



---

# MICROSOFT EXCEL

## FOR LEGAL PROFESSIONALS

Covering Microsoft 365 for Windows

---

BY: BARRON HENLEY  
JOHN FEDERICO &  
DANIELLE DAVISROE

# MICROSOFT EXCEL

## FOR LEGAL PROFESSIONALS

### PERSONAL LICENSE

©2024 Affinity Consulting Group LLC

ALL RIGHTS RESERVED. No part of this work covered by the copyright herein may be reproduced or distributed in any form or by any means, except as permitted by U.S. copyright law, without the prior written permission of the copyright owner.

Microsoft and the Office logo are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. Affinity Consulting Group LLC is an independent entity from Microsoft Corporation and is not affiliated with Microsoft in any manner.

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.

For training or technology assistance, contact us at Affinity Consulting Group LLC - 614.602.5561 or [info@affinityconsulting.com](mailto:info@affinityconsulting.com). For permission to use materials from this text or product, submit all requests via email to [info@affinityconsulting.com](mailto:info@affinityconsulting.com).

This is for your personal use only, you may not distribute, modify, or copy the materials, except for archival or backup purposes, without express permission of the copyright owner.

Version 4.01



Lawyerist  
**LAB**®

# Ready to create the law firm of your dreams?

Our small firm-focused coaching program is here to guide you on your journey to a healthy firm. Lawyerist Lab is the place for innovative, modern, and entrepreneurial small law firm owners who want to explore better ways to do law.



## **Build a Solid Foundation**

Learn to remove roadblocks to build and streamline the strategy and systems that help your practice run smoothly.

## **Get Expert Guidance**

Our team of expert coaches are small business owners themselves, ready to help you eliminate uncertainty and indecision, and find freedom in your firm.

## **Be Part of the Community**

Join a robust and engaged community of like-minded small law firm owners and find the support and encouragement to help you thrive.

Visit [lawyerist.com/coaching](https://lawyerist.com/coaching) to learn more!



## 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 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.

# MICROSOFT EXCEL FOR LEGAL PROFESSIONALS

## TABLE OF CONTENTS

### CHAPTER 1 INTRODUCTION

How to Use This Manual .....	1
How Legal Professionals Use Excel.....	1
Why Legal Professionals Need to Learn Excel .....	2
Current File Types.....	2

### CHAPTER 2 INTERFACE

File Menu/Backstage View.....	3
Quick Access Toolbar.....	4
Tabs.....	4
Contextual Tabs.....	4
Ribbon .....	4
Ribbon Controls .....	5

### CHAPTER 3 EXCEL BASICS

What is a Workbook? .....	6
Navigating Cells .....	7
File Operations.....	7
Getting Help .....	8
Selecting Cells.....	8

### CHAPTER 4 ENTERING DATA

Best Practices.....	9
Entering Data .....	9
Data Classification .....	9
Editing Cells.....	10

### CHAPTER 5 FORMATTING WORKSHEETS

Applying Formatting to Cells .....	11
Formatting Numbers .....	11
Formatting Dates.....	14
Text Overflow .....	15
Alignment.....	18

Centering Text Across Multiple Columns..... 20

**CHAPTER 6 INTRODUCTION TO FORMULAS**

Definition..... 22  
 Functions..... 22  
 Order of Operations - How Excel Processes Formulas ..... 24

**CHAPTER 7 AUTOFILL AND THE FILL HANDLE**

Fill Handle ..... 26  
 Built-In AutoFill Examples..... 26  
 Custom AutoFill Lists..... 27  
 AutoFilling Formulas ..... 28

**CHAPTER 8 CELL REFERENCES**

Read Ins..... 30  
 Absolute Cell References ..... 31

**CHAPTER 9 CELL NAMES**

Renaming Cells ..... 33  
 Naming Ranges ..... 35  
 Using Cell Names..... 35  
 Managing Cell Names..... 36

**CHAPTER 10 COPYING INTO WORD**

Simple Word Table..... 38  
 Insert Worksheet Object ..... 38  
 Link To Source Workbook..... 40

**CHAPTER 11 REVIEWING AND PROTECTING CELLS**

Comments..... 41  
 Protecting Cells..... 43

**CHAPTER 12 CALCULATING TOTALS**

Column and Row Totals..... 44  
 Sub Totals..... 45  
 Running Totals..... 47

**CHAPTER 13 FILTERING AND SORTING**

Filtering ..... 48  
 Sorting..... 49

**CHAPTER 14 CALCULATING LOAN PAYMENTS**

**CHAPTER 15 CALCULATING DATES**

Adding Days and Weeks ..... 54  
 Adding Months..... 55

**CHAPTER 16 IF THIS, THEN THAT**

IF Function ..... 58  
 IFS..... 59  
 SWITCH..... 60

**CHAPTER 17 NESTING FORMULAS**

Using Multiple Cells ..... 62  
 Using Nested Formulas..... 63  
 Nesting IF Functions..... 63

**CHAPTER 18 CONDITIONAL FORMATTING**

Setting Up Conditional Formatting ..... 66  
 Example: Conditionally Shading Blank Cells..... 67  
 Managing Conditional Formatting..... 68

**CHAPTER 19 HEADERS, FOOTERS, AND PRINTING**

Page Layout View ..... 71  
 Headers/Footers..... 71  
 Printing Gridlines ..... 72  
 Printing Row and/or Column Headings..... 73  
 Repeating Row and/or Column Labels (Titles)..... 73  
 Fitting Text on a Page When Printing..... 74  
 Printing a Particular Section or Range..... 74

**CHAPTER 20 CHARTS AND GRAPHS**

Why Would a Legal Professional Need Charts or Graphs? ..... 75  
 Charting Data ..... 75



## CHAPTER 21 EXCEL AS A MAIL MERGE DATA SOURCE

Client Communication Mail Merge .....	78
Formatting A Date Merge Field.....	79

## CHAPTER 22 MANIPULATING TEXT

Combine & Splitting Text .....	81
Change Case .....	83

## CHAPTER 23 LOOKING UP VALUES IN A LIST

VLOOKUP.....	85
XLOOKUP.....	86
Looking Up Data Across Workbooks.....	86

## CHAPTER 24 DATA VALIDATION

Add Data Validation .....	88
Dropdown Options .....	89
Dates .....	90
Numbers.....	92

## CHAPTER 25 TABLES

Advantages.....	93
Inserting Tables.....	93
Automatic Header Rows .....	94
Automatic Total Rows.....	95
Automatic Expansion.....	95
Formula Replication.....	97
Table Styles.....	97
Sorting and Filtering .....	99
Removing Duplicate Data.....	101
Structured Referencing .....	102

## CHAPTER 26 PIVOTTABLES

Creating PivotTables.....	104
Filtering PivotTables.....	106
Customizing Values.....	109
Subtotals and Grand Totals .....	111

Updating Data.....	113
Working With Dates.....	115
Appearance.....	117
PivotTable Examples.....	120

## **CHAPTER 27 GOAL SEEK AND SCENARIO MANAGER**

Goal Seek.....	122
Scenario Manager.....	123

## **CHAPTER 28 OTHER MISCELLANEOUS TIPS & FORMULAS**

Change the Default Fonts.....	126
Paste The Value, Not The Formula.....	126
Quick Analysis.....	127

# CHAPTER 12

## CALCULATING TOTALS

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

### Column and Row Totals

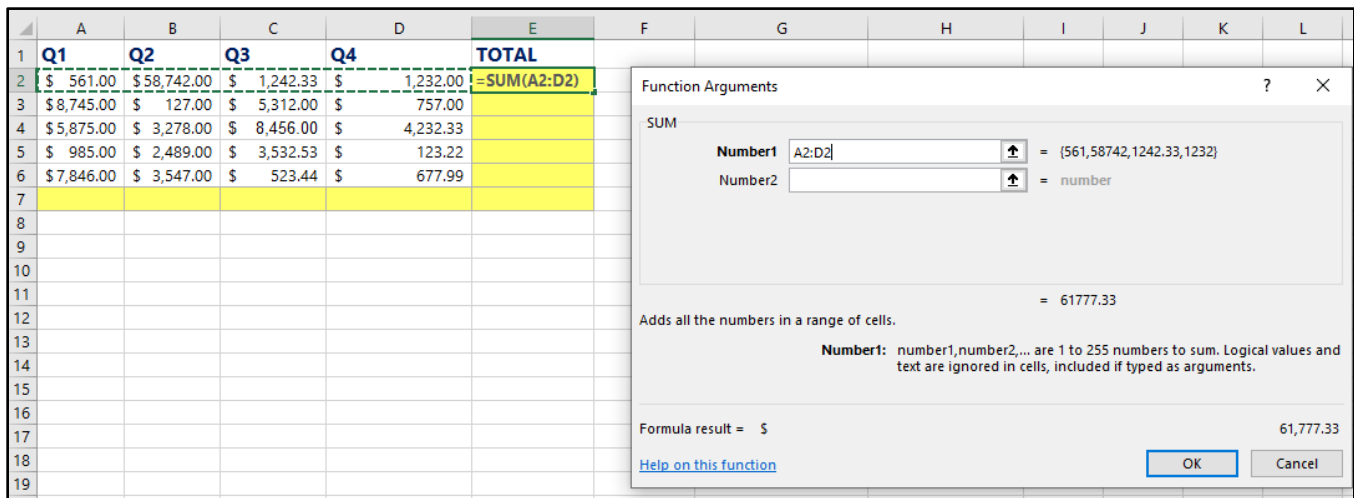
There are multiple ways to calculate column and row totals in Excel.

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.



	A	B	C	D	E	F	G	H	I	J	K	L
1	Q1	Q2	Q3	Q4	TOTAL							
2	\$ 561.00	\$ 58,742.00	\$ 1,242.33	\$ 1,232.00	=SUM(A2:D2)							
3	\$ 8,745.00	\$ 127.00	\$ 5,312.00	\$ 757.00								
4	\$ 5,875.00	\$ 3,278.00	\$ 8,456.00	\$ 4,232.33								
5	\$ 985.00	\$ 2,489.00	\$ 3,532.53	\$ 123.22								
6	\$ 7,846.00	\$ 3,547.00	\$ 523.44	\$ 677.99								
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18												
19												

FIGURE 12-1

### 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).

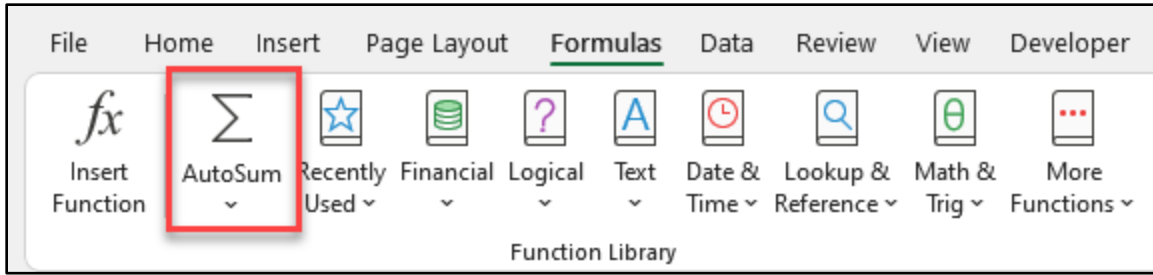


FIGURE 12-2

- 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	<b>Description</b>	<b>Type</b>	<b>Value</b>
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	<b>GRAND TOTAL</b>		<b>\$ 159,943.39</b>
12			
13	<b>RECAPITULATION</b>		
14	Tangible Property		
15	Intangible Property		
16	Real Estate		
17			

FIGURE 12-3

- Position the cell point in the cell you want to have the subtotal in: C13.

2. 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" (without the quotation marks -Excel 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.

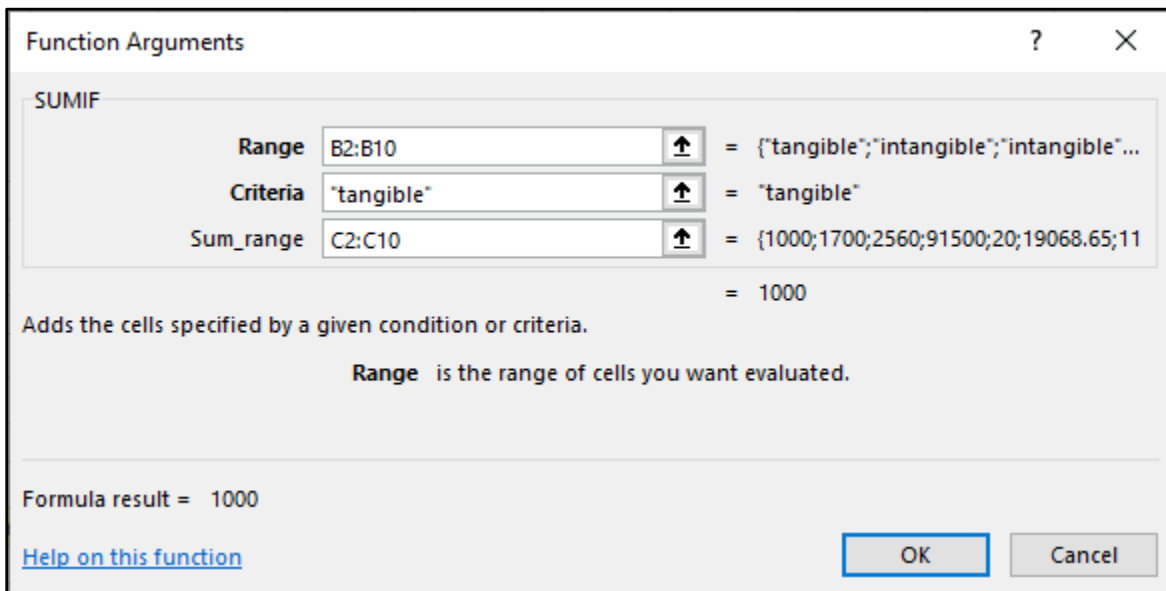


FIGURE 12-4

## 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	<b>RUNNING TOTALS &amp; SORTING</b>				
2					
3	<b>Medical Bill Summary for John A. Doe</b>				
4					
5	<b>Service</b>	<b>Date of</b>			<b>Running</b>
6	<b>Provider</b>	<b>Service</b>	<b>Description</b>	<b>Amount</b>	<b>Total</b>
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 12-5

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 **Fill handle** to copy the formula down. (See Chapter 7.)



Lawyerist  
**LAB**®

# Ready to create the law firm of your dreams?

Our small firm-focused coaching program is here to guide you on your journey to a healthy firm. Lawyerist Lab is the place for innovative, modern, and entrepreneurial small law firm owners who want to explore better ways to do law.



## **Build a Solid Foundation**

Learn to remove roadblocks to build and streamline the strategy and systems that help your practice run smoothly.

## **Get Expert Guidance**

Our team of expert coaches are small business owners themselves, ready to help you eliminate uncertainty and indecision, and find freedom in your firm.

## **Be Part of the Community**

Join a robust and engaged community of like-minded small law firm owners and find the support and encouragement to help you thrive.

Visit [lawyerist.com/coaching](https://lawyerist.com/coaching) to learn more!