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LITIGATORS, SMALL LAW FIRMS, SOLO PRACTITIONERS, TECHNOLOGY

Why Excel Is The Most Underappreciated Program In Your Law Office

By JEFF BENNION

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Microsoft Excel just does not get the respect that it deserves in law offices. It's underutilized and underappreciated. It's not that people don't need Excel for day-to-day use in a law office, I think the problem is that people just don't know how to use it very

well.

Excel is not just a program for adding up numbers in columns; it's a program for organizing data and analyzing the relationship between the data. You can use it as a database, contact management software, a billing database, a calendaring program, or a thousand other legal uses. Excel is not going to replace more expensive specialty litigation software, but here are some ways you can use it to increase your productivity:

Calendaring Court Dates

If your deadline to file your motion for summary judgment motion is 70 days before the hearing, how do you calculate it with a hearing date of July 17, 2015, if you also have to add 5 days for mailing? Try this:

“

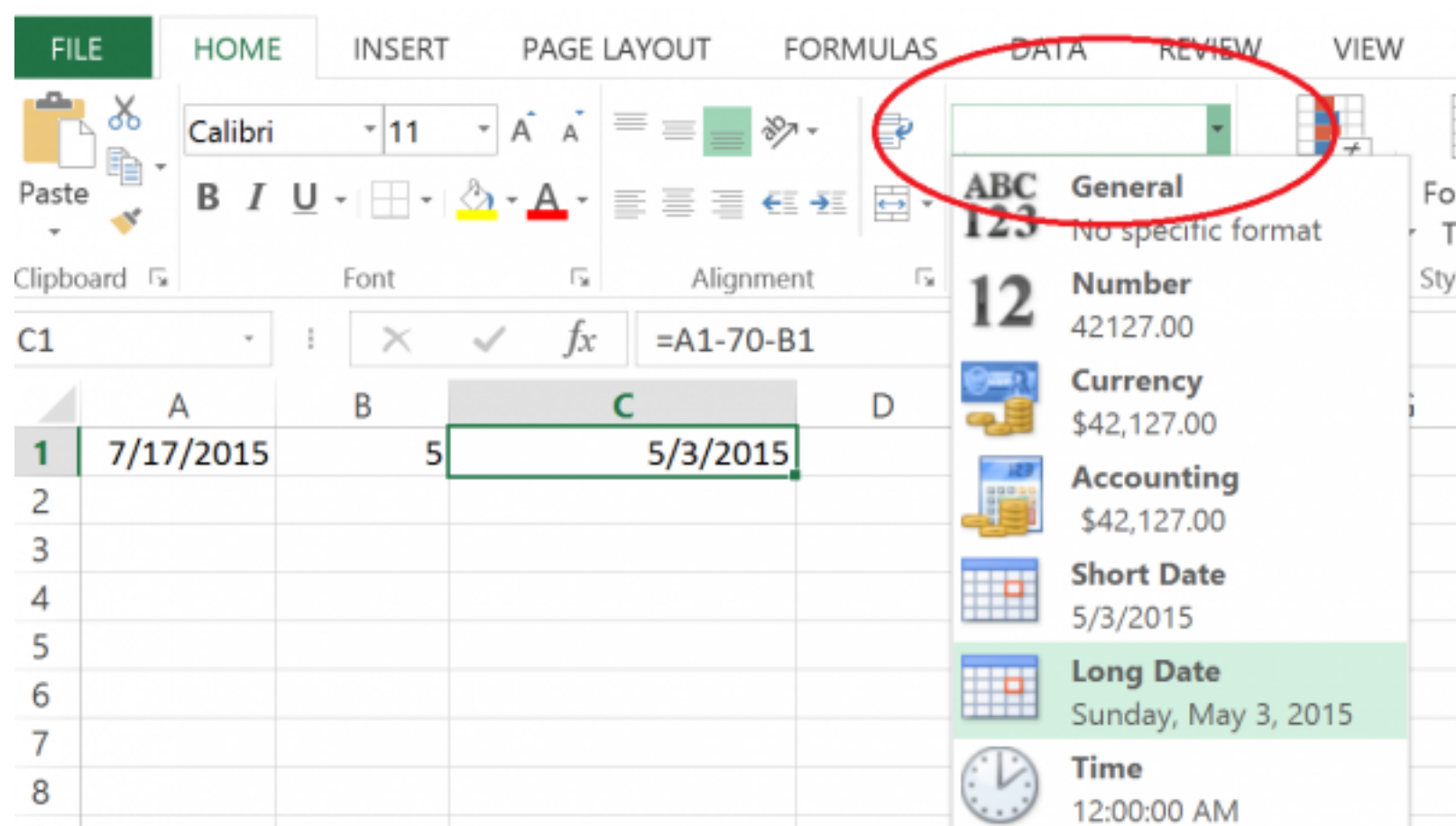
In cell A1, type: =7/17/2015

In cell B1, type: 5

In cell C1, type: =A1-70-B1

Want to see if you have calculated a date that falls on a weekend? Do this:

Click the cell C1. Under the dropdown box where it says “Date,” select “Long Date.” If your calculation shows a date on a Saturday or Sunday, move it to the Friday before. If you now see a bunch of # signs, your column is too narrow. Put your cursor between the C and the D and drag the C column out wider.

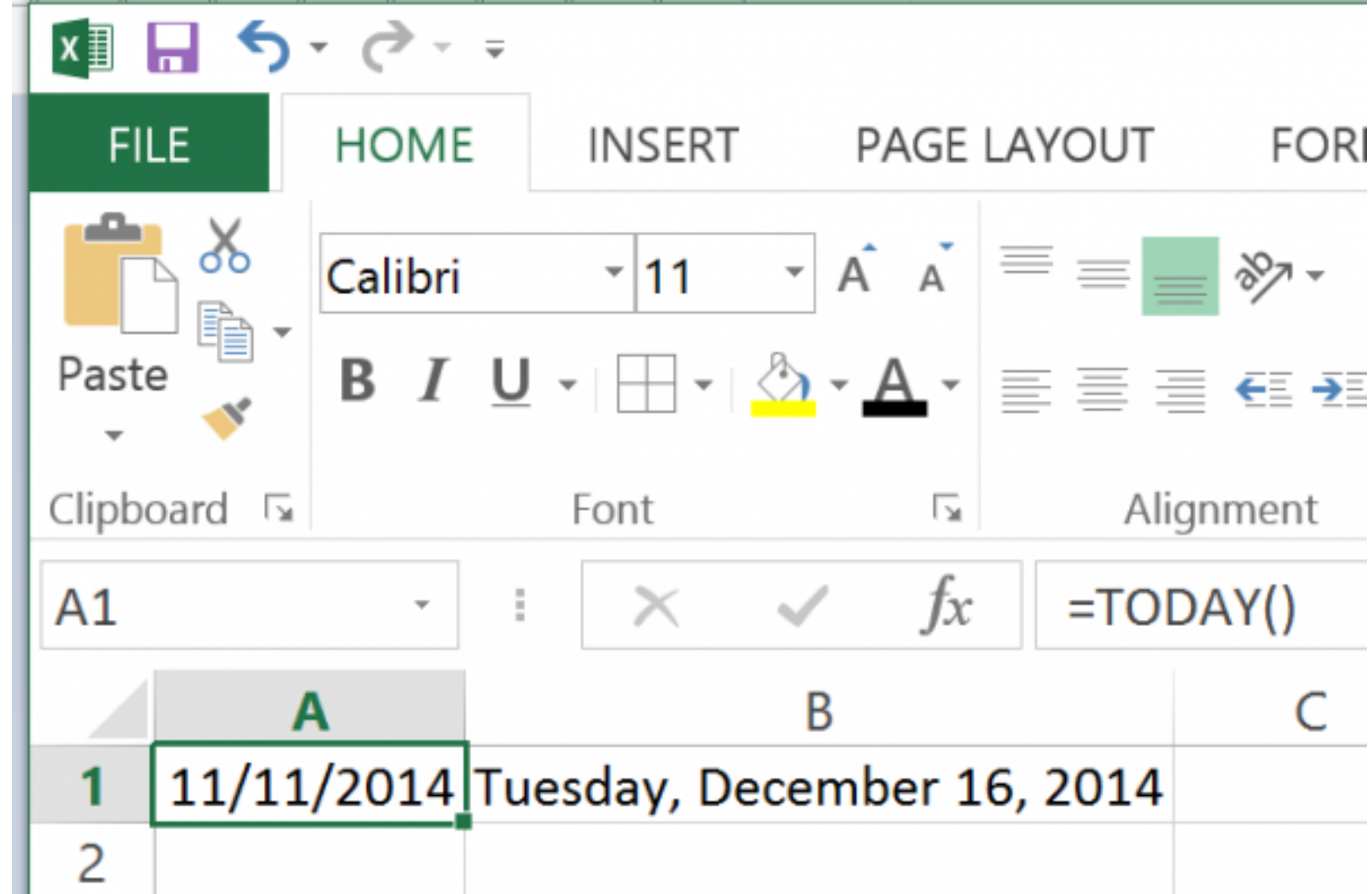


What about if you want to calculate when the interrogatories you just propounded are due if it's 30 days from today plus 5 days for out-of-state-mail service? Do this:

“

In cell A1, type: =today()

In cell B1, type: =A1+30+ 5



Analyzing Voluminous Privilege Logs

What if opposing counsel gives you a PDF version of a privilege log that is several hundred pages — how do you begin to analyze that? You can use Adobe Acrobat to save it as an Excel spreadsheet. Then, highlight all of the data and choose “Format as Table.”

Date	Author	Type of Document	Privilege Asserted
6/6/2006	John	e-mail	attorney client
6/7/2006	John	picture	attorney client
6/8/2006	Sally	e-mail	attorney client
6/9/2006	Smith	chart	attorney client
6/10/2006	John	PowerPoint	attorney client
8/9/2010	Smith	PowerPoint	attorney client
9/30/2014	Sally	e-mail	attorney client
4/30/2009	Roger	e-mail	attorney client

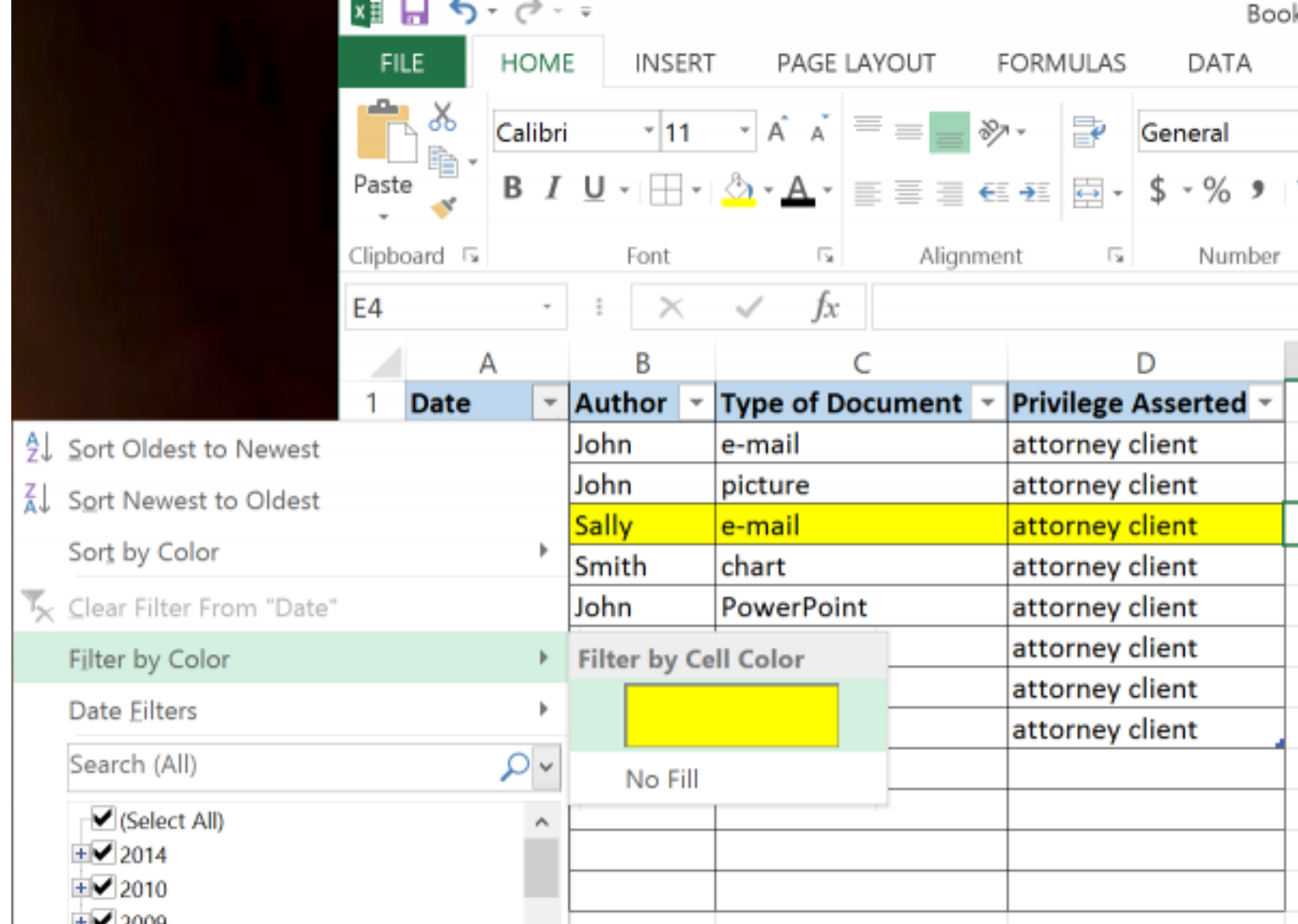
Hopefully your privilege logs are more detailed than this

Now that it’s a table, you can filter the data more easily. Say, for example, that you want to focus on just documents from 2006. Click on the little arrow by the Date column:

1	Date	Author	Type of Document	Pri
		John	e-mail	att
		John	picture	att
		Sally	e-mail	att
		Smith	chart	att
		John	PowerPoint	att
		Smith	PowerPoint	att
		Sally	e-mail	att
		Roger	e-mail	att

Uncheck “Select All” and put a check by just 2006. You can do this for other columns also. So, if you are wondering why PowerPoints are attorney-client privileged, filter that column to show just PowerPoints.

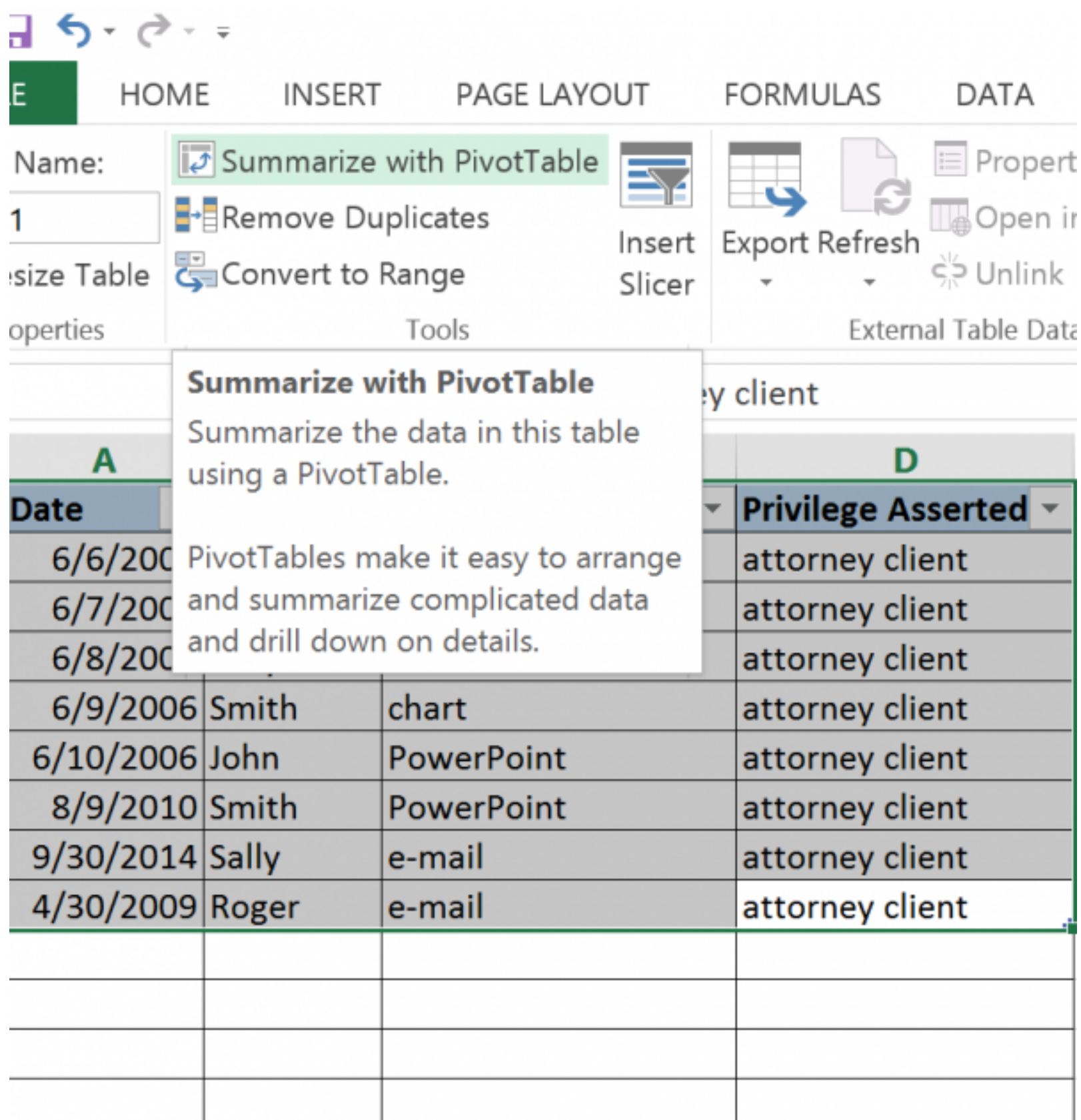
One you have reviewed the data you want and find something that jumps out at you, highlight the rows. Use a different color for different issues. Then, filter your table to show just the highlighted rows by clicking on a dropdown arrow and choosing to filter by color:



Power e-discovery tip: most load files are produced in a file format that can be opened in Excel. Save a copy of your load files and open them in Excel. Change the data to a table and get some quick, sortable data about your large productions.

Deeper Analysis With Pivot Tables

Pivot Tables let you prepare statistics about the data in your table. Here, let's count how many of each file type we have. I highlight my table and select Summarize with Pivot Table under the table tab:



Now, I have a new sheet that has a blank table. I have my options to set up the table on the right and the table itself on the left. To calculate how many of each document type, I am going to drag “Type of Document” down into the Columns area below. Next, I drag it also into Values.

PivotTable Fields

Choose fields to add to report:

☐ Date

☐ Author

☒ **Type of Document**

☐ Privilege Asserted

MORE TABLES...

Drag fields between areas below:

▼ FILTERS

≡ ROWS

|||| COLUMNS

Type of Docume... ▼

Σ VALUES

Count of Type o... ▼

This creates a table where there are column headers for each document type and underneath, there is is a count of each document type. It should look like this:

FILEHOMEINSERTPAGE LAYOUTFORMULASDATA REVIEWVIEWAC

PivotTable Name: PivotTable1

Active Field: Count of Type of

Options ▼

Field Settings

Drill Down

Drill Up

Expand Field

Collapse Field

Group Selection

Ungroup

Group Field

Insert Slicer

Insert Timeline

Filter

A3

A

B

C

D

E

F

1

2

3

4

5

6

7

8

9

10

11

12

13

14

Column Labels

chart

e-mail

picture

PowerPoint

Grand Total

Count of Type of Document

1

4

1

2

8

Here, I see that 4 of the 8 documents are e-mails.

Conclusion

There is so much that you can do in Excel. You can create billable time databases and filter them to show only certain months on an invoice you send to a client. You can do charts and graphs. Spending the time learning how to use the additional features of Excel, or any program, can help you work more efficiently and spend less time doing boring, tedious tasks.

Earlier: [The Rage-Inducing Word Versus WordPerfect Debate](#)

Jeff Bennion is a solo practitioner from San Diego. When not handling his own cases, he’s consulting lawyers on how to [use technology to not be boring in trial](#) or managing e-discovery projects in mass torts/complex litigation cases. If you want to be disappointed in a lack of posts, you can follow him on [Twitter](#) or on [Facebook](#). If you have any ideas of things you want him to cover, email Jeff at jeff@trial.technology.

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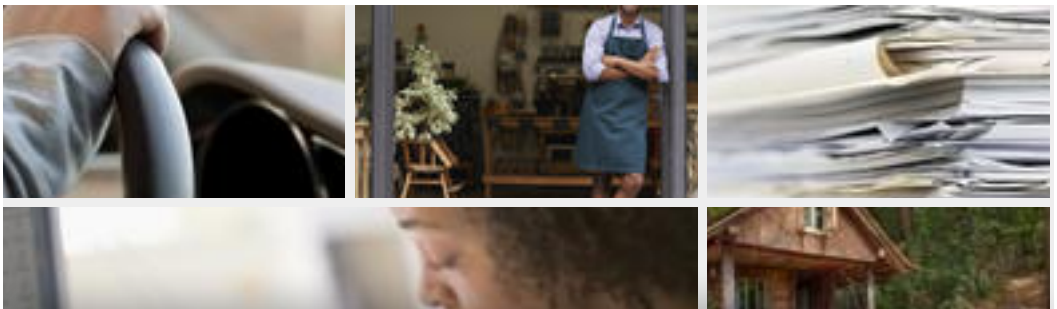


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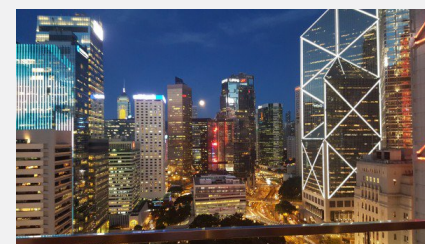
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It has long been the case in Hong Kong that most UK law firms and a very small minority of US law firms have three month notice periods for their US associates built into their employment contracts. But until about 18 months ago it was not common for any firm to enforce a three month notice period when a US associate left solo[...]

EVAN JOWERS AND ROBERT KINNEY



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Trust Women- Join Change Makers, Get Inspired and Take Action

The Trust Women conference is an influential gathering that brings together global corporations, lawyers and pioneers in the field of women's rights. Unlike many other events, Trust Women delegates take action and forge tangible commitments to empower women to know and defend their rights.

This year, the Trust Women conference will take place 17-18 November in London. On the agenda this year: how to clean supply chains of forced labour, the use of data to fight slavery, the importance of girls’ education and women under extremist rule. **For more information, visit www.trustwomenconf.com**



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Special Report: Regulation A + Flies In Blue Sky

This summer, the new SEC Regulation A+ went into effect, substantially increasing access to capital markets for smaller companies. Our friends at Wolters Kluwer Law & Business have produced a new report, Regulation A + Flies In Blue Sky, a handy primer outlining the implications of this potentially game changing new rule. The report is available for download [here](#).

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