



Affinity
INSIGHT

MICROSOFT EXCEL

for LEGAL PROFESSIONALS

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



MICROSOFT EXCEL

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

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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 365 and all steps and instructions were tested prior to the publication date. As Microsoft continuously updates Microsoft 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

Most people wouldn't relish the idea of spending a day in a conference room, teaching core production tools. Barron is not most people. There are few things Barron enjoys more than teaching all-day software classes.

As an attorney, he understands how challenging it is to practice law without the proper training on the technology tools. When Barron isn't training people, he focuses on automating documents and teaching CLE classes for attorneys across North America.

JOHN FEDERICO

With a drive to make software bend to his will, John pushes the limits of what Excel can do with complex formulas and macros. His experience practicing law taught him the value of analyzing data efficiently.

When John isn't working in Excel, he focuses on automating complex documents with document automation software. He's passionate about creating a simple user interface, reducing the amount of data entry required to generate complex documents. Never one to back down from a challenge, John will find a way to make anything happen.



DANIELLE DAVISROE

As an Excel junkie, Danielle loves to simplify complex workbooks and simplify the user experience. Between naming cells and employing the power of conditional formatting, Danielle has more than a few tricks up her sleeve.

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.



HOW TO USE THIS MANUAL

Navigation

Use Ctrl + F to search this manual for content.

The table of contents is clickable - click on any line in the table of contents to be taken directly to that chapter/sub-chapter.

New to Excel?

Start with the Introduction, Interface, and Excel Basics chapters to acquaint yourself with Excel. These explain how and why you need to use Excel and how to navigate through the interface.

Familiarize Yourself with Excel's Features

We recommend that you skim through the rest of the manual to familiarize yourself with the features most commonly used by legal professionals. Once you are aware of what Excel can do, you can use this manual to guide you every step of the way.

Follow Along

The rest of the manual walks you through specific applications of Excel using step-by-step instructions and screenshots. Recreate our data in your own workbook or apply the steps directly to your own data.

Future Reference

Hold onto a (digital) copy of this manual for future reference. Whenever you get stuck, you can refer it the instructions at any time.

MICROSOFT EXCEL FOR LEGAL PROFESSIONALS

TABLE OF CONTENTS

1 INTRODUCTION

How Legal Professionals Can Use Excel.....	1
Why Legal Professionals Need to Learn Excel	1
Terms Used Herein.....	1
Current File Types	5

2 INTERFACE

Terminology.....	7
File Menu/Backstage View	8
Quick Access Toolbar	8
Tabs.....	9
Contextual Tabs	9
Ribbon.....	10
Ribbon Controls	10

3 EXCEL BASICS

What is a Workbook?.....	11
Navigating Worksheets	12
File Operations	13
Creating New Folders & Renaming Files	13
Renaming Files or Folders	13
Getting Help	14

4 ENTERING DATA

Best Practices	15
Entering Data.....	15
Data Classification.....	15
Editing Cells	16

5 INTRODUCTION TO FORMULAS

What is a Formula?.....	17
Function Arguments Dialog.....	17

Order of Operations - How Excel Processes Formulas.....	20
---	----

6 AUTOFILL AND THE FILL HANDLE

Fill Handle.....	21
Built-In AutoFill Examples	21
Custom AutoFill Lists.....	22
AutoFilling Formulas	23

7 CELL REFERENCES

Read Ins.....	24
Absolute Cell References.....	25

8 CELL NAMES

Renaming Cells	27
Naming Ranges.....	29
Using Cell Names.....	29
Managing Cell Names	30

9 BRINGING EXCEL TABLES INTO WORD

Simple Word Table.....	32
Insert Worksheet Object	32
Link To Source Workbook.....	33

10 REVIEWING AND PROTECTING WORKSHEETS

Comments.....	35
Track Changes.....	37
Protecting Cells In A Worksheet	38

11 CALCULATING TOTALS

Column and Row Totals.....	40
Sub Totals	41
Running Totals	43

12 FILTERING AND SORTING DATA

Filtering	44
Sorting.....	45

13 CALCULATING LOAN PAYMENTS**14 CALCULATING DATES**

Adding Days And Weeks.....	49
Adding Months.....	50

15 IF THIS, THEN THAT

IF Function.....	52
IFS (365)	53
SWITCH (365).....	54

16 NESTING FORMULAS

Using Multiple Cells	56
Using Nested Formulas	57
Nesting IF Functions.....	57

17 FORMATTING WORKBOOKS

Selecting Cells to be Formatted.....	60
Applying Formatting to Cells	61
Adjusting the Height of Rows and Width of Columns.....	61
Merging Cells.....	62
Conditional Formatting	62

18 HEADERS, FOOTERS, AND PRINTING

Page Layout View.....	64
Headers/Footers.....	64
Printing Gridlines.....	65
Printing Row and/or Column Headings.....	66
Repeating Row and/or Column Labels (Titles)	66
Fitting Text On A Page When Printing.....	67
Printing a Particular Section or Range	67

19 PRODUCING CHARTS AND GRAPHS

Why Would A Legal Professional Need Charts or Graphs?	68
Charting Data.....	68

20 EXCEL AS A MAIL MERGE DATA SOURCE

Client Communication Mail Merge.....	71
Formatting A Date Merge Field	72

21 MANIPULATING TEXT

Combine & Splitting Text.....	73
Change Case	76

22 LOOKING UP VALUES IN A LIST

VLOOKUP.....	78
XLOOKUP (365).....	79
Looking Up Data Across Workbooks	79

23 DATA VALIDATION

Add Data Validation	80
Dropdown Options	81
Dates	82
Numbers.....	84

24 TABLES

Advantages.....	85
Inserting tables.....	85
Automatic Header Rows	86
Automatic Total Rows	87
Automatic Expansion	87
Formula Replication.....	88
Table Styles.....	89
Sorting and Filtering.....	90
Removal of Duplicate Data.....	92
Structured Referencing	93

25 PIVOTTABLES

Creating PivotTables	95
Filtering PivotTables.....	96
Customizing Values	99

Subtotals and Grand Totals 101

Updating Data..... 103

Working With Dates..... 105

Appearance 107

PivotTable Examples 110

26 GOAL SEEK AND SCENARIO MANAGER

Goal Seek..... 112

Scenario Manager..... 113

27 OTHER MISCELLANEOUS TIPS & FORMULAS

Change the Default Fonts..... 115

Paste The Value, Not The Formula..... 116

Quick Analysis (2016/19/365) 116

11 CALCULATING TOTALS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

COLUMN AND ROW TOTALS

There are multiple ways to calculate column and row totals in Excel.

While you may be tempted to use the + symbol to add cells (ex: A2+B2+C2), if you are adding a range of cells, this is inefficient. Instead, use the SUM function.

Sum Function

The SUM function can be inserted by typing it, using in the **Insert Function button**, or on the **Formula ribbon** → **Math & Trig dropdown** → **SUM**.

The SUM function arguments are relatively simple. Enter the range of cells to total. You can enter more than one range.

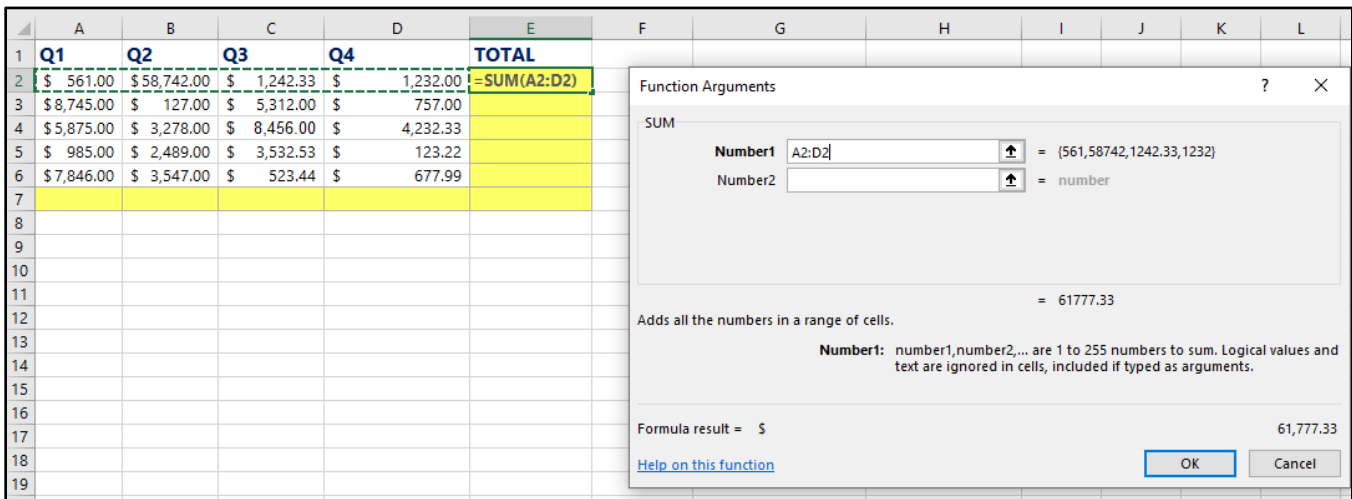


FIGURE 11-1

AutoSum

The AutoSum button will attempt to do the work for you.

1. Click in the cell where you want the total.
2. On the **Formulas ribbon**, click on the **AutoSum button**. (It is also available on the Home ribbon).

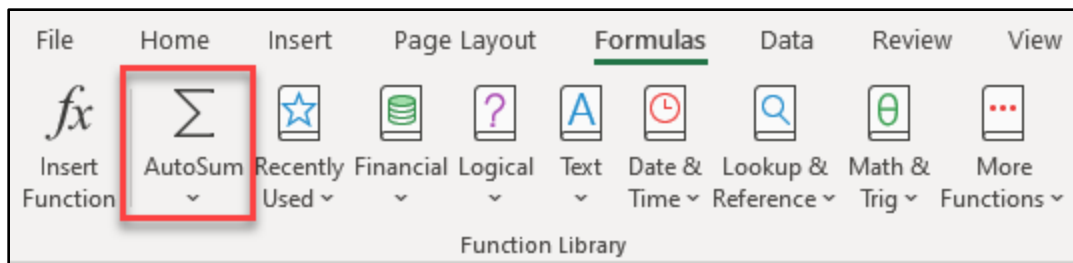


FIGURE 11-2

- Excel will try to determine what you want to total. It will tentatively select the range to total. If it does what you want, click **Enter**. If not, select a new range and click **Enter**.

SUB TOTALS

Sometimes you need to calculate a subtotal (a conditional sum). To create a conditional sum, you want to use the SUMIF function. It has three arguments. The first is the range of cells to be evaluated. The second is the criteria against which to evaluate those cells. The third is the range of cells to sum (this argument is optional - you do not need it if you are summing the same cells as the ones being evaluated).

In the example below, we need to calculate the subtotal for each type of property. The range to be evaluated is the B2:B10 - the cells that list the property type. The range to be summed is C2:C10 - the cells with the value in them.

	A	B	C
1	Description	Type	Value
2	1 lot of miscellaneous personal property	tangible	\$ 1,000.00
3	100 shares Limited, Inc., cert. #NY147323 CUSIP #532716 10 7	intangible	\$ 1,700.00
4	80 shares HoloVision Systems, Inc.	intangible	\$ 2,560.00
5	Certain real estate situated in the City of Columbus, County of Franklin and more particularly described in Exhibit A attached hereto. Property also known as 4373 Cole Avenue, Columbus, Ohio 43214. Parcel No. 010-4123430	real estate	\$ 91,500.00
6	Coin Collection-assorted coins	intangible	\$ 20.00
7	Huntington National Bank checking account #0439-2548-532	intangible	\$ 19,068.65
8	State Savings Bank Certificate of Deposit #02-57612098	intangible	\$ 11,358.20
9	State Savings Bank Market Access Account #02-62100557	intangible	\$ 32,652.54
10	U. S. Currency	intangible	\$ 84.00
11	GRAND TOTAL		\$ 159,943.39
12			
13	RECAPITULATION		
14	Tangible Property		
15	Intangible Property		
16	Real Estate		
17			

FIGURE 11-3

- Position the cell point in the cell you want to have the subtotal in: C13.
- Click the **Insert Function** button or **Formula ribbon**.

3. Click on the **Math & Trig category**, then scroll down the list of corresponding functions and click on **SUMIF**. As you can see, SUMIF adds the cells specified by a given condition or criteria.
4. If using the Insert Function button, click **OK**.
5. Click in the **Range box** and then select cells the cells to evaluate: B2:B10.
6. In the **Criteria box**, enter the text "tangible" (including the quotation marks - 2019/365 will add them for you).
7. In the **Sum_range box**, select cells to be summed: C2:C10.
8. Click **OK**.
9. Repeat this function with the appropriate changes for the other subtotals.

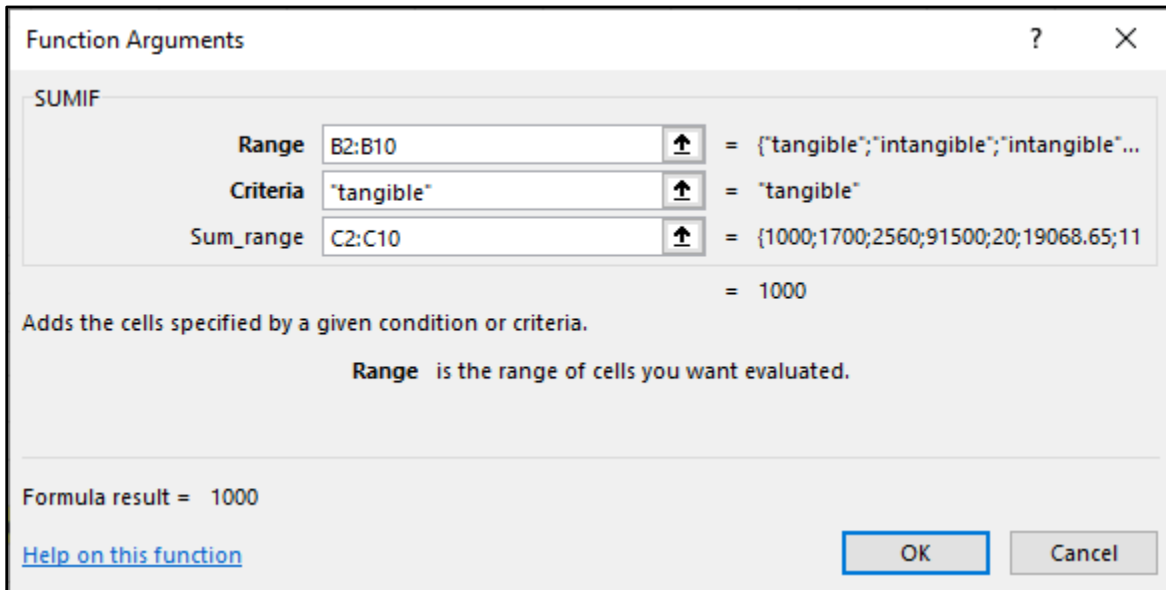


FIGURE 11-4

RUNNING TOTALS

To create a running total (such as the running total of medical expenses below), you need two formulas. First, you need to read in the initial amount. Then you need add the next amount to the previous total.

	A	B	C	D	E
1	RUNNING TOTALS & SORTING				
2					
3	Medical Bill Summary for John A. Doe				
4					
5	Service	Date of			Running
6	Provider	Service	Description	Amount	Total
7	Riverside Hospital	04/23/97	X-ray	\$ 542.00	
8	Riverside Hospital	04/23/97	Cast broken leg	\$ 831.99	
9	James Physical Therapy Clinic	06/30/97	Physical therapy treatment	\$ 250.00	
10	James Physical Therapy Clinic	07/28/97	Physical therapy treatment	\$ 767.00	
11	James Physical Therapy Clinic	08/30/97	Physical therapy treatment	\$ 250.00	
12	James Physical Therapy Clinic	09/27/97	Physical therapy treatment	\$ 250.00	
13	Dr. John Roberts	10/03/97	Follow up visit	\$ 325.50	

FIGURE 11-5

1. Click in cell for the first total: E7.
2. Read in the first amount: =D7.
3. Click in the cell for second total: E8.
4. Add the new amount to the prior total: =E7+D8.
5. Use the AutoFill handle to copy the formula down. (See Chapter 6.)



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