learning about legal tech trends, acquiring legal tech skills, and earning free CLE credit in a unique learning environment at the Harris County Law Library.

# MS Word for Legal Work

## Why learn Word?

Tech is no longer a novelty but a necessity.

- Microsoft Office is the leading office suite in business and legal industries. According to Microsoft (2016), there are 1.2 billion Office users worldwide.
- MS Word contains tools for drafting, document assembly, collaboration, and security.
- The American Bar Association MRPC 1.1, Comment 8 says that a competent lawyer must keep abreast of changes in technology and be aware of the benefits and risks of using technology in the practice of law.
- The TRCP 21(f) and the Texas Judicial Committee on Information Technology have established standards for tech proficiency regarding the e-filing of court documents.
- Casey Flaherty of KIA motors established the Legal Tech Audit after administering a tech skills inventory to outside council, none of whom could complete the assigned tech tasks.

# MS Word for Legal Work

## What to learn about Word?

### Get Started

This 20-minute course will start with an overview of the Ribbon and Quick Access Toolbar, including a brief tour of frequently used features in Word. Skills covered will include:

#### Controls

- Input: Hot Keys, Click & Drag, Right Click
- Toolbar: Quick Buttons, Tabs, Ribbon, Dialog Launchers
- View: Reduce/Expand, Rulers, Split Window

#### Text

- Direct Text Formatting: Font, Font Size, Bold, Italics, Strikethrough
- Duplication: Cut/Paste, Format Painter

#### Paragraph & Page

- Paragraph Formatting: Spacing, Alignment, Show/Hide Paragraph Markups
- Page Layout: Orientation, Watermarks, Line Numbering

# MS Word for Legal Work

## What to learn about Word?

### Level Up

This 20-minute course will build on the foundation of the introductory course and offer time-saving tips for formatting, editing, and saving documents as required for e-filing in Texas. Skills covered will include:

#### Basic Automation

- Using Styles
- Find & Replace
- Page/Section Breaks, Headers/Footers, Page Numbers, Quick Parts

#### Litigation Necessities

- Insert Hyperlinks & Symbols
- Margins, Ruler, Tabs - How to Create the Style of the Case
- Convert to PDF/A for e-Filing

# MS Word for Legal Work

## What to learn about Word?

### Go Pro

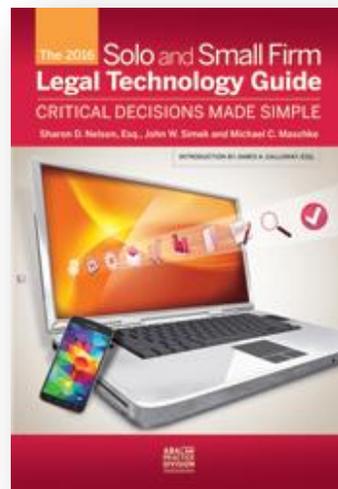
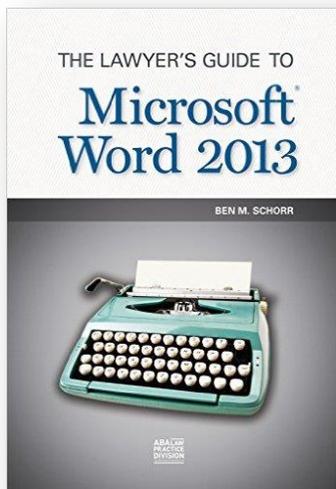
This 15-minute advanced session will provide resources for assembling a briefing toolkit. Learn to insert page and section numbers, create automatic tables of authorities, and edit with style(s). Skills covered will include:

#### Power Tools

- Table of Authorities
- Create Templates - For client letters, frequently used forms
- Track Changes and Markup
- Compare Versions of a Document
- Permissions/Access to a Document
- Prepare Document for Sharing - Metadata Inspector

# MS Word for Legal Work

## Further Reading



## OfficeForLawyers

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