



# MICROSOFT EXCEL

for LEGAL PROFESSIONALS

Covering Excel for Windows  
Versions 2007, 2010, 2013 and 2016



# MICROSOFT EXCEL

## FOR LEGAL PROFESSIONALS

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

Barron is an attorney who has over 20 years of experience in legal technology. After earning his B.S./B.A. (marketing and economics) and J.D. from The Ohio State University, Barron discovered his passion for helping lawyers fix problems within their practice. Today, Barron partners with our clients to make law firms and legal departments more efficient. Barron's breadth of knowledge enables him to dive into the details of a firm's operations. He is often the lead on Comprehensive Practice Analysis projects for clients that examine all aspects of making a firm more successful: technology, organizational design, process optimization and financial practices.

### JOHN FEDERICO

John's specialty is "making technology do cool things it wasn't necessarily intended to do." Having practiced as an attorney, John understands the rigors of practicing law, but he also empathizes with the demands placed on a legal professional's time. With this in mind, he saves time for his clients by leveraging document automation technologies like HotDocs and Microsoft Word, to drastically accelerate the drafting, reviewing, and editing of legal documents.



### JEFFREY SCHOENBERGER

Jeff is our resident Apple guru. After practicing law as an Equal Justice Works / AmeriCorps Legal Fellow for the Legal Aid Society of Southwest Ohio, Jeff joined Affinity, and brought his unique ability to discover faster and better ways for clients to do everyday tasks to our team. Because Jeff understands the worlds of both PC and Mac users, clients using any type of system can count on him to help with desktop office software and document assembly needs regardless, of the type of computer an office has. Jeff is also well versed in Apple's iOS, so he can aid clients in making the most of their tablets and mobile devices.

### DANIELLE DAVISROE

After working as an attorney in domestic relations for several years, Danielle found her way to Affinity and to this day she is always on the lookout for better ways to do things. She carries new strategies she finds with her as she works with the clients her team supports. Danielle has a Bachelor of Science in Business Administration from The Ohio State University Fisher College of Business and a Juris Doctorate from The Ohio State University Moritz College of Law.



### ADAM RINGEL

With four years' experience as a personal injury attorney, Adam is a valuable member of our document automation team. In addition to his skill in helping make legal drafting more efficient through technologies like HotDocs and Microsoft Word, Adam provides training on the Microsoft Office Suite and builds custom data queries for our clients. With the highly collaborative nature of the document automation team based in Columbus, Adam is constantly invigorated by his colleagues. The group consistently helps one another find new insights and perspectives along the path of finding the solutions our clients need.

### CYARA HOTOPP

After graduating cum laude with a Bachelor of Arts in Philosophy from The Ohio State University and a Juris Doctorate from The Ohio State University Moritz College of Law, Cyara knew she wanted to use her education to solve problems for legal professionals. She is also currently working on getting an MS in Information Assurance. Cyara works with law firms and legal departments to help streamline the drafting of complex documents. Her technological understanding coupled with her background in law means she doesn't just make a document work properly, but she also advises on truly improving the document from a best practices perspective.



# MICROSOFT EXCEL FOR LEGAL PROFESSIONALS

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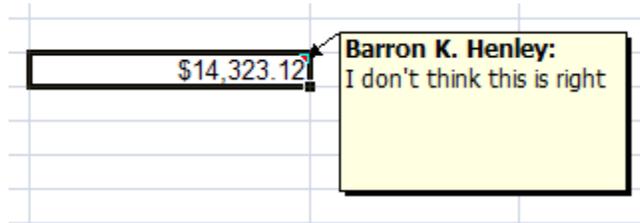
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# 6 REVIEWING AND PROTECTING WORKSHEETS

## EXERCISE 7 - COMMENTS

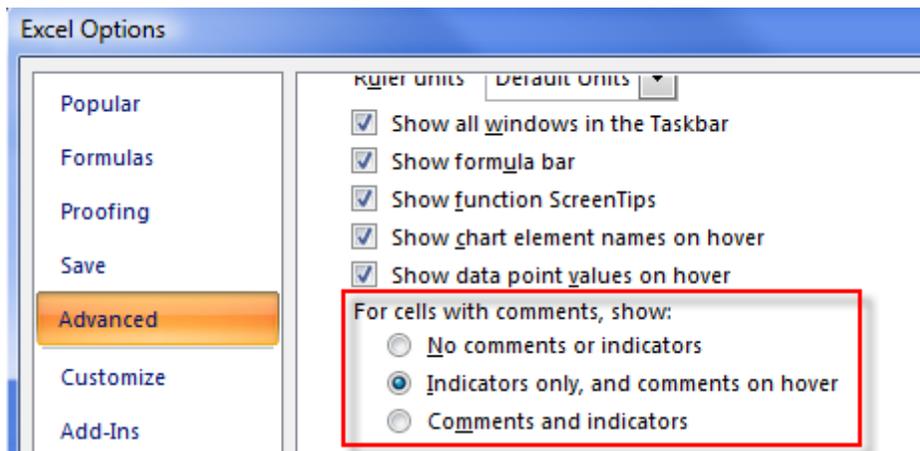
### Adding Comments To A Workbook

You can easily add comments to a worksheet you're reviewing. Simply click on the cell you want to comment on → click the Review ribbon → New Comment button. Type your comment and you're done.



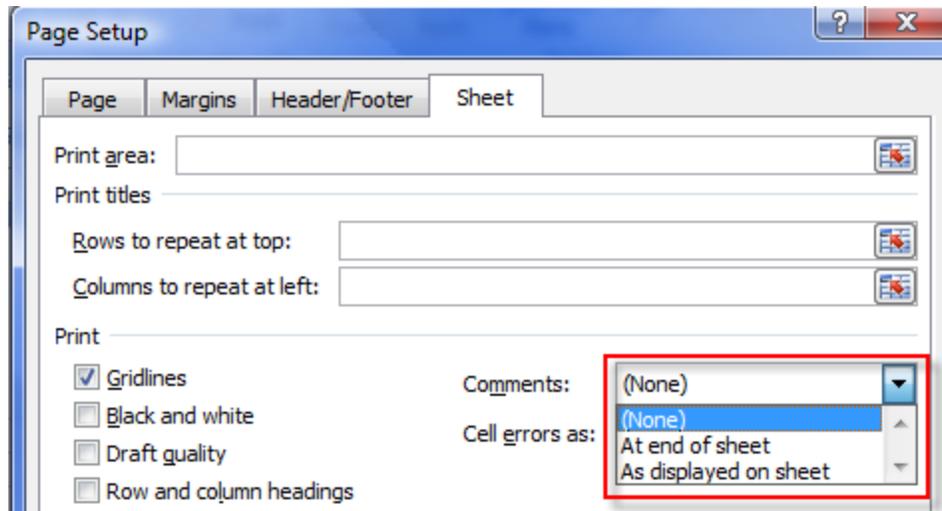
### Changing The Way Comments Appear in the Worksheet

By default, comments are only indicated by an indicator (red triangle in the right, upper corner of a cell). When you hover over the, the comment appears. However you can change the way Excel 2007 displays them by clicking OB → Advanced → change the option under "For cells with comments, show:". In Excel 2010/13/16, click the File menu → Advanced → scroll down to the Display heading on the right side → change the option under "For cells with comments, show:"



## Printing Comments

By default, comments do not print at all. If you'd like to print them, click the Page Layout ribbon → Page Setup Launcher → click the Sheet tab → change the option for Comments:





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