

1 INTRODUCTION

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HOW LEGAL PROFESSIONALS CAN USE EXCEL

This manual focuses on the fundamentals and legal-specific applications of Microsoft Excel. Many legal professionals initially wonder how a spreadsheet program like Excel might be used in the practice of law. As you will see, Excel is a powerful and easy to use program for organizing and managing textual and numeric data. Excel also provides the user with the ability to perform an amazing array of calculations including financial, date & time, math & trigonometry, statistical, database, and logical calculations. Data is easily converted into charts and graphs and Excel is also an extraordinary tool for maintaining lists and creating tables.

WHY LEGAL PROFESSIONALS NEED TO LEARN EXCEL

The best bang for your technology dollar is to learn to use the technology you already own. Since Excel comes with Microsoft Office and most organizations already own it, Excel is a classic example of this. Upon completion of this course, you might wonder why you didn't start using Excel sooner.

TERMS USED HEREIN

Quick Access Toolbar

The Quick Access Toolbar ("QAT") is located at the top of the Excel window and contains shortcuts to a few functions.

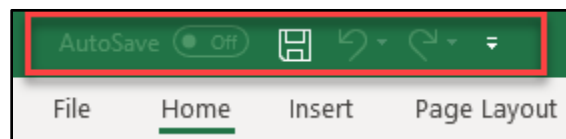


FIGURE 1-1

File Menu/Backstage View in Excel 2010

This is located in the upper left-hand corner. Throughout this manual, it is referred to as the **File menu**. It looks like this:

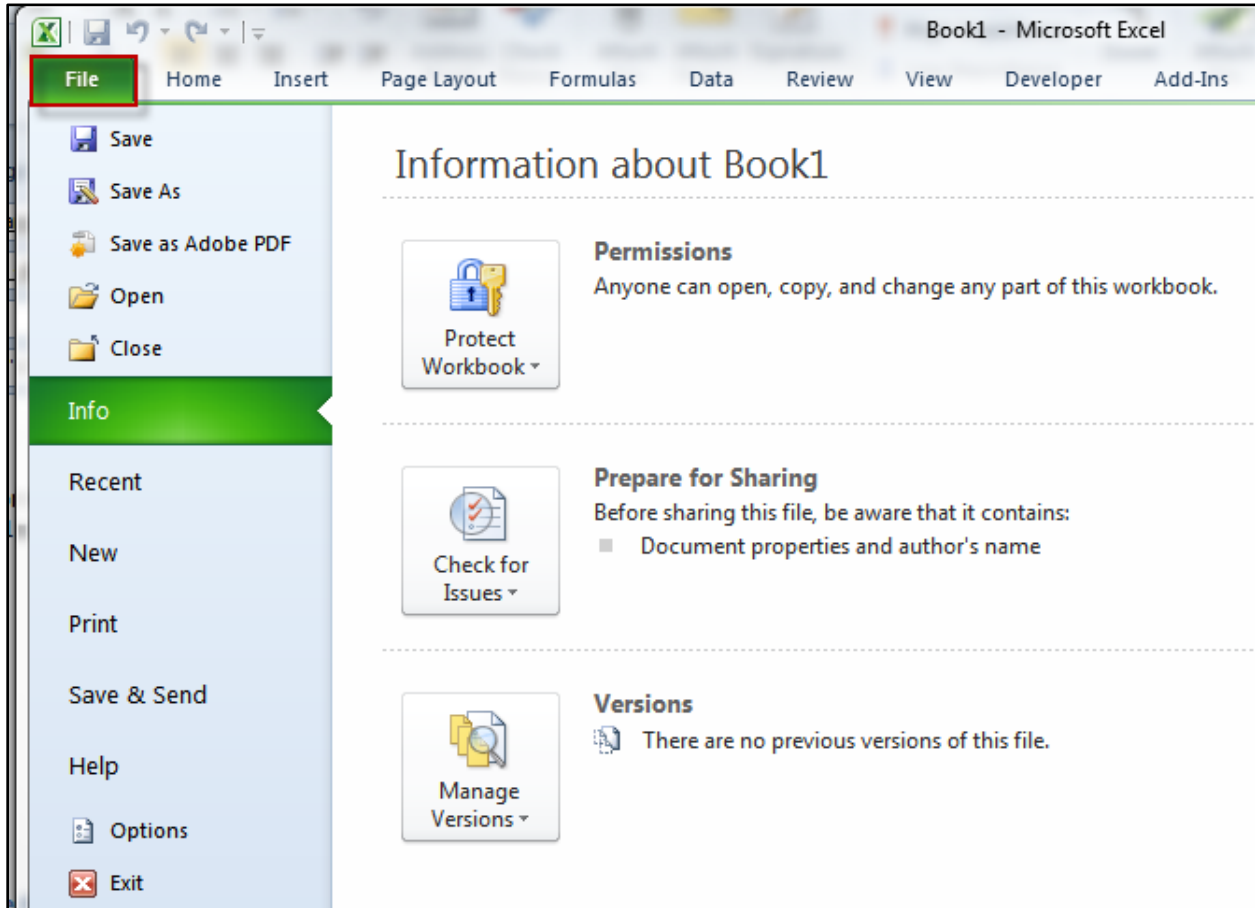


FIGURE 1-2

File Menu View in Excel 2013/16

This is very similar to Excel 2010. As with Excel 2010, it is referred to as the **File menu**.

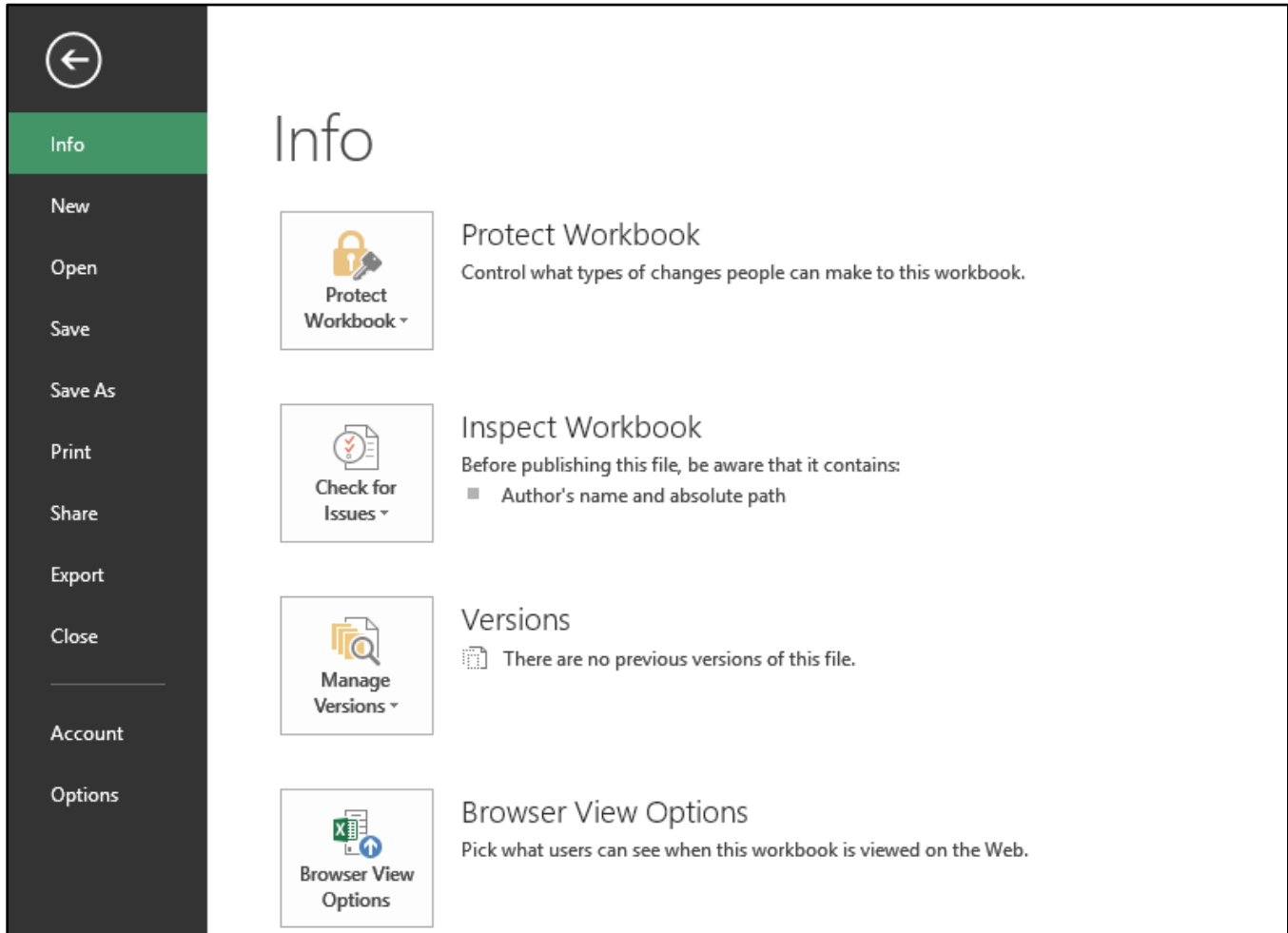


FIGURE 1-3

File Menu View in Excel 2019/365

This is very similar to Excel 2013/2016. Microsoft continues to tweak the File menu view in 2019/365.

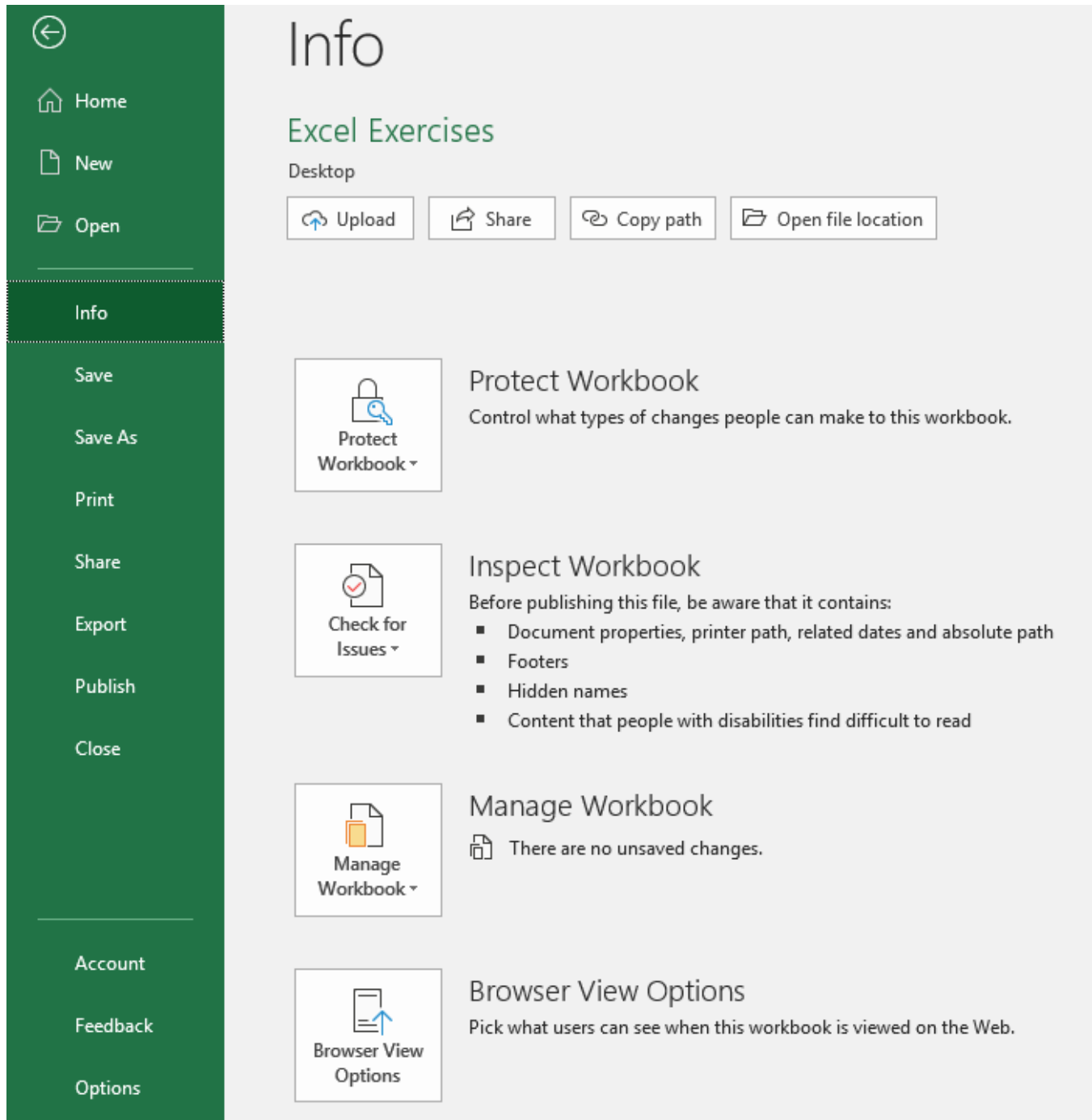


FIGURE 1-4

Start Screen in Excel 2013/16/19/365

Excel 2013 introduced a new start screen.

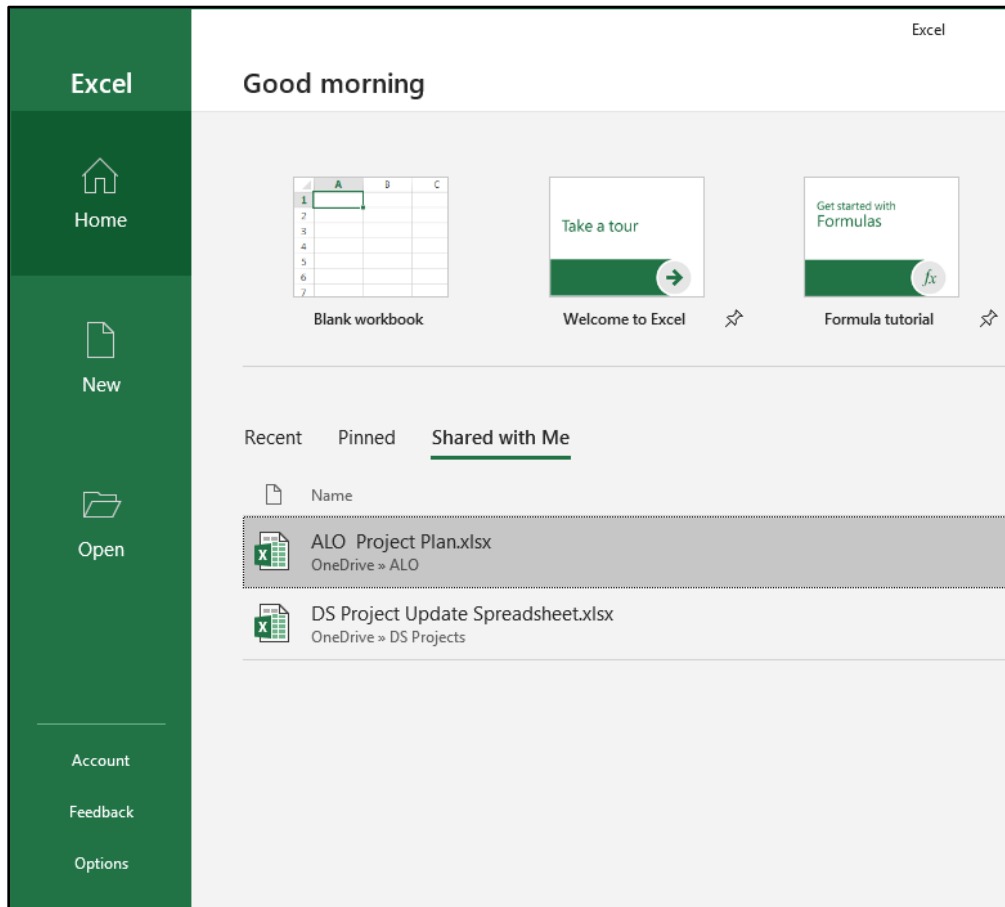


FIGURE 1-5

The start screen can be turned off by clicking the **File** menu (you have to be in a blank workbook to get to the File menu) → **Options** (left side) → **General** (left side, top) → Uncheck **Show the Start screen when this application starts** → click **OK**.

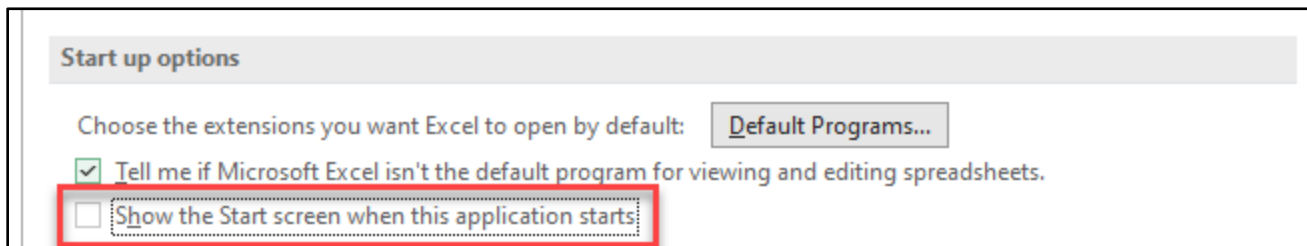


FIGURE 1-6

CURRENT FILE TYPES

Description of the Current File Types

Excel 2007 introduced four (4) new types of files .xlsm, .xlsx, .xltm and .xltx (designated by Microsoft as the "Office XML Formats"). They carry forward to Excel 2010 and 2013. The first two are document files, the last two are templates. The difference is in whether or not they can contain macros. .xlsx and .xltx cannot contain macros. .xlsm

and .xltn can contain macros. The ability for macros to be stored in the old file types opened the door to many types of "macro viruses." By creating files which cannot contain macros, you gain a significant measure of protection against such things. For the most part, lawyers will be using .xlsx files.

Benefits of the Current File Types

Without going into a big techno-babble description, the new formats are much less likely to get corrupted, and they're smaller than the old file types (in terms of bytes). The text of the new documents is stored as XML¹ which is effectively plain text. The exclusion of macros offers a measure of protection against viruses and the text being stored as XML further reduces security concerns. This additional security means that the new files can pass through corporate firewalls without being intercepted as a security risk. Finally, the XML format allows any application supporting XML to access and work with data in the new file format. The application does not need to be part of the Microsoft Office system or even a Microsoft product. This was a distinct shortcoming of the .doc file type since the format is proprietary to Microsoft and they do not release their source code to the public. For Microsoft's explanation of the benefits of the new file formats, please see <http://tinyurl.com/2j2g8s>.

¹ XML stands for Extensible Markup Language. It is a programming language developed by the World Wide Web Consortium which is an "open" standard (not proprietary to any one company) accepted around the world. XML is designed to facilitate the sharing of structured data (such as text in a Word document) across different information systems, particularly via the Internet.