



**SMOKEBALL.** CLE WEBINAR

# Microsoft Excel for Attorneys

*Florida Bar CLE*



**Jordan Turk**

Attorney & Director of Education, Smokeball





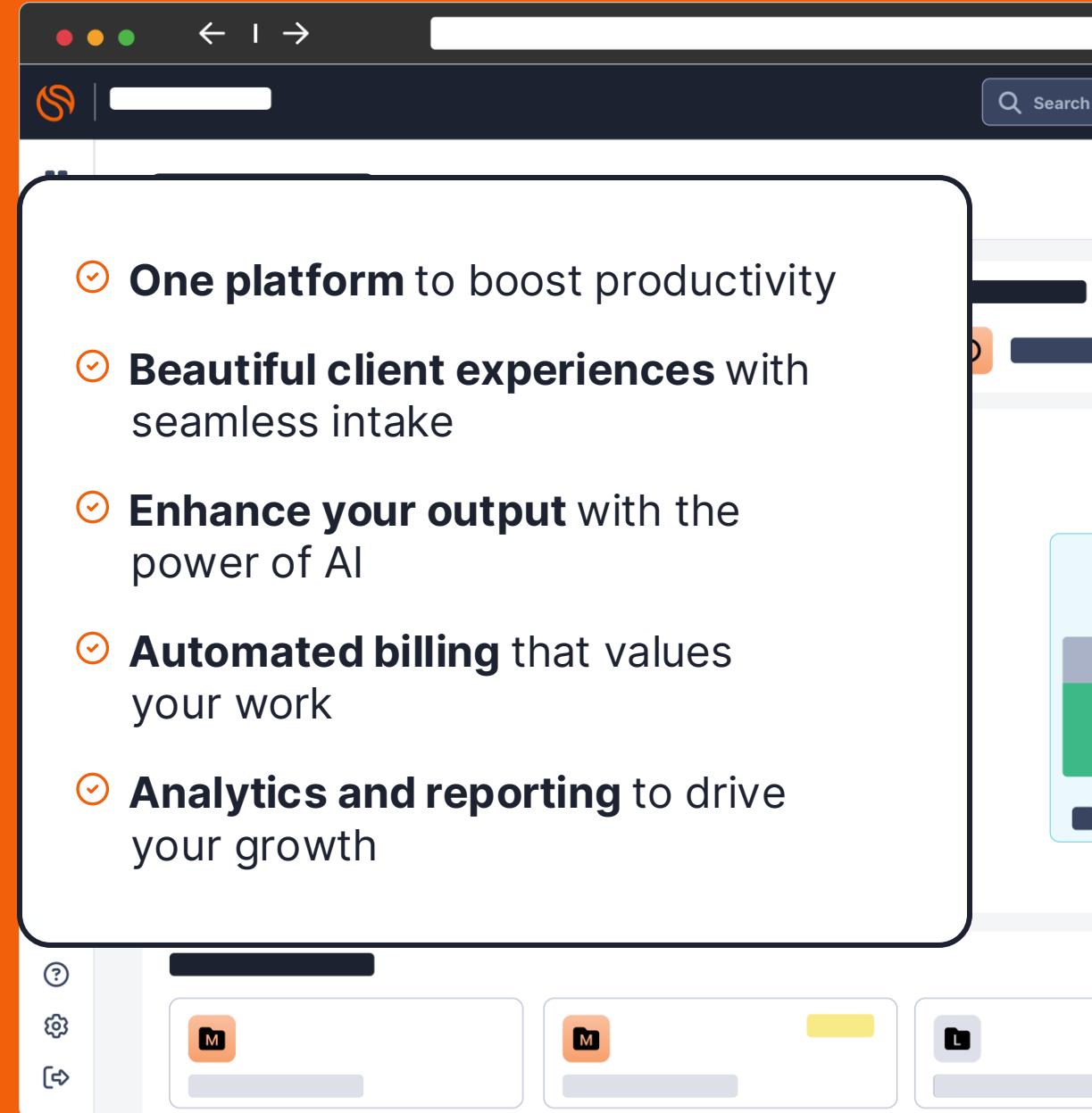
# Jordan L. Turk

**Director of Education & Attorney Development, Smokeball**

- JD, University of Arkansas School of Law
- BA, The University of Texas at Austin
- Practicing Family Law Attorney in Texas
- Host, Hacking Law Firm Success



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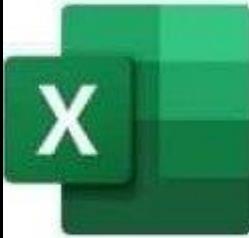
# AGENDA

- **Part 1: Overview, Ethics, and Core Functionality**
- **Part 2: Keyboard Shortcuts**
- **Part 3: Excel Tips and Tricks**

Google when was excel invented X |  

Q: All  Images  Videos  News  Maps  More Tools

About 8,650,000 results (0.62 seconds)

 Microsoft Excel, spreadsheet application launched in **1985** by the Microsoft Corporation. Excel is a popular spreadsheet system, which organizes data in columns and rows that can be manipulated through formulas that

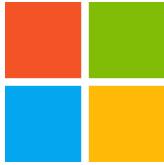


# "Excel was invented 1985"

## People before 1985:



Ahmed Fouad



# Overview, Ethics, and Core Functionality

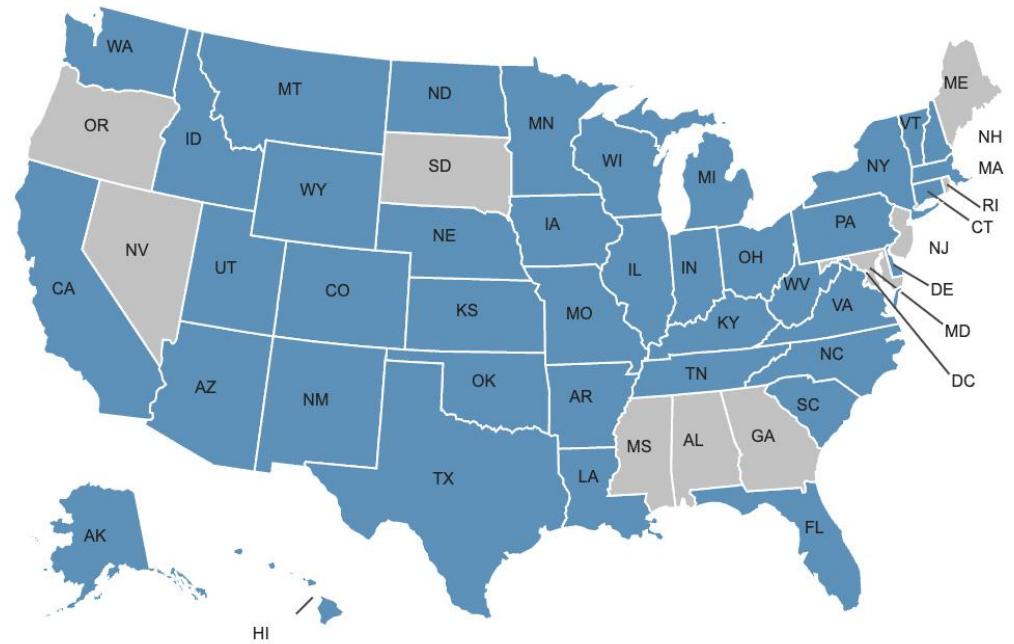
# Ethical Considerations

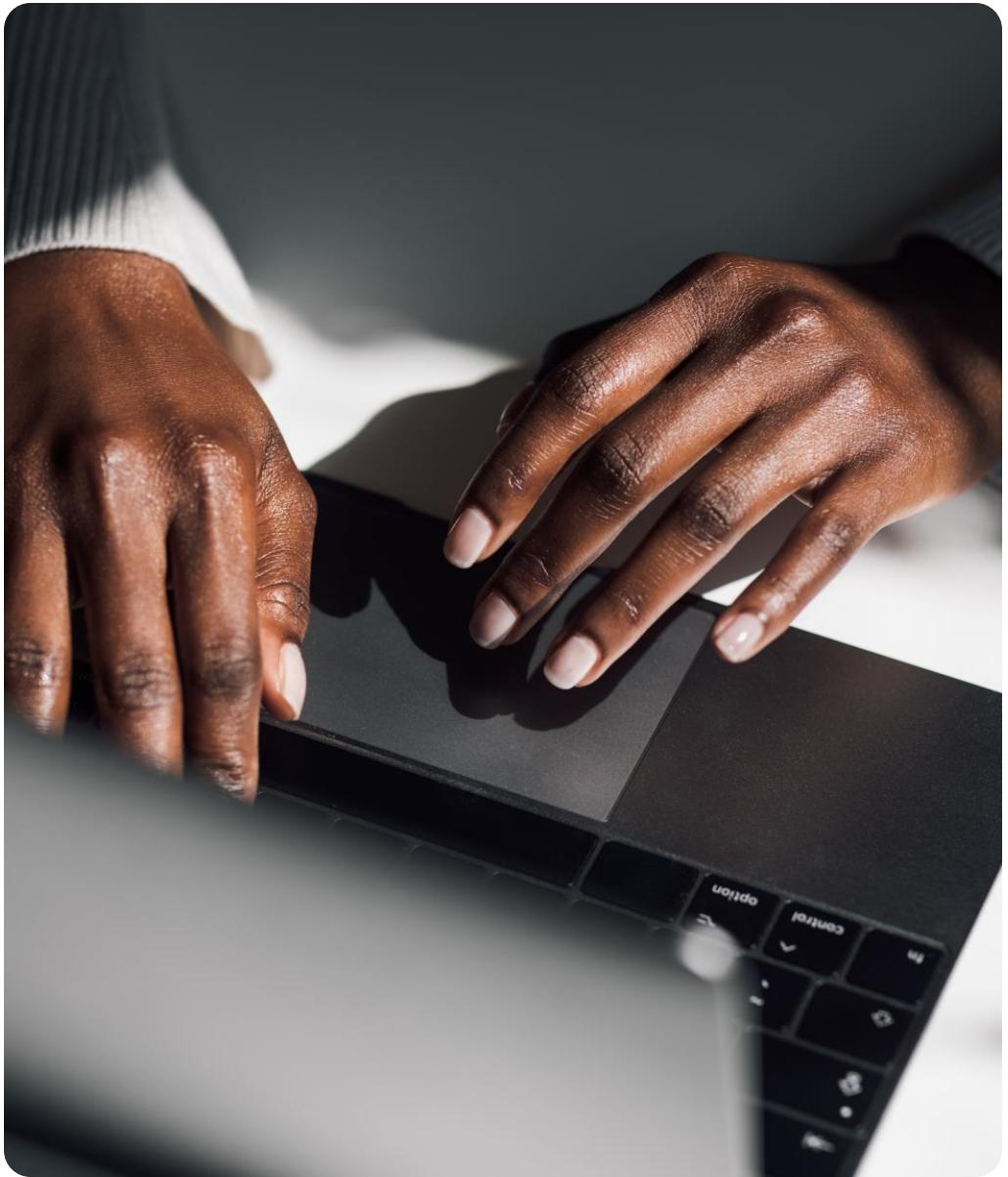
## Tech Competence:

40 States Have Adopted the Duty of Technology Competence

The duty to maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, **including the benefits and risks associated with relevant technology**, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject.

(Emphasis added.)





# Why Should I Care as an Attorney?

- Attorneys need to know how their technology works, even something as basic as Outlook and Excel.
- Some attorneys (I've seen this especially in family law) outsource their Excel work, which to me is unacceptable. We have a duty to be competent in the tech we use, and Excel is **VITAL** to certain areas of law.
- Just because you know how to use the bare bones of the software doesn't mean you are utilizing it well. The goal is to give you the tools to work more efficiently so that your day is freed up to do substantive work on your cases.



# Keyboard Shortcuts

# Excel Keyboard Shortcuts

- CTRL + C = Copy
- CTRL + V = Paste
- CTRL + Z = Undo
- CTRL + N = New Excel doc
- CTRL + S = Save
- CTRL + A = Select All
- F2 = Edit the active cell
- F7 = Run the Spellchecker
- Delete = Delete content in cell



memes.xlsx  
@ExcelHumor

when you learn excel shortcuts

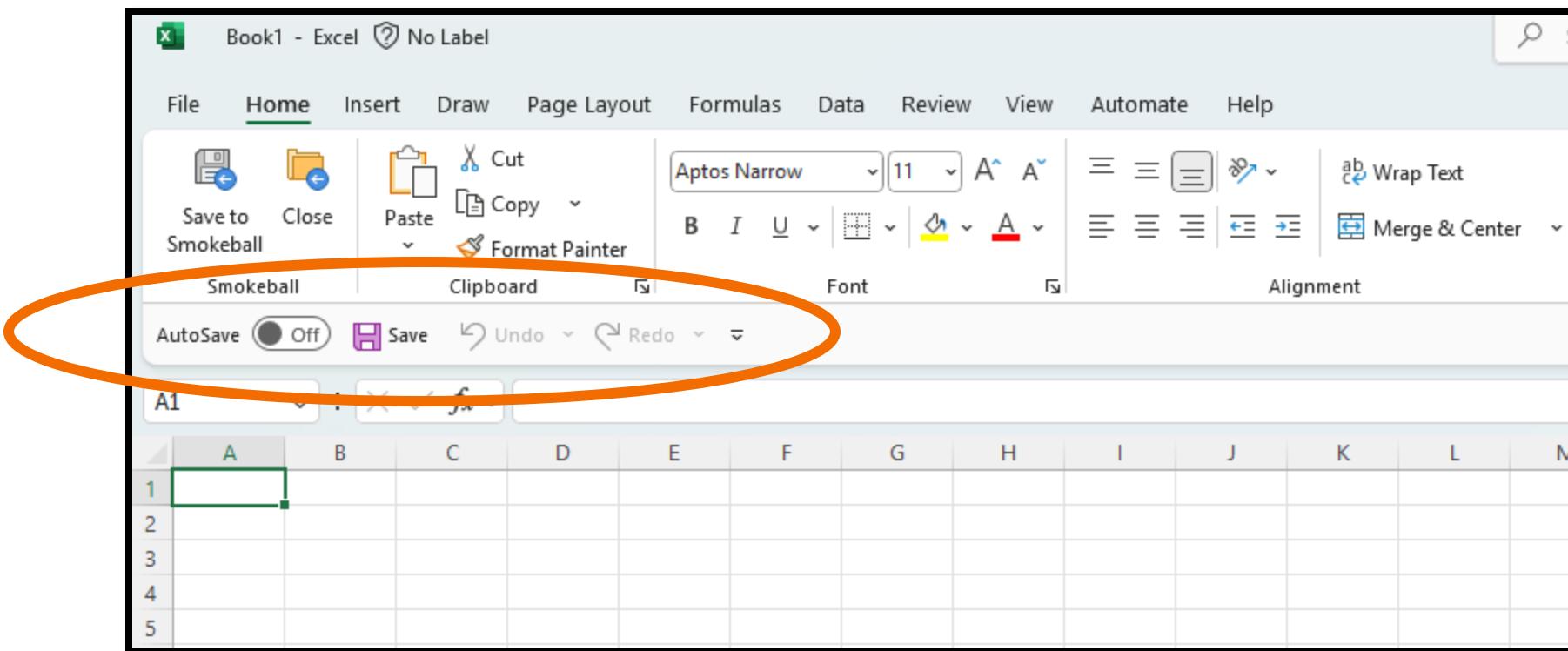


**Get comfortable with these! The less you need to use your mouse, the better.**



# Excel Tips and Tricks

# You can change its positioning to make things more convenient:





# Useful Tips

- **Freeze Panes (freeze your top row so when you scroll down, the top row stays put):**
  - Select row to freeze (highlight) -> View Ribbon -> Freeze Panes -> Freeze Top Row

The screenshot shows a Microsoft Excel spreadsheet titled "Hours Worksheet Template.xlsx". The "View" tab is selected in the ribbon. The "Freeze Panes" dropdown is open, with "Freeze Top Row" highlighted. The main table has rows 1 and 2 frozen, allowing the column headers to remain visible as the user scrolls down. The table data includes columns for Case, Description, Time, and Case, with rows for Smith, Kaylee and Wise, Samuel.

- **Conditional Formatting (when you are keeping track of deadlines on Excel sheets):**
  - Highlight column/row with dates -> Home Ribbon -> Conditional Formatting -> Highlight Cell Rules -> A Date Occurring -> Next Week

The screenshot shows the "Conditional Formatting" dropdown menu open, with "Highlight Cell Rules" selected. Sub-options include "Greater Than...", "Less Than...", "Between...", "Equal To...", "Text that Contains...", "A Date Occurring...", and "Duplicate Values...".

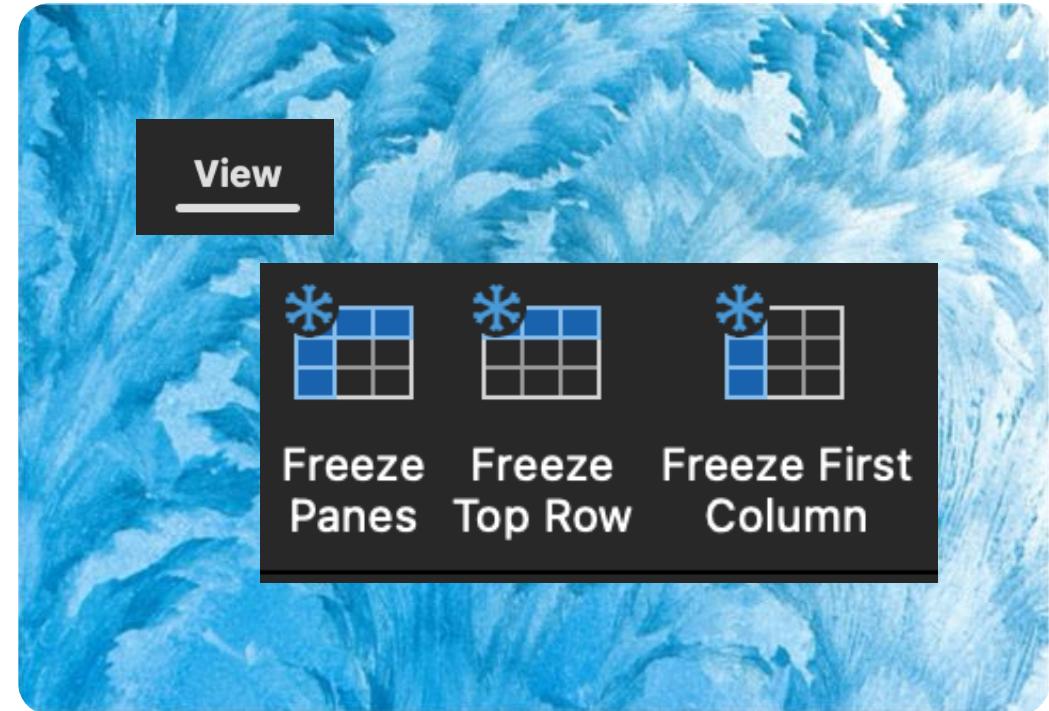
# Tips & Tricks: Freezing Cells, In Detail

Select what row/column you want to freeze.

**View ribbon → freeze panes/top row/first column**

**PRO TIP**

I like to freeze and bold the top row/column.



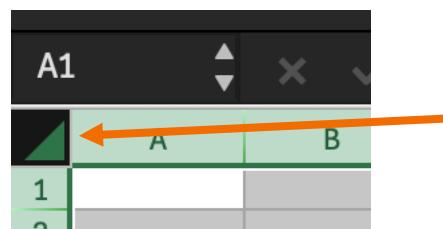
# Tips & Tricks: Visibility

- **Being able to actually see the cells**
  - The standard font size is 11/12, which looks a lot tinier in Excel than in Word.
  - You can Zoom in (bottom right-hand corner of doc) to 150%. Or hold CTRL+A and then change the text to a different size once everything is highlighted.
- **Column widths:**
  - You can go between the boundaries and drag it yourself; OR
  - Hold your cursor between the columns. You'll see a double arrow, and if you double click, it will auto expand the column to accommodate your content.

## PRO TIP

**Don't want to go column by column to expand the width?**

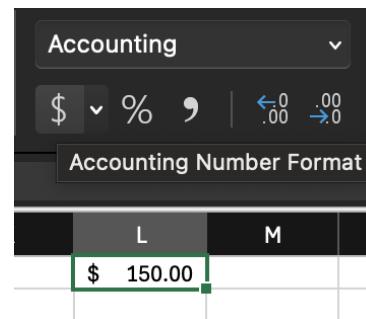
Click that box in the upper lefthand corner of the doc, which selects the entire doc. Then double click in-between the columns like before – this time will resize all the columns at once



# Tips & Tricks

Let's say you have a **trust account report**, and you want specific columns to be recognized as numbers instead of dates, etc.

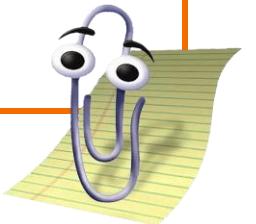
- Highlight the relevant columns, then find the \$ icon (Home ribbon → Number tab → \$)
- The dollar sign will be added to these columns now



## PRO TIP

**The shift buttons let you select multiple Excel rows/columns/cells**

Want to select non-contiguous columns? Or just random cells? Hold down CTRL and click on what you want.



# Tips & Tricks: Functions

## SUM Function

Go to the bottom of a column. Type “Total” into column to the left. Then in column to the right, type =SUM (a menu will pop up), stick with SUM, and then type in range with () .

OR you can drag your mouse across what you want.

## Average Function

=AVERAGE(range)

## Min Value

=MIN(range)

## Maximum Value

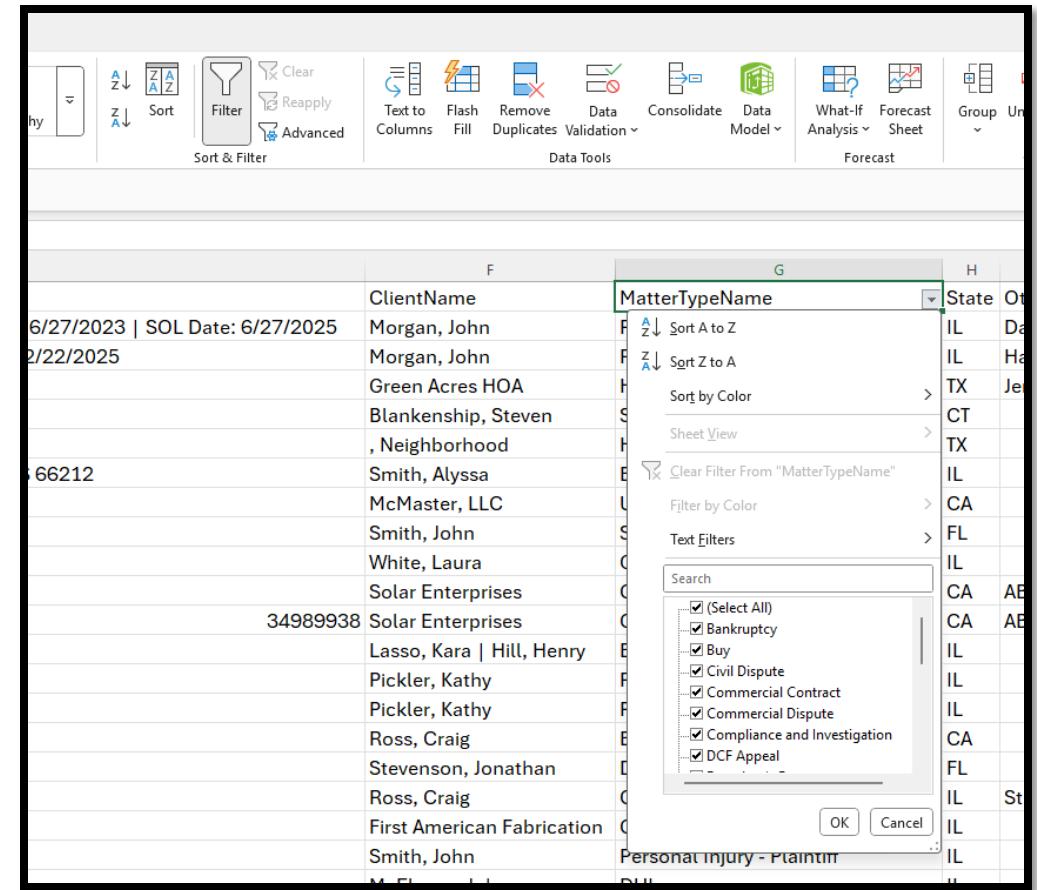
=MAX(range)

Avoids the issue of having to look through hundreds of pages of excel data.



# Useful Tips

- **Sorting and Filtering (for Discovery or Billing)**
  - Select row or column you want to sort -> Data Ribbon -> Click Sort -> go to row/column you highlighted and click on the drop down
  - Useful if you want to break down by biller in your financial reporting or discovery, etc.

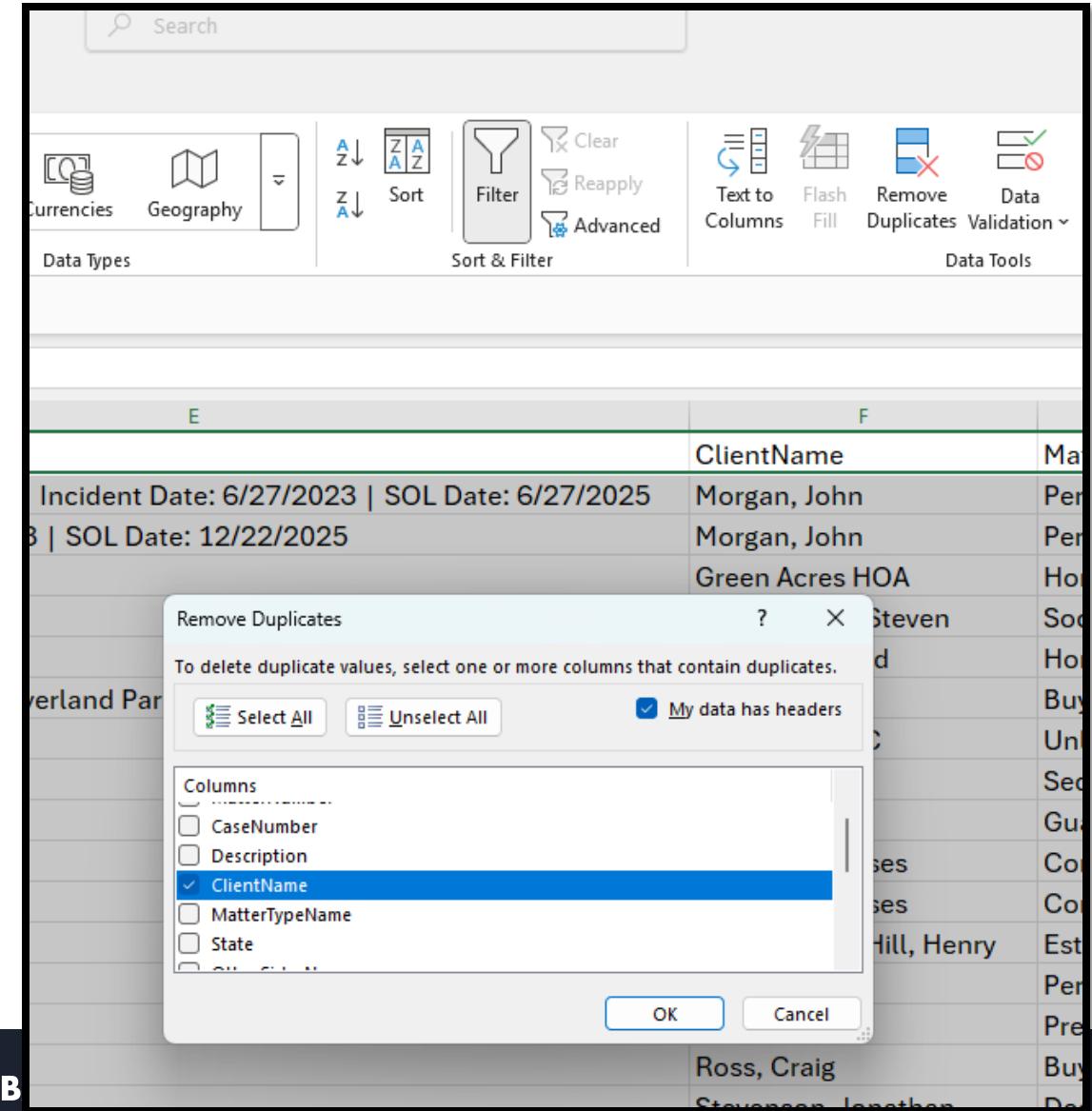




# Useful Tips

- **Remove Duplicates/Clean Up Data**

- Highlight entire spreadsheet -> Data Ribbon -> Remove Duplicates -> Select applicable column -> OK





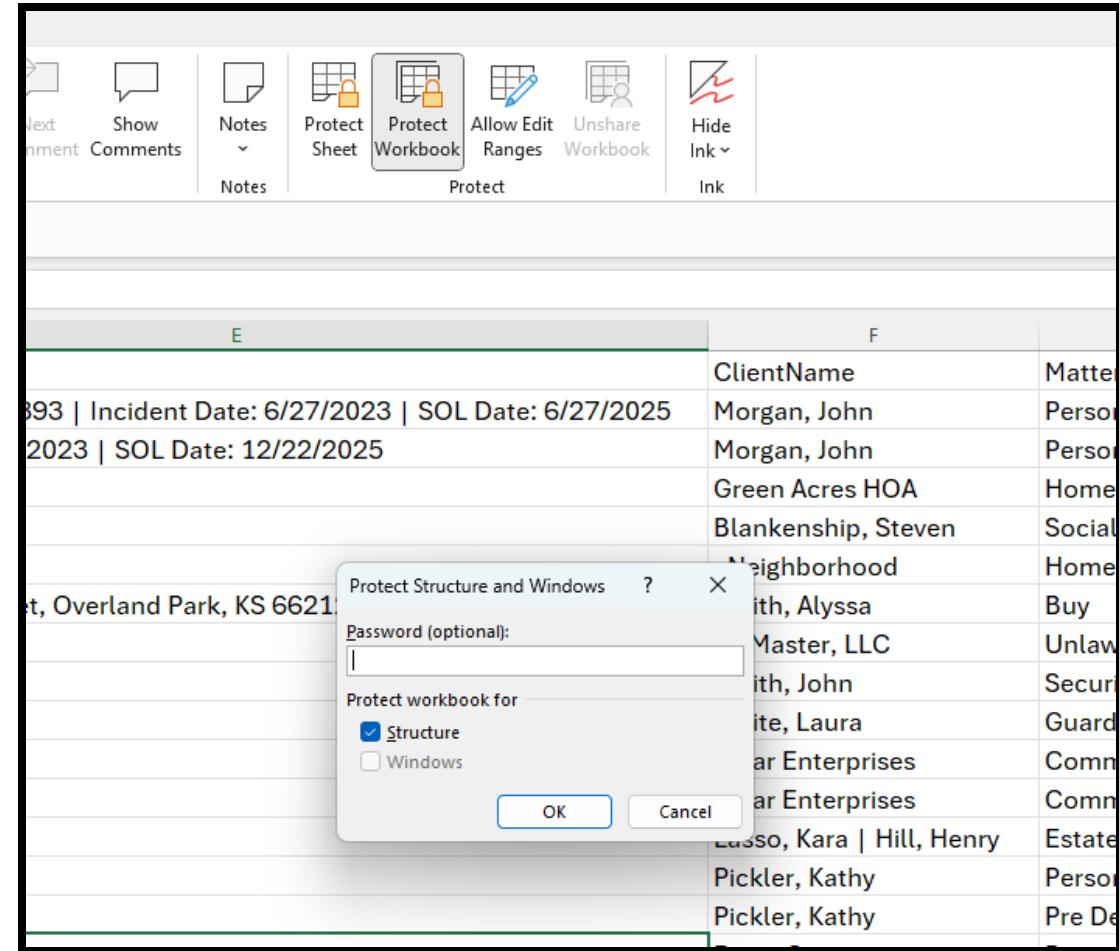
# Useful Tips

- **If, And, Or Functions for Quick Logic**
  - Check whether a deadline is overdue, whether trust balances meet requirements, or whether discovery responses are late.
  - Example:  
`=IF(TODAY()>D2,"Overdue","On Time")`

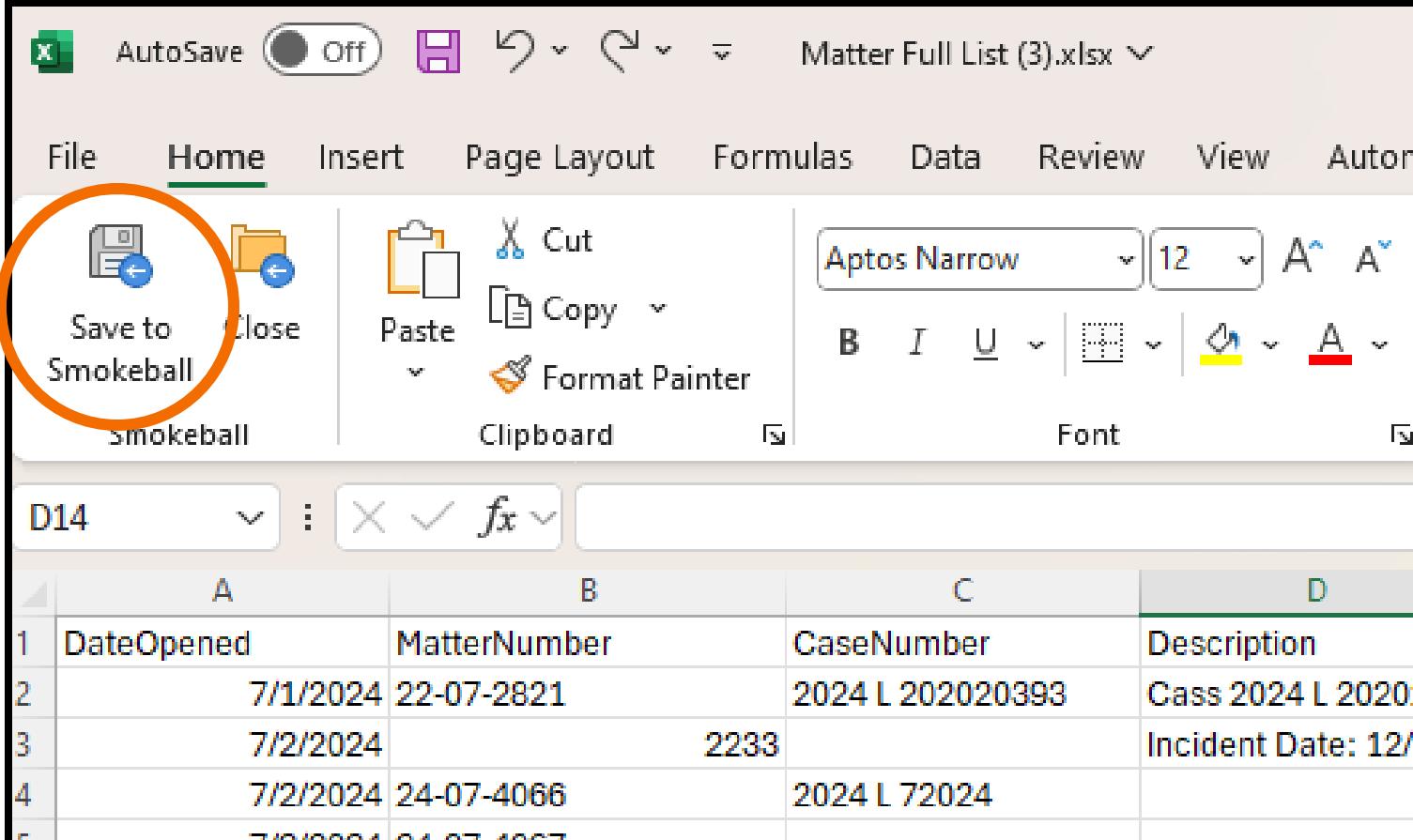


# Useful Tips

- **Protect Your Worksheets!**
  - Lock down formulas in billing spreadsheets, restrict editing of sensitive columns, or track changes when collaborating with staff.
  - *Review Ribbon → Protect Sheet/Workbook*



**Seamlessly  
save it down to  
your case file**



The screenshot shows a Microsoft Excel interface with a data table. The ribbon at the top is visible, showing tabs like File, Home, Insert, Page Layout, Formulas, Data, Review, View, and Autom. The 'Home' tab is selected. On the far left of the ribbon, there is a 'Save to Smokeball' button, which is highlighted with a large orange circle. Below the ribbon, there is a toolbar with various icons for cutting, pasting, and formatting. The main area of the screen displays a table with four columns and six rows of data. The columns are labeled A, B, C, and D. The data is as follows:

	A	B	C	D
1	DateOpened	MatterNumber	CaseNumber	Description
2	7/1/2024	22-07-2821	2024 L 202020393	Cass 2024 L 2020
3	7/2/2024		2233	Incident Date: 12/
4	7/2/2024	24-07-4066	2024 L 72024	
5	7/2/2024	24-07-4067		

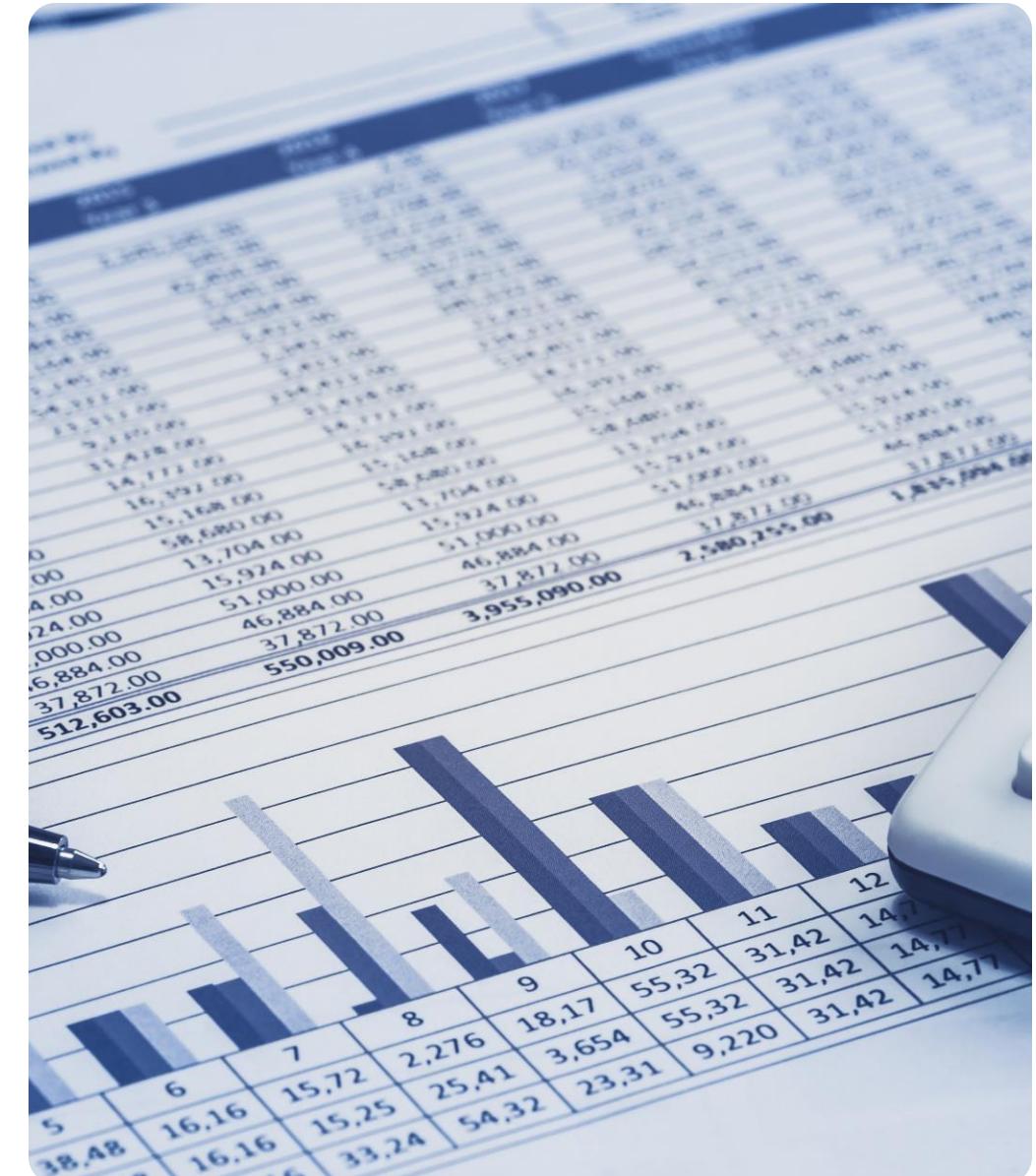


# Attorney or Staff Timesheets

- Easy to assemble in Excel, especially now that you know the SUM function!
- Easier way to track your time if you don't have technology to help you
- Can add in other functions, such as multiplying by your hourly rate, to track projected revenue
- Have the Excel sheet always open on your computer and keep adding to it during your workday.

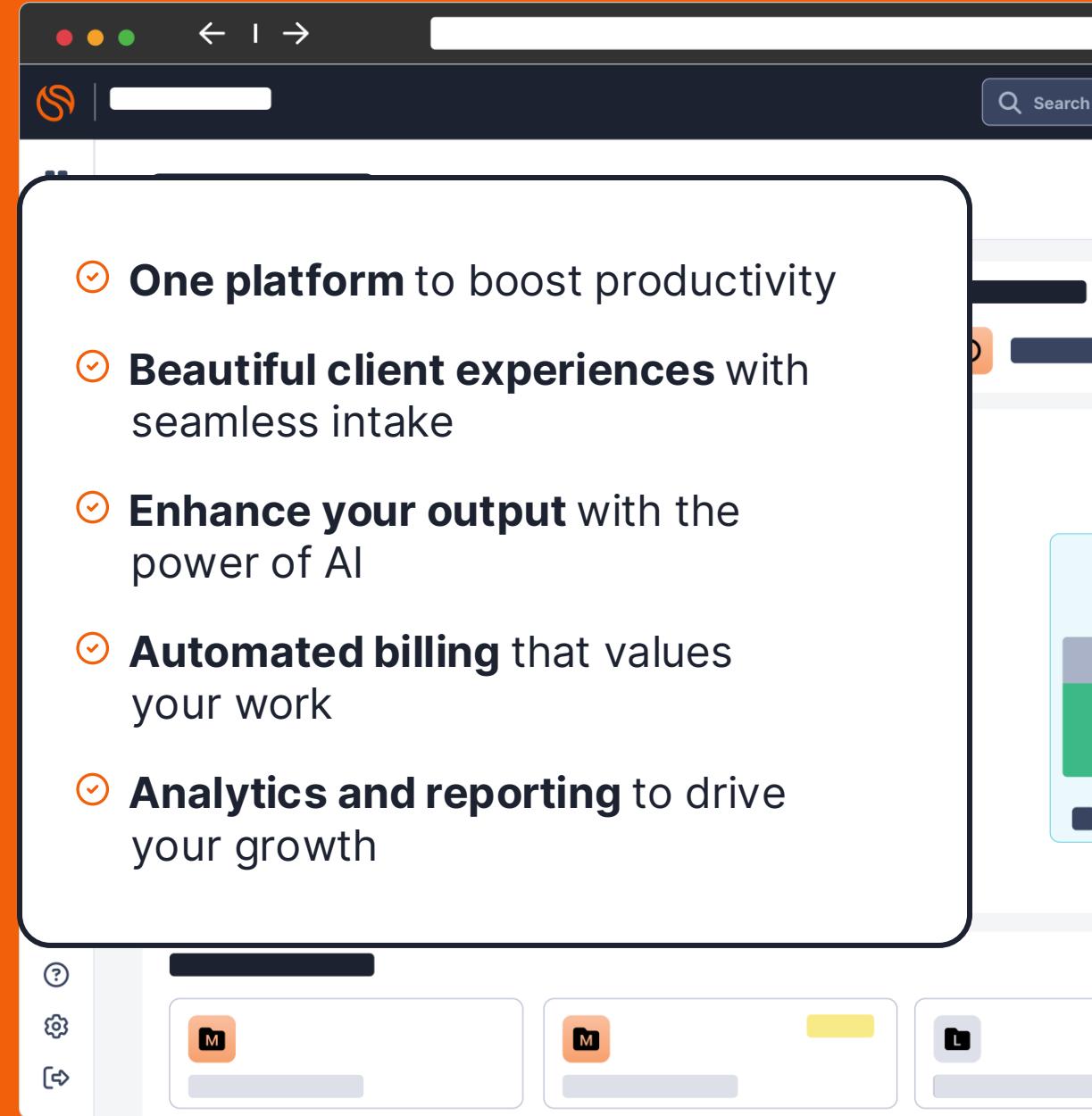
# Reporting and Crunching Numbers for Your Firm

- Most reports that you pull will come to you as an Excel/CSV file
- Becoming more comfortable with Excel means that you get more comfortable with your law firm data, so you can start creating things like pivot tables and get acquainted with data forecasting (e.g., my spreadsheet says I made \$X this year, and I want to make 20% more next year, so I put that into my Excel doc which runs the numbers for me)





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# **Would you like to learn more about how Smokeball can work for your firm?**

If **yes**, one of our law firm specialists will follow up.



**Yes**



**Not at this time**



**I'm already a  
Smokeball user**

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# Florida Bar CLE Information

## CLE Credits:

- General – 1.0 hour
- Technology – 1.0 hour

## Additional Information:

The course number for today's webinar is **9527**. This webinar has been approved by The Florida Bar Continuing Legal Education Department for 1.0 hour of General CLE credit, including 1.0 hour of Technology CLE credit. Please self-report this course in the member portal.



# Questions?



# Thanks for joining!



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