Affinity CONSULTING

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 simply 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
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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.

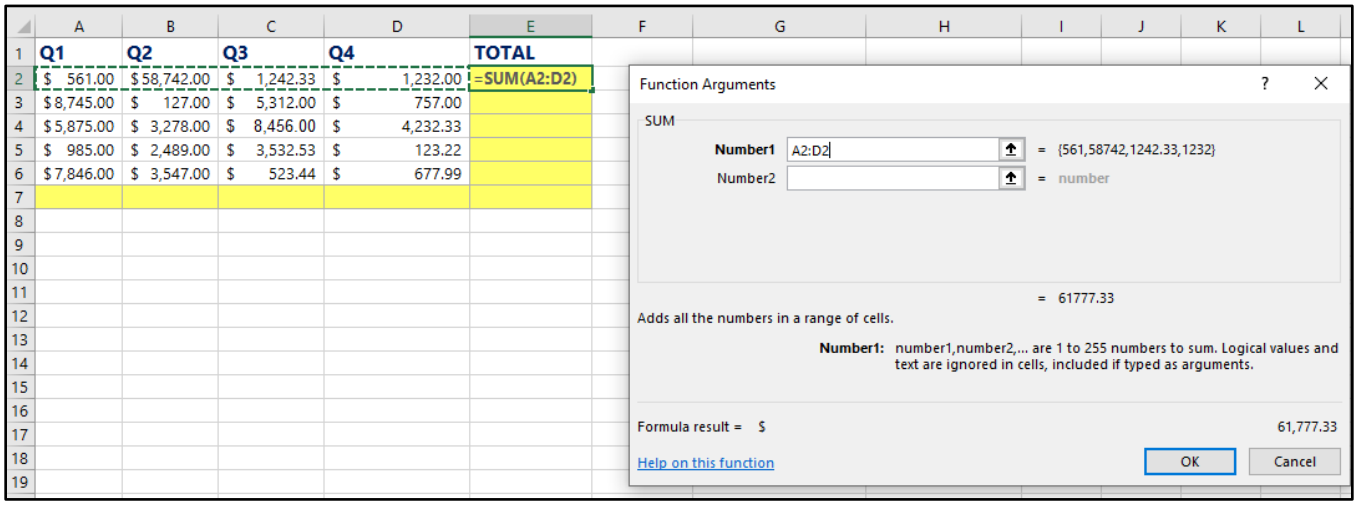

FIGURE 11-1

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).

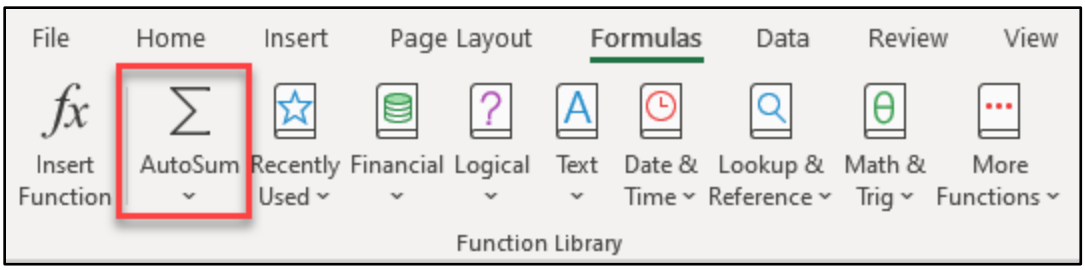

FIGURE 11-2

3. 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		

FIGURE 11-3

1. 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" (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.

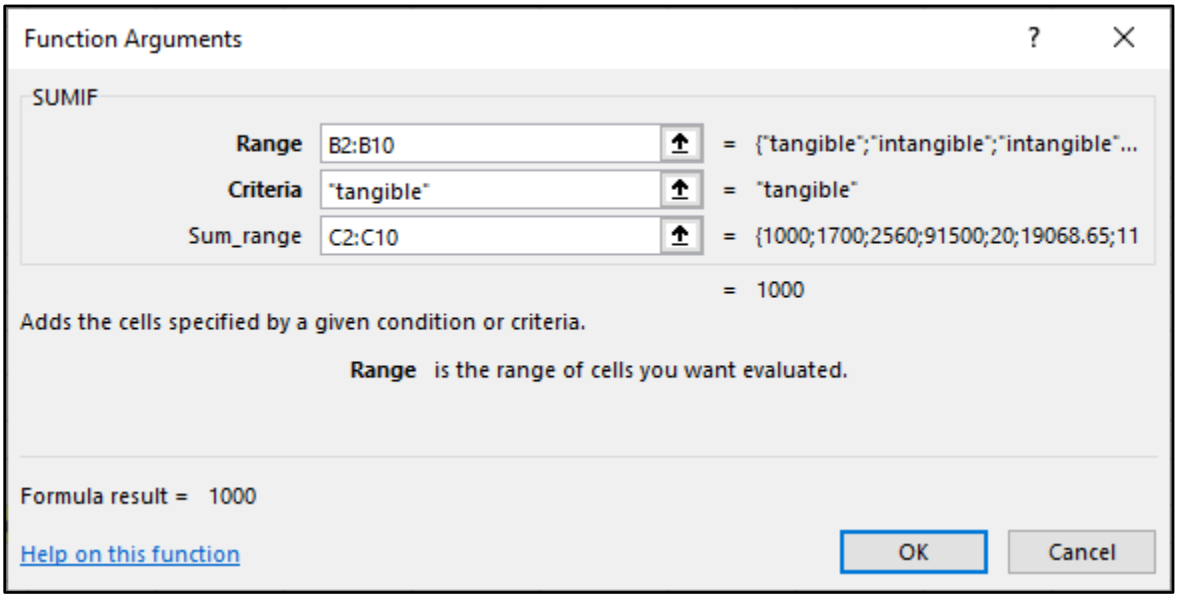

FIGURE 11-4

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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