



MICROSOFT EXCEL

for LEGAL PROFESSIONALS

Covering Excel for Windows Versions
2010, 2013, 2016, 2019 and Office 365



MICROSOFT EXCEL

FOR LEGAL PROFESSIONALS

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Mac users: If you are using this manual with Excel for Mac, some of the steps will be different. Further, some features available in Excel for Windows are not available in Excel for Mac.

The materials in this book were written using Microsoft Office 365 and all steps and instructions were tested prior to the publication date. As Microsoft continuously updates Office 365, your software experience may vary slightly from what is seen in this manual.

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MEET OUR TEAM OF EXCEL EXPERTS

Meet our team of Excel experts who have co-authored this manual.



BARRON HENLEY

Barron is an attorney who has over 20 years of experience in legal technology. After earning his B.S./B.A. (marketing and economics) and J.D. from The Ohio State University, Barron discovered his passion for helping lawyers fix problems within their practice. Today, Barron partners with our clients to make law firms and legal departments more efficient. Barron's breadth of knowledge enables him to dive into the details of a firm's operations. He is often the lead on Comprehensive Practice Analysis projects for clients that examine all aspects of making a firm more successful: technology, organizational design, process optimization and financial practices.

JOHN FEDERICO

John's specialty is "making technology do cool things it wasn't necessarily intended to do." Having practiced as an attorney, John understands the rigors of practicing law, but he also empathizes with the demands placed on a legal professional's time. With this in mind, he saves time for his clients by leveraging document automation technologies like HotDocs and Microsoft Word, to drastically accelerate the drafting, reviewing, and editing of legal documents.



JEFFREY SCHOENBERGER

Jeff is our resident Apple guru. After practicing law as an Equal Justice Works / AmeriCorps Legal Fellow for the Legal Aid Society of Southwest Ohio, Jeff joined Affinity, and brought his unique ability to discover faster and better ways for clients to do everyday tasks to our team. Because Jeff understands the worlds of both PC and Mac users, clients using any type of system can count on him to help with desktop office software and document assembly needs regardless, of the type of computer an office has. Jeff is also well versed in Apple's iOS, so he can aid clients in making the most of their tablets and mobile devices.



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DANIELLE DAVISROE

After working as an attorney in domestic relations for several years, Danielle found her way to Affinity and to this day she is always on the lookout for better ways to do things. She carries new strategies she finds with her as she works with the clients her team supports. Danielle has a Bachelor of Science in Business Administration from The Ohio State University Fisher College of Business and a Juris Doctorate from The Ohio State University Moritz College of Law.



ADAM RINGEL

With four years' experience as a personal injury attorney, Adam is a valuable member of our document automation team. In addition to his skill in helping make legal drafting more efficient through technologies like HotDocs and Microsoft Word, Adam provides training on the Microsoft Office Suite and builds custom data queries for our clients. With the highly collaborative nature of the document automation team based in Columbus, Adam is constantly invigorated by his colleagues. The group consistently helps one another find new insights and perspectives along the path of finding the solutions our clients need.

CYARA HOTOPP

After graduating cum laude with a Bachelor of Arts in Philosophy from The Ohio State University and a Juris Doctorate from The Ohio State University Moritz College of Law, Cyara knew she wanted to use her education to solve problems for legal professionals. She is also currently working on getting an MS in Information Assurance. Cyara works with law firms and legal departments to help streamline the drafting of complex documents. Her technological understanding coupled with her background in law means she doesn't just make a document work properly, but she also advises on truly improving the document from a best practices perspective.



MICROSOFT EXCEL FOR LEGAL PROFESSIONALS

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7 LAW FIRM APPLICATIONS OF EXCEL

EXERCISE 10 - COLUMN AND ROW TOTALS

Add the rows to the left of column C and the columns above row 8.

	A	B	C
1	COLUMN AND ROW TOTALS		
2			
3	\$ 1,242.33	\$ 1,232.00	
4	\$ 5,312.00	\$ 757.00	
5	\$ 8,456.00	\$ 4,232.33	
6	\$ 3,532.53	\$ 123.22	
7	\$ 523.44	\$ 677.99	
8			

FIGURE 7-1

Create a formula in cell C3 that adds cells A3 and B3

1. Click in cell C3
2. Type the entire formula "`=A3+B3`" in the cell
3. Press Enter

Copy the formula in cell C3 down to cells C4 through C7

- Click in cell C3
- Click the copy button on the toolbar, OR Home ribbon → Copy OR press Ctrl + C.
- Select cells C4 through C8.
- Press Enter.

Create a formula in cell A8 that adds cells A3 through A7

- Position the cell pointer on cell A8.
- Press the AutoSum button on the toolbar
- Press Enter.

Copy the formula in cell A8 to cells A9 and A10

- Position the cell pointer on cell A8.
- Click the copy button on the toolbar, OR go to the Edit menu and down to Copy OR press Ctrl+C.
- Press the → key once.
- Hold down on Shift and press the → key once more.

- Press Enter.

Trick for copying formulas quickly: You can accomplish the foregoing task easily by using the **fill handle**. The fill handle is the small square dot at the bottom right hand corner of the cell. If you hover your cursor above the dot, the arrow will switch to a black cross. Hold down on the mouse and drag the fill handle down the column of cells. When you release the mouse, the formulas will fill in.

	A	B	C
1	COLUMN AND ROW TOTALS		
2			
3	\$ 1,242.33	\$ 1,232.00	\$ 2,474.33
4	\$ 5,312.00	\$ 757.00	
5	\$ 8,456.00	\$ 4,232.33	
6	\$ 3,532.53	\$ 123.22	
7	\$ 523.44	\$ 677.99	
8			

FIGURE 7-2

You can also use speed keys for this task. To fill in the active cell with the contents of the cell above it (fill downward), press Ctrl+D. To fill in with contents of the cell to the left (fill to the right), press Ctrl+R.

EXERCISE 11 - RELATIVE CELL REFERENCES

As you saw previously, if you copy a formula from one row into rows below it, the cell references will automatically shift with the formula. However, sometimes, you don't want the cell references to shift. For example, if you copy the formula in cell B5 (=A5*C3), the formula will change to =A6*C4. A6 is the cell you want to multiply by 10%, but since the cell reference shifted to C4 instead of C3, the formula no longer works. So the problem we're solving here is that we want the reference to cell C3 to stick but allow the reference to the cell in column A to shift.

	A	B	C
1	RELATIVE CELL REFERENCES		
2			
3			10%
4	Beginning Number	Percentage	
5	711		
6	891		
7	993		
8	1142		
9	1394		

FIGURE 7-3



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