

## Program Descriptions

### AM: Using Excel 2007/2010 in a Law Practice

If you have Microsoft Office, then you also have Microsoft Excel, and it's time you started putting it to use. This seminar will show you the features of Excel 2007 and 2010 and how a powerful spreadsheet program can improve a lawyer's work and make life easier. We will show you how to create amortization schedules, real estate closing statements, disbursement schedules, medical bill summaries, docketing schedules, fiduciary accountings and graphs of your data (pie charts, bar graphs, etc.). We will also explain how to use Excel to manage lists and how to use Excel as a data source for merging names and addresses into envelopes, labels and letters. Finally, if you are frustrated with the limited functionality of Microsoft Word tables, we will show you how Excel eliminates those limitations and various ways that spreadsheets can be inserted directly into your Word documents.

### PM: PowerPoint 2007/2010 for Legal Professionals

The use of PowerPoint in the legal profession is invaluable, both in and out of the courtroom.

This course is designed specifically for judges and lawyers in all practice areas, in that it explicitly focuses on presentations that are extremely unique to the legal profession.

Just a few of the ways that PowerPoint can help legal professionals include opening and closing arguments in trial; presentations at mediation or arbitration; and presenting complicated legal concepts to clients so they can better understand the legal issues involved. More judges are using PowerPoint to introduce rules and protocols in the courtroom, including instructions to the jury.

## Featured Speakers

### Barron K. Henley, Esq. Affinity Consulting Group

Barron Henley is an attorney, a "legal technologist" since 1990 and a founding member of his firm. He received his B.S./B.A. (marketing and economics) and J.D. from The Ohio State University and is a member of the American, Ohio and Columbus bar associations and the Worthington Estate Planning Council. Henley teaches continuing legal education classes covering practice management, document management, electronic case filing, Word, Excel, Outlook, WordPerfect, HotDocs® document assembly, and many other topics. He is a frequent continuing legal education speaker on legal-specific technology issues for state and local bar associations and CLE providers throughout the United States.

### Paul J. Unger, Esq. Affinity Consulting Group

Paul J. Unger, Esq. is the CEO of HMU Consulting, Inc., and founding principal of Affinity Consulting Group, Inc., a nationwide consulting company providing legal technology consulting, training and continuing legal education. Unger serves as chair of the American Bar Association TECHSHOW planning board. He is a member of the American, Ohio State and Columbus bar associations, ACLEA, Ohio Association for Justice and the American Society of Trial Consultants. He has delivered hundreds of legal technology CLE seminars across the country and is a frequent lecturer for the Ohio State Bar Association.

NON-PROFIT ORG.  
U.S. POSTAGE  
**PAID**  
Columbus, Ohio  
Permit No. 603

OHIO STATE BAR  
ASSOCIATION  
CLE

P.O. Box 16562  
Columbus, OH 43216-6562

Return Service Requested

**AM Program:  
Using Excel  
2007/2010  
in a Law  
Practice**

**August 16  
Columbus**

**August 18  
Dayton**

**August 17  
Cleveland**

**PM Program:  
PowerPoint  
2007/2010  
for Legal  
Professionals**

- Unable to attend?

This CLE program is also available in this format:

**Book:** If you cannot attend these programs but want to order a copy of this course book, complete the registration form and check the book only check box.



## AM Program: Using Excel 2007/2010 in a Law Practice

## PM Program: PowerPoint 2007/2010 for Legal Professionals

Excel and PowerPoint can be invaluable tools for lawyers. Attend these seminars and learn how to make your life easier by putting these programs to use in your everyday practice.

**August 16  
Columbus**

AM Program  
**3.5** total  
CLE hours

**August 17  
Cleveland**

PM Program  
**3.5** total  
CLE hours



Ohio State Bar Association

**8:00 Registration**

**8:30 Excel Basics**

- Excel fundamentals and terms
- Workbooks: creating, saving, closing and modifying
- Law firm document management: creating folders and naming conventions for files
- Navigation and moving techniques
- Where to get free help if you are having trouble

**8:45 Entering Data**

- Editing cells
- Using formulas
- Copying and replicating formulas
- Order of operations: how formulas process

**9:15 Legal Applications: Exercises**

- Creating a probate inventory and appraisal with self-calculating recapitulations of tangible, intangible and real property
- Creating medical bill summaries with running totals
- Creating real estate settlement statements with auto-calculating subtotals and totals
- Calculating loan payments based on varying loan amounts, interest rates, terms and number of payments per year
- Calculating due dates and docketing schedules (probate estate used as an example)

**10:30 Break**

**10:45 Formatting Workbooks for Presentation to Clients or Insertion into Legal Documents**

- Selecting cells to be formatted
- Applying formatting to cells
- Adjusting the height of rows and width of columns
- Adding printing gridlines
- Centering across a selection
- Shading, boxes and borders

**11:00 Headers, Footers and Printing**

- Headers and footers
- Printing options
- Gridlines
- Row and/or column headings
- Row and/or column labels (titles)
- Fitting text on a page when printing
- Scaling to fit

**11:30 Charting Data**

- Creating and customizing bar graphs
- Creating and customizing pie charts

**11:45 Using Excel as a Data Source for Mail Merges in Word**

- Producing labels, envelopes or letters to clients
- Automating client communications

**12:15 Program Concludes**

**12:45 Registration**

**1:15 Introductory Examples of Legal Presentations Using PowerPoint**

**1:30 PowerPoint Nuts and Bolts**

**Project 1:** Opening Statement Example: Creating a Template for Presentation of Opening Statement

**Project 2:** Photographs and Clip Art: How Best to Create a Slide to Show Photographic Exhibits; Adding Clip Art to Enhance

**Project 3:** Evidentiary Considerations; Fixing Photographs for the Courtroom without Altering or Spoiling Evidence in Accordance with the Rules of Evidence

**3:00 Break**

**3:15 Project 4:** Documentary Evidence Slides: Inserting Exhibits That Are Documents and Calling Out Key Excerpts

**Project 5:** Flow Chart: Creating a Flow Chart to Explain Benefits of Estate Planning to Clients

**Project 6:** Timelines: Creating an Animated Timeline for Litigation

**Project 7:** Deposition Video and Media Clips: Creating Slides That Play Video Clips from Videotaped Deposition Testimony; 911 Emergency Recordings: Creating Slides That Play 911 Recordings for Playback in Litigation

**Project 8:** Do's and Don'ts for Using PowerPoint in the Courtroom and/or Other Presentations

**5:00 Program Concludes**

**Dates and Locations**

**August 16, 2011 Columbus**

Ohio State Bar Association, 1700 Lake Shore Dr., 43204

**August 17, 2011 Cleveland**

The Ritz-Carlton, 1515 W. 3rd St., 44113

**August 18, 2011 Dayton**

Sinclair Conference Center, 444 W. 3rd St., Building 12, 45402

**To Register**

**Mail:** OSBA CLE, P.O. Box 16562, Columbus, OH 43216-6562  
**Phone:** (800) 232-7124 or (614) 487-8585  
**Fax:** (614) 487-8808  
**Online:** www.ohioabar.org  
**Door:** Call in advance to confirm date, time, location and space availability. If you require special accommodations, please call OSBA member services at (800) 232-7124. Payment must accompany registration.

**To Save**

**Group Discount:** Three or more from the same firm or office registering for this program receive \$25 off each registration. (Registrations must be submitted at the same time.)  
**Membership:** OSBA members save an average of 25 percent on CLE. If you are a nonmember, join at www.ohioabar.org/join and start saving today!

Cancellation policy: Cancellations received by 5 p.m. the business day prior to the program will be refunded less a \$25 office fee. Those not attending will receive the course materials in full consideration of tuition paid.

OHIO ATTORNEY NUMBER \_\_\_\_\_ ADMISSION DATE \_\_\_\_\_

NAME \_\_\_\_\_

FIRM \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

PHONE \_\_\_\_\_ FAX \_\_\_\_\_

E-MAIL \_\_\_\_\_  NEW ADDRESS

<b>August 16</b> <input type="checkbox"/> Columbus	<b>August 17</b> <input type="checkbox"/> Cleveland	<b>August 18</b> <input type="checkbox"/> Dayton
<input type="checkbox"/> AM <input type="checkbox"/> PM <input type="checkbox"/> Both		
<b>Select Tuition</b>		
<b>One Program</b>		
	Member	Nonmember
<b>Pre-registration:</b>	<input type="checkbox"/> \$195	<input type="checkbox"/> \$244
<b>Walk-in registration:</b>	<input type="checkbox"/> \$220	<input type="checkbox"/> \$269
<b>Gov't attorneys:</b>	<input type="checkbox"/> \$166	<input type="checkbox"/> \$244
<b>OR Both Programs</b>		
	Member	Nonmember
<b>Pre-registration:</b>	<input type="checkbox"/> \$280	<input type="checkbox"/> \$350
<b>Walk-in registration:</b>	<input type="checkbox"/> \$305	<input type="checkbox"/> \$375
<b>Gov't attorneys:</b>	<input type="checkbox"/> \$238	<input type="checkbox"/> \$350
<input type="checkbox"/> Group Discount		

**Not Attending? Order the Book** (includes both programs)

\$55 Book  
 (Payment includes 6.75 percent sales tax and \$5 shipping.)

**Payment Options** Total Amount: \$ \_\_\_\_\_

Check   or    Credit Card

MASTERCARD    VISA    AMEX

ACCT. # \_\_\_\_\_ EXP DATE \_\_\_\_\_

SIGNATURE \_\_\_\_\_