

COURSE SYLLABUS

PLGL 310: LAW OFFICE MANAGEMENT (3 semester hours)

Online Course

Live Lecture: Wednesdays, 7:20 –10:00 PM

Instructor: Professor Danny J. Wallis
Office Location: Ferguson Social Sciences room 152
Office Hours: Professor Wallis is available by email or phone M – F, during normal business hours. (If an email is sent after 5 pm on a Friday, I will respond the following Monday.)
Office Phone: (903) 886-5317
Email: danny.wallis@tamuc.edu

Required Text and Software

Cynthia Traian Donnes, M.A., Practical Law Office Management, 5th Edition, Cengage Learning
ISBN 978-0-357-76740-5

Students must join the National Society for Legal Technology (NSLT) by going to the website located at www.legaltechsociety.org and selecting Student. From the homepage, select the "Join Today!" button to go to the registration page. The membership fee is \$350 and may be paid using a credit card, debit card, or a PayPal account. Once you are registered, select the "eLearning Portal" tab that will appear on the homepage when signed in to the NSLT site. The eLearning Portal will ask you to register for access to the learning portal. There is not a separate cost for registration on the eLearning Portal. The second registration creates a user profile to track your progress through the certificate process. Detailed instructions are attached at the end of this syllabus. Your membership is valid for 1-year from the date of registration, and the membership fee includes the cost of earning your Legal Technology Certificate.

Course Description

This course focuses on skills paralegals will need in order to efficiently manage a law office. Students will also be introduced to law office management systems and procedures. This is a beginning course introducing computer hardware and software basics that apply to the legal environment. Students will learn Microsoft Office components including Teams, Word, Excel, OneNote, PowerPoint, and Outlook, and the Windows operating system as they are used in the day-to-day life of paralegals. Students will also explore legal specific software including TrialDirector, Clio, NetDocuments, Workshare, iManage, and Concordanc

Course Objectives

The objective of this course is to provide an overview of computer programs, skills, research tools and

software programs that is essential to being a successful paralegal and to instruct how everyday programs have specific uses in a law office and for paralegals.

Student Learning Outcomes for this course include:

- Demonstrate aptitude performing basic tasks and creating commonly used legal documents in Microsoft Word, Excel, Adobe Acrobat, and Workshare.
- Demonstrate ability to perform common tasks for opening up a new client matter in the billing/case management software program Clio.
- Demonstrate ability to perform common tasks for electronic communication through the use of Microsoft Outlook, including the importance of email security and calendar management.
- Explain the basics of e-discovery, including basic terminology, and how to perform common tasks using e-discovery software program Concordance.
- Understand the basics of trial presentation software Microsoft PowerPoint, and TrialDirector, and how each can be used at trial.
- Students will gain familiarity with existing forms of legal technology. Students will be exposed to new technology emerging on the market and its role in changing the legal industry as a whole.
- Students will acquire hands-on experience with over a dozen legal technology tools through the use of software simulations and training tutorials.
- Students will gain insight into the legal technology market and the many software tools utilized by law firms of all sizes and practice areas.
- Create and edit word processing documents that are unique to the legal environment, including the use of templates, macros, creation of table of contents and table of authorities.
- Create and edit spreadsheets that are unique to the legal environment using multiple data types and Excel functions.
- Draft and manage professional correspondence through email software programs.
- Coordinate Calendar meetings and events with multiple attendees.
- Demonstrate an understanding of electronic discovery software and procedures.
- Learn and understand the proper method and procedures involved in document collaboration while ensuring all security and encryption protocols are followed.
- Organize for timely completion of all assignments, exercises and projects reflective of the time constraints imposed on all attorneys and paralegals working in a legal environment.

Attendance/Participation Policy

You are expected to know how to navigate and use the D2L platform by utilizing the trainings made available to you by the University. Additionally, you are expected to navigate, and use ZOOM to participate in live lectures and/or review recorded live lectures. You are expected to attend and participate in the online live lectures each week.

In addition, you are required to participate in the discussion each week you have assigned readings. You must prepare for the discussion by reading ALL the material assigned. Questions may be posted related to each topic the week readings are assigned. You must thoughtfully respond to any posted questions. Short posts unsupported by information in the readings may be given ZERO points.

Grading Policy

Lectures and Discussion: This class will be taught using the Socratic Method as well as lecture. You may be called on at any time and are expected to be fully prepared to discuss the assigned reading material during the live lectures and in the online discussions. This is a cumulative grade over the course of the semester.

Assignments: You are also responsible for completing the assignments listed in this syllabus. The assignments may be found within the chapters of the textbook and in handouts I may provide to you. All assignments must have a cover page indicating the following: your name, class, chapter, and name of the assignment (as it appears in the syllabus), and date the assignment is due. A deduction of 10 points will be assessed to all assignments turned in without a cover page. You will submit your assignments in the dropbox provided to you in the D2L platform.

All written work will be graded not only on content, but also on writing style, including punctuation and grammar.

Late work: You are expected to submit assignments on time. Written work turned in late will receive a deduction of 10 points for each day it is late. Exceptions will be granted only under the most extreme, verifiable circumstances after receiving approval from the Instructor.

Exams: The examinations will primarily consist of multiple choice, true/false, definition, and short answer questions. If an exam is take-home, any collaboration with other students with regards to the substance of the exam will result in a failing grade.

Your grade will be calculated according to the following formula:

50% NSLT Module Completion
10% NSLT Legal Technology Certificate
10% Attendance & Participation
15% Midterm Exam
15% Final Exam

Grade Distribution is as follows:

A = 90-99

B = 80-89

C = 70-79

D = 65-69

F = 64 and below

(No extra credit work will be allowed unless assigned as a bonus to the entire class.)

Technology Requirements LMS

All course sections offered by Texas A&M University-Commerce have a corresponding course shell in the myLeo Online Learning Management System (LMS). Below are technical requirements

LMS Requirements:

<https://community.brightspace.com/s/article/Brightspace-Platform-Requirements>

LMS Browser Support:

https://documentation.brightspace.com/EN/brightspace/requirements/all/browser_support.htm

YouSeeU Virtual Classroom Requirements:

<https://support.youseeu.com/hc/en-us/articles/115007031107-Basic-System-Requirements>

Access and Navigation

You will need your campus-wide ID (CWID) and password to log into the course. If you do not know your CWID or have forgotten your password, contact the Center for IT Excellence (CITE) at 903.468.6000 or helpdesk@tamuc.edu.

Note: Personal computer and internet connection problems do not excuse the requirement to complete all course work in a timely and satisfactory manner. Each student needs to have a backup method to deal with these inevitable problems. These methods might include the availability of a backup PC at home or work, the temporary use of a computer at a friend's home, the local library, office service companies, Starbucks, a TAMUC campus open computer lab, etc.

Communication

If you have any questions or are having difficulties with the course material, please contact your Instructor.

Technical Support

If you are having technical difficulty with any part of Brightspace (D2L), please contact Brightspace Technical Support at 1-877-325-7778. Other support options can be found here:

<https://community.brightspace.com/support/s/contactsupport>

Classroom Etiquette

All students enrolled at the University shall follow the tenets of common decency and acceptable behavior conducive to a positive learning environment. (See Student's Guide Handbook, Policies and Procedures, Conduct) You are expected to exhibit respect for the instructor and fellow students at all times. Failure to adhere to these policies may result in removal from the online course.

Please be respectful of others' opinions even if you do not agree with them. I look forward to reading a variety of thoughts and opinions and I want you to express yourselves, but please be respectful! Remember all caps means you are yelling.

Disability Statement

The Americans with Disabilities Act (ADA) is a federal anti-discrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodation of their disabilities. If you have a disability requiring accommodation, please contact:

Office of Student Disability Resources and Services
Texas A&M University – Commerce
Gee Library
Room 132
Phone: (903)886-5150 or (903)886-5835
Fax: (903)468-8148
StudentDisabilityServices@tamuc-commerce.edu

Nondiscrimination Statement

Texas A&M University - Commerce will comply in the classroom, and in online courses, with all federal and state laws prohibiting discrimination and related retaliation on the basis of race, color, religion, sex, national origin, disability, age, genetic information or veteran status. Further, an environment free from discrimination on the basis of sexual orientation, gender identity, or gender expression will be maintained.

COVID-19 Statement

Texas A&M-Commerce recommends the use of face-coverings in all instructional and research classrooms/laboratories.

Campus Carry Statement

Texas Senate Bill-11 (Government Code 411.2031, et al.) authorizes the carrying of a concealed handgun in Texas A&M University-Commerce buildings only by persons who have been issued and are in possession of a Texas License to Carry a Handgun. Qualified law enforcement officers or those who are otherwise authorized to carry a concealed handgun in the State of Texas are also permitted to do so. Pursuant to Penal Code (PC) 46.035 and A&M-0Commerce Rule 34.06.02R1, license holders may not carry a concealed handgun in restricted locations. For a list of locations, please refer to

<http://www.tamuc.edu/aboutUs/policiesProceduresStandardsStatements/rulesProcedures/34SafetyOfEmployeesAndStudents/34.06.02R1.pdf> (and/or consult your event organizer). Pursuant to PC 46.035, the open carrying of handguns is prohibited on all A&M-Commerce campuses. Report violations to the University Police Department at 903-886-5868 or 9-1-1.

Plagiarism Statement

“What is Plagiarism?”

Many people think of plagiarism as copying another's work, or borrowing someone else's original ideas. But terms like "copying" and "borrowing" can disguise the seriousness of the offense:

According to the Merriam-Webster Online Dictionary, to "plagiarize" means

1. to steal and pass off (the ideas or words of another) as one's own
2. to use (another's production) without crediting the source
3. to commit literary theft
4. to present as new and original an idea or product derived from an existing source.

In other words, plagiarism is an act of fraud. It involves both stealing someone else's work and lying about it afterward.

But can words and ideas really be stolen?

According to U.S. law, the answer is yes. The expression of original ideas is considered intellectual property, and is protected by copyright laws, just like original inventions. Almost all forms of expression fall under copyright protection as long as they are recorded in some way (such as a book or a computer file).

All of the following are considered plagiarism:

- turning in someone else's work as your own
- copying words or ideas from someone else without giving credit
- failing to put a quotation in quotation marks
- giving incorrect information about the source of a quotation
- changing words but copying the sentence structure of a source without giving credit
- copying so many words or ideas from a source that it makes up the majority of your work, whether you give credit or not (see our section on "fair use" rules)

Most cases of plagiarism can be avoided, however, by citing sources. Simply acknowledging that certain material has been borrowed, and providing your audience with the information necessary to find that source, is usually enough to prevent plagiarism. If you have retained the essential idea of an original source, and have not cited it, then no matter how drastically you may have altered its context or presentation, you have still plagiarized.” (www.plagiarism.org)

If you plagiarize, you will receive a ZERO for the assignment in question. I also reserve the right to give you an F in the course. The matter will be referred to the Office of the Dean of the College of Humanities Social Science and Arts and the Office of the Provost.

As Instructor, I reserve the right to amend, modify, or alter this syllabus as the situation may require.

Tentative Course Readings, Assignments and Testing Dates

**** The Chapters listed for each week are to be read before class that day, the Assignments, however, are assigned at the end of that class where they are found on the syllabus and are due at the beginning of class the following week****

8.27.25 Course, student, and instructor introductions. Review syllabus.
Register for NSLT website and learning portal.
Complete Microsoft Teams NSLT Learning Path.
Complete Outlook 2019 NSLT Learning Path.

9.3.25 Chapter 1 – The Legal Team, Law Practices, and Law Firm Governance
Complete Word 2019 (50% Completion) NSLT Learning Path.

9.10.25 Chapter 2 – Legal Administration and Technology
Complete Word 2019 (100% Completion) NSLT Learning Path.

9.17.25 Chapter 3 – Ethics and Malpractice
Complete Litera Workshare NSLT Learning Path.
Complete Excel 2019 NSLT Learning Path.

9.24.25 Chapter 4 – Client Relations and Communication Skills
Complete iManage NSLT Learning Path.

10.1.25 Chapter 5 – Legal Fees Timekeeping, and Billing
Complete Adobe Acrobat Pro DC NSLT Learning Path.

10.8.25 Midterm Examination- No Live Class

10.8.25 Chapter 6 – Client Trust Funds and Law Office Accounting
Complete OneNote for Office 365 NSLT Learning Path.

10.15.25 Business Letters, Mail Outs, and a General Guide to Written Correspondence
Complete Clio NSLT Learning Path.
Complete NetDocuments & Office NSLT Learning Path.

10.22.25 Chapter 7 – Calendaring, Docket Control, and Case Management
Complete PowerPoint NSLT Learning Path.

11.5.25 Chapter 8 – Legal Marketing
Complete CloudNine Concordance NSLT Learning Path.

11.12.25 Chapter 8 – Legal Marketing Continued
Complete CloudNine Concordance NSLT Learning Path.

11.19.25 Chapter 9 – File and Law Library Management

Complete TrialDirector NSLT Learning Path.

Complete, request, and submit NSLT Legal Technology Certificate

12.3.25 Chapter 9 – File and Law Library Management Continued

Complete TrialDirector NSLT Learning Path.

Complete, request, and submit NSLT Legal Technology Certificate

12.10.25 Final Exam- No live class