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Project Documentation: Excel-Based Legal Ops Dashboard

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Project Title:

Excel-Based Legal Operations Dashboard (Academic Simulation)

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Objective:

To design and implement a simulation of a legal task management system using Microsoft Excel

with features like SLA tracking, status updates, and reporting for litigation-related workflows.

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Project Description:

This project aims to replicate the core functionalities of a real-world legal operations dashboard.

The system allows users to enter, monitor, and analyze tasks using structured tables, formulas,

conditional formatting, and optional Python-based validation.

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Key Features:

1. Task Entry Table with columns:

- Task ID

- Client Name

- Task Type

- Assigned To

- Start Date

- Due Date

- Status

- Priority

- Completion %

2. Automated Calculations and SLA Compliance:

- Remaining days calculation using Excel formulas

- SLA breach flagging if task duration exceeds the limit

- Conditional formatting to highlight overdue and completed tasks

3. Dashboard Summary (Optional Enhancement):

- Total tasks, In-progress, Completed

- Bar and Pie Charts (can be added in Excel or Power BI)

4. Python Automation Script (Optional):

- Python file `sla\_rules.py` to analyze SLA breaches and export flagged tasks

- Requires: pandas, openpyxl

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How to Use:

1. Open the Excel file `Legal\_Ops\_Dashboard.xlsx`

2. Enter new tasks into the table

3. Excel will automatically calculate days remaining and SLA status

4. Use filters or sort features to manage and view task statuses

5. (Optional) Run the Python script for bulk SLA analysis

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Customization:

- Change SLA rule (e.g., 3 days) in the formula or Python variable

- Add new columns like department, severity, etc.

- Visual dashboards can be integrated for reporting

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Conclusion:

This academic project simulates real-time legal task workflows in a lightweight, user-friendly format.

It is suitable for portfolio display, internship support tasks, or entry-level legal tech environments.

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