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WSSFC 2026

Technology Track – Session 1

Excel for Lawyers: Smarter Spreadsheets with Help from AI

Presented By:

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About the Presenters...

Jeffrey S. Krause is part of Affinity's document management team. He specializes in corporate legal department deployments and workflow design and efficiency. Jeff practiced law for two years after finishing law school in 1996, but decided technology was a better path for him. He began working for a pioneering legal technology consultancy called MicroLaw in 1998. In 2003, Jeff started his own legal technology consultancy, which he ran until 2016, when he joined Affinity. Jeff's superpower is patience, and his favorite part of his job is the satisfaction of helping someone solve one of their business problems.

Bryan Sims is a shareholder and founder of Sims Law Firm, Ltd., where he concentrates his practice in the areas of commercial litigation, civil appeals, and real estate matters. He's a member of the Illinois Bar and the Northern District of Illinois Trial Bar and is also admitted to practice before the United States Supreme Court, the United State Court of Appeals for the Seventh Circuit, the United States courts in the Central District of Illinois, the Southern District of Illinois, and the Eastern District of Michigan. Bryan is a member of the Illinois State Bar Association, the American Bar Association, the DuPage County Bar Association, and the Will County Bar Association as well as a member of the ISBA Standing Committee on Legal Technology, where he has previously served as the chair three times and the newsletter editor for 5 years. Since 2006, he has been a member ISBA Solo and Small Firm Conference Planning Committee. He is a past chair of the DuPage County Bar Association Law Practice Management and Technology Committee. Bryan has spoken on legal technology issues at the ISBA Solo and Small Firm Conferences, Wisconsin Solo and Small Firm Conferences, for the DuPage County Bar Association, the Chicago Bar Association, the Winnebago County Bar Association, the Lake County (Indiana) Bar Association, the Lake County (Illinois) Bar Association, the International Technology Law Association, National Business Institute and at ABA Techshow. Also, he was the featured speaker at the 2014 Oklahoma Solo and Small Firm Conference. Bryan has contributed to TechnoLawyer and was recognized as the 2005 TechnoLawyer of the Year. He has also written for PDA JD and regularly wrote reviews for Law Office Computing. Bryan blogs about the intersection between law and technology at www.theconnectedlawyer.com. Before entering private practice, Bryan worked as a judicial law clerk for Illinois Supreme Court Justice S. Louis Rathje. He has also worked as a staff attorney for the Second District of the Illinois Appellate Court. He is a 1993 Cum Laude graduate of Wheeling University and a 1996 Magna Cum Laude graduate of Loyola University Chicago School of Law. While in law school, Bryan served on the staff of both the Loyola Law Journal and the Loyola Consumer Law Reporter.

EXCEL FOR LAWYERS: SMARTER SPREADSHEETS WITH HELP FROM AI

Written Program Materials

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Sample workbook used throughout: Excel Power Tips for Legal Users.xlsx

About Your Presenters

Jeffrey S. Krause

Jeffrey S. Krause is a Wisconsin attorney and a senior consultant with Affinity Consulting Group where he is a member of the Strategy team. He has spent more than twenty-five years assisting legal organizations of all types and sizes choose the right technology and use it the right way.

Jeff writes and speaks on a variety of topics related to legal technology and efficiency. He is a long-time planning committee member and a past chair of the Wisconsin Solo and Small Firm Conference and the Milwaukee Bar Association Law and Technology Conference.

In 2024, the State Bar of Wisconsin honored him with the John Lederer Service Award, which celebrates lawyers focused on improving the lives and practices of solo and small firm attorneys. In bestowing this award, the bar recognizes Jeff as exemplifying the leadership, spirit, and dedication of attorney John Lederer, who saw it as his mission to help solo and small firm lawyers master the skills and technology needed to build their practices.

Bryan M. Sims

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Program Description

Excel remains one of the most powerful, and often underused, tools in law practice. This program looks at practical spreadsheet uses for law firms — tracking, analysis, and reporting — and at how artificial intelligence, specifically Microsoft Copilot in Excel, can assist with formulas, data cleanup, and insights, without requiring attorneys or staff to become spreadsheet experts. All examples are drawn from a single sample workbook and demonstrated live during the program.

Learning Objectives

By the end of this program, attendees should be able to:

- Format a worksheet so numbers, dates, and headers are legible to a client, a court, or opposing counsel.
- Build formulas rather than typing calculated numbers, so totals update automatically when the underlying facts change.
- Distinguish relative from absolute cell references and diagnose the most common cause of a broken copied formula.
- Build a running total, sort data safely, and set up a worksheet to print as a usable exhibit.
- Convert a data range into a structured Table and use Subtotals and the SUBTOTAL function to summarize categorized data.
- Identify where Microsoft Copilot in Excel can reasonably assist with each of the above, and what to verify before relying on its output.

About the Sample Workbook

All live demonstrations in this program use a single workbook, Excel Power Tips for Legal Users.xlsx, provided to attendees as a companion to these written materials. The workbook contains eight tabs, one per topic, in the order covered in this outline. Each tab is deliberately left in a “before” state — with a formula or format still missing — so the calculation or feature can be built live rather than simply displayed as a finished answer. The underlying numbers are drawn from realistic legal fact patterns: a medical-bill summary, a real estate closing statement, attorney billable hours, and a probate estate inventory — the same categories of documents you already work with, whether your own matters use these exact figures.

Session Outline

The program follows the eight workbook tabs in order, closing with a dedicated discussion of Copilot in Excel and how it maps back to each topic.

#	Topic	Workbook Tab	Real-World Document Type
1	Formatting a Worksheet	Formatting	Medical bill summary
2	Formulas	Formulas	Real estate closing statement
3	Totals	Totals	Attorney billable hours
4	Relative Cell References	Relative References	Billable-rate discount schedule
5	Running Totals & Sorting	Running Totals	Disbursement / running ledger
6	Printing	Printing	Amortization schedule
7	Tables (Ctrl+T)	Tables	Billable-rate reporting table
8	Subtotals, Grand Totals & Filtering	Subtotals	Fiduciary / probate estate accounting

Session Topics

1. Formatting a Worksheet

Workbook tab: “Formatting”

Every worksheet you hand to a client, a court, or opposing counsel is judged first on whether it is legible. The Formatting tab walks through a short medical-bill summary for a fictional client, John A. Doe, with dates that display as a row of pound signs (###) because the column is too narrow, and a dollar-amount column stored as plain numbers rather than currency. We fix both live: widen the columns, apply a currency number format to the Amount column, confirm the Date of Service column is formatted as an actual date rather than text, and bold the header row so the table reads clearly at a glance.

From a tracking-and-reporting standpoint, this is the baseline: a spreadsheet that a partner, a client, or a judge can read in five seconds is doing its job. It is also one of the more reliable Copilot prompts — “format this table” generally works well — though every AI-applied format should still be checked against the underlying data before the file goes out the door.

FORMATTING A WORKSHEET				
Medical Bills for John A. Doe				
Service	Date of			Running
Provider	Service	Description	Amount	Total
Riverside Hospital	April 23, 1997	Cast broken leg	831.99	831.99
Riverside Hospital	April 23, 1997	X-ray of right wrist and	542	1373.99
James Physical Therapy C	June 30, 1997	Physical therapy treatme	250	1623.99
James Physical Therapy C	July 28, 1997	Physical therapy treatme	250	1873.99
James Physical Therapy C	August 30, 1997	Physical therapy treatme	250	2123.99
James Physical Therapy C	September 27, 1997	Physical therapy treatme	250	2373.99

HOW CAN COPILOT HELP? — Prompt idea: “Format this table — currency for Amount, date format for Date of Service, bold the header row.”

2. Formulas

Workbook tab: “Formulas”

The Formulas tab uses a sample real estate closing statement —with a list of fees, credits, and prorations that need to be totaled. Rather than looking at a finished document, several of the total cells are intentionally left blank (and highlighted) so we can build the SUM formulas live: totaling the seller’s reductions, and separately totaling the buyer’s loan fees, title fees, and credits. We also insert a =TODAY() formula for the closing date and discuss the tradeoff — TODAY() recalculates every time the file is opened, which is convenient while a deal is still moving but can be the wrong choice for a document you want to freeze once it is signed. In that case, paste the calculated date as a value instead.

The larger point of this section is a mindset shift: a typed number is a fact frozen at the moment you typed it; a formula is a live relationship between numbers that updates itself when the underlying figures change. Every tracking, analysis, or reporting spreadsheet in a law practice — trust ledgers,

cost summaries, settlement calculations — should be built on formulas, not on hand-calculated totals retyped into cells.

CLOSING STATEMENT						
ESTIMATED SETTLEMENT STATEMENT						
SELLER:				Sally Seller		
SELLER'S ATTORNEY:				Barron K. Henley, Esq.		
BUYER:				Billy Buyer		
PROPERTY:				123 Maple St., Columbus, OH 43215		
PLACE OF CLOSING:				High Premium Title, 500 E. Town St., Columbu		
DATE OF CLOSING:				###		
SELLER'S STATEMENT						
	Gross Amount Due Seller:					
	Purchase price					$395,000.00
	Reductions in Amount Due Seller:					
	Payoff Bank One mortgage					$78,522.33
	Deed preparation					$35.00
	Real Estate Tax Credit					$1,667.00
	Rent pro-ration to Donrey					$3,583.78
	Owner's Title Insurance policy					$1,585.00
	Title search					$150.00
	Title insurance commitment					$50.00
	Closing Fee					$35.00
	Transfer Tax					$395.00
	Recording fee - satisfaction of mortgage					$16.00
	Fed Ex fee - payoff to Bank One					$15.50
		Total Reductions:				

HOW CAN COPILOT HELP? — Prompt idea: “What formula totals the Reductions section, and can you build it for me?” Let Copilot draft the formula, then check it against the source numbers before relying on it.

3. Totals

Workbook tab: “Totals”

This tab tracks two months of billable hours for five attorneys. It is deliberately built with on-sheet prompts — Type to Add, Sum Function, Copy Formula, Fill Handle. All of these methods can be used to total a series of numbers and we will cover each as examples. You can select a column of hours plus one blank cell below it, use AutoSum (the Σ button, or Alt+=) to total the column, and then use the fill handle — the small square at the bottom-right corner of a selected cell — to copy that total formula across to the next column instead of retyping it. We do the same across a row to get a per-attorney total.

For reporting purposes, this is the pattern behind almost every monthly or quarterly rollup a firm produces, and it is also where Copilot in Excel can save real time: asking it to “add a total row and total column to this data” accomplishes the same result in one step. Either approach is fine once you understand why it works — knowing the fill handle means you are never dependent on having Copilot available.

	COLUMN AND ROW TOTALS				
	January Billable Hou	February Billable Hours			
Barron	124.3	173.9		Type to Add	
John	90.0	152.5		Click Cells to Add	
Jeff	200.5	199.0		Sum Function	
Brian	156.2	203.2		Copy Formula	
Adam	225.1	126.8		Fill Handle	
				Fill Handle	
	AutoSum	Fill Handle			

HOW CAN COPILOT HELP? — Prompt idea: “Add a total row and a total column to this table.”

4. Relative Cell References

Workbook tab: “Relative References”

This is, in our experience, the single highest-value five minutes of the entire session. The tab applies a firm-wide 10% non-profit discount to five different billable rates. Written one way — with a relative reference to the discount cell — the formula breaks the moment it is copied to the next row, because the reference shifts along with it and starts pointing at an empty cell. Written correctly, with an absolute reference (a dollar sign locking both the column and the row, as in C3), the same formula copies cleanly down all five rows.

We build it both ways, live, so the room can see the difference rather than take our word for it, and we show the F4 keyboard shortcut, which cycles a cell reference through relative, absolute, and the two mixed forms while you are editing a formula. This single concept — relative versus absolute references — is the most common cause of “why is my copied formula giving me the wrong number” in real practice. It is also a strong Copilot use case: pasting a formula that is producing an unexpected result and asking why is one of the more reliable diagnostic prompts, because Copilot is generally good at spotting a reference that did not lock where it needed to.

RELATIVE CELL REFERENCES		
	Non Profit Discount	10%
Billable Rate / Hour	Discounted Amount	
$125.00		
$150.00		
$200.00		
$250.00		
$300.00		

HOW CAN COPILOT HELP? — Prompt idea: “I copied this formula down and the numbers are wrong — why?”

5. Running Totals & Sorting

Workbook tab: “Running Totals”

Using the same style of medical-bill data as the Formatting tab, this section builds a running (cumulative) total column — each row’s total is the current charge plus the running total from the row above — using a mixed reference so the formula copies correctly down the column. We then sort the data, by provider or by date, and check whether the running total still makes sense afterward. It generally will only if the data is read in date order; sorting a cumulative-total column by a different field, like provider name, produces a technically correct but practically meaningless number, and that distinction is worth making explicit to the room.

This pattern is the spreadsheet version of a disbursement schedule or running ledger: every payment or transaction, with a balance that updates line by line. As with running totals generally, the safer long-term practice — covered in Topic 7 — is to convert the range to a real Table before sorting, since a Table keeps formulas and formatting intact automatically as rows move.

RUNNING TOTALS & SORTING				
Medical Bill Summary for John A. Doe				
Service Provider	**Date of Service**	**Description**	**Amount**	**Running Total**
Riverside Hospital	04/23/97	X-ray	$ 542.00	
Riverside Hospital	04/23/97	Cast broken leg	$ 831.99	
James Physical Therapy Clinic	06/30/97	Physical therapy treatment	$ 250.00	
James Physical Therapy Clinic	07/28/97	Physical therapy treatment	$ 767.00	
James Physical Therapy Clinic	08/30/97	Physical therapy treatment	$ 250.00	
James Physical Therapy Clinic	09/27/97	Physical therapy treatment	$ 250.00	
Dr. John Roberts	10/03/97	Follow up visit	$ 325.50	

HOW CAN COPILOT HELP? — Prompt idea: “Add a running total column, then sort this by date.” Re-open the formula bar after any AI-driven sort to confirm nothing silently shifted.

6. Printing

Workbook tab: “Printing”

The Printing tab is a 30-year, 360-row amortization schedule, and it exists to make one point vividly: printed as-is, this sheet runs to dozens of pages, with column headers only on the first one. We fix it with three settings under Page Layout — Print Area, to define exactly what prints; Print Titles, to repeat the Interest / Principal / Payment / Remaining Balance header row on every printed page; and Scale to Fit, to keep every column on the page width instead of splitting across sheets.

This is squarely a “know the menu” skill rather than something AI assists with — Copilot in Excel does not control print setup — but it is one of the more consequential skills in this session for anyone who assembles exhibit binders, settlement packages, or discovery productions. Five minutes of setup here is the difference between a printout the other side can actually use and one that lands on their desk unreadable.

AMORTIZATION SCHEDULE				
Term in Years				30
Number of Payments Per Year				12
Number of Payments				360
Principal Amount of Loan				$ 325,000.00
Interest Rate				2.99%
Payment				$1,368.46
				Remaining
	Interest	**Principal**	**Payment**	**Balance**
1	$809.79	$558.67	$1,368.46	$324,441.33
2	$808.40	$560.06	$1,368.46	$323,881.27
3	$807.00	$561.46	$1,368.46	$323,319.81
4	$805.61	$562.86	$1,368.46	$322,756.96
5	$804.20	$564.26	$1,368.46	$322,192.70
6	$802.80	$565.66	$1,368.46	$321,627.03
7	$801.39	$567.07	$1,368.46	$321,059.96
8	$799.97	$568.49	$1,368.46	$320,491.47
9	$798.56	$569.90	$1,368.46	$319,921.57

HOW CAN COPILOT HELP? — Not a Copilot task. Use Page Layout > Print Titles / Print Area directly.

7. Tables (Ctrl+T)

Workbook tab: “Tables”

This tab holds a lawyer billable-rate table with hourly rates, billable hours, and a Billables column that is already calculated with a formula. We convert the range to a real Table with Ctrl+T, then add a new lawyer as a new row directly beneath the table and watch Excel automatically extend both the formula and the formatting into the new row — no copying required. We also turn on the Total Row, which adds a one-click Sum, Average, or Count to the bottom of any column.

We treat this as the pivot point of the session: everything before it — formatting, formulas, totals, references, running totals — becomes easier and more reliable once the data lives in a real Table rather than a plain range, and everything after it, including Copilot, works better on a Table too. If there is one habit, we want attendees to leave with, it is this one: press Ctrl+T on a data range before you do anything else to it.

CTRL + T TABLES					
LAWYER	HOURLY RA	BILLABLE HOURS	BILLABLES -	BILLABLE HOURS	BILLABLES - 2
Barron Henley	$ 500.00	2,543	$ 1,271,500.00	2,873	$ 1,436,500.00
John Federico	$ 450.00	2,810	$ 1,264,500.00	2,421	$ 1,089,450.00
Jeff Schoenberger	$ 400.00	1,700	$ 680,000.00	1,839	$ 735,600.00
Danielle DavisRoe	$ 400.00	1,954	$ 781,600.00	1,802	$ 720,800.00
Adam Ringel	$ 350.00	1,632	$ 571,200.00	1,543	$ 540,050.00
Cyara Hotopp	$ 225.00	1,201	$ 270,225.00	0	$ -
ASSET	TYPE	FMV	LOAN	EQUITY	
1234 Oak Street, Columb	real estate	250,000	175,000		
2013 Honda Accord	tangible	8,000	6,750		
2015 Jayco Camper	tangible	6,500	4,500		
85 shares of stock	intangible	551	0		
Savings bond	intangible	2,000	0		
4573 Maple Street, Toled	real estate	$175,000.00	$150,000.00		
85 shares of stock	intangible	$551.00	$0.00		
2015 Jayco Camper	tangible	$6,500.00	$4,500.00		
85 shares of stock	intangible	$680.00	$0.00		
furniture	tangible	$1,000	$0.00		

HOW CAN COPILOT HELP? — The single biggest tip for anyone who wants AI help in Excel: Copilot works far more reliably on data that is already a real Table. Converting your range with Ctrl+T first is the best thing you can do before asking Copilot anything.

8. Subtotals, Grand Totals & Filtering

Workbook tab: “Subtotals”

The final tab is a probate estate asset inventory — the same structural pattern as a fiduciary or trust accounting: a long list of assets, each tagged by type (tangible, intangible, real estate), that needs category subtotals and a grand total. Using Data > Subtotal (after first sorting by Type), Excel groups and subtotals the list automatically, with outline symbols on the left that let you collapse the view down to just the subtotal and grand-total lines.

We also cover the SUBTOTAL function directly, and the reason it exists alongside SUM: SUBTOTAL ignores rows that are hidden by a filter, while a plain SUM formula keeps adding them anyway. For any categorized asset list, expense report, or accounting that gets filtered for review, that distinction matters. This is also a solid Copilot prompt: “subtotal this list by Type and show me the category totals and a grand total” is the kind of request Copilot handles well as a first pass. We recommend verifying the category totals against Data > Subtotal before relying on them in anything that goes to a client or a court.

GRAND TOTALS, SUBTOTALS, FILTERING			
PROBATE COURT OF FRANKLIN COUNTY, OHIO			
ESTATE OF JOHN A. DOE, DECEASED			
Case Number 41242232			
		Property	
	Description	Type	Value
	1 lot of miscellaneous personal property	tangible	$ 1,000.00
	100 shares Limited, Inc., cert. #NY147323 CUSIP #532716 10 7	intangible	$ 1,700.00
	10183 shares Gov't Securities Income Fund cert.#E0531376, CUSIP #383743 61 4	intangible	$ 5,001.00
	1309.00 shares Franklin U.S. Government Securities Fund account #10157431015	intangible	$ 9,084.46
	1985 Buick LaSabre	tangible	$ 1,500.00
	243.165 shares Sentinel Common Stock Fund Account #239297136	intangible	$ 7,997.70
	500 shares Putnam High Yield Trust-A cert. #115359, CUSIP #746782 10 1	intangible	$ 4,999.99
	627.353 shares Van Kampen U.S. Govt.-B Account #8000518297	tangible	$ 9,322.47
	715 shares Dean Witter U.S. Government Securities Trust account #648-020748	intangible	$ 6,549.40
	78 shares I.C.H. Corp. cert. #NB12718 CUSIP #449264 10 0	intangible	$ 1.25
	797.225 shares Paine Webber Global Inc. A, Account #00000139696	intangible	$ 8,275.20
	8 units Van Kampen Insured Municipals Income Trust Series 107, cert. #107 0014377	intangible	$ 501.76
	80 shares Holovision Systems, Inc.	intangible	$ 2,560.00
	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

HOW CAN COPILOT HELP? — Prompt idea: "Subtotal this list by Type and show me the category totals and a grand total."

AI in Excel: Working with Copilot

What Copilot in Excel Is

Copilot in Excel is a chat pane built into the Excel ribbon that can read the data on your worksheet and respond to plain-English requests: writing or explaining a formula, applying formatting, building a Table, summarizing a range, or answering a question about the numbers in front of you. It sits alongside — not instead of — every skill covered in this outline; the two work together.

What It Requires

Copilot in Excel requires a Microsoft 365 Copilot license, which at the time of this writing is a separate add-on from most standard Microsoft 365 plans; confirm current licensing and availability with your IT provider, since Microsoft's Copilot offerings continue to evolve. Copilot also performs meaningfully better on data that is already organized as a real Excel Table (Topic 7) with clear, single-row headers, rather than on a loosely formatted range.

Where It Helps Most (and Where It Doesn't)

Based on the eight topics in this outline, Copilot tends to help most with applying formatting from a plain-English description, drafting a first version of a formula, adding total rows or running totals to a table, diagnosing why a copied formula produced an unexpected number, and subtotaling or summarizing categorized data. It is not a substitute for the Print Titles / Print Area setup in Topic 6, which remains a manual, menu-driven task, and it is not a substitute for understanding why a formula works — that understanding is what makes it possible to catch Copilot's mistakes.

Verifying AI Output

Treat every AI-generated formula, total, or summary as a draft, not a finished answer. Spot-check totals against the source numbers, re-open the formula bar to see exactly what Copilot built and be especially alert after any AI-driven sort or restructuring of your data — confirm that formulas still reference what you expect them to. The professional obligation to review a client's numbers does not change because a tool, rather than a person, produced the first draft.

Professional Responsibility Considerations

Two considerations are worth flagging for a legal audience, independent of the jurisdiction-specific rules your own bar may have adopted:

Confidentiality — Check your firm's AI and confidentiality policy before pasting privileged or otherwise sensitive client data into any AI tool, including Copilot in Excel. Many firms have — or are developing — specific policies addressing what may and may not be entered into AI tools, and where that data is processed and retained.

Competence & Supervision — Most states have adopted some form of the duty of technology competence associated with ABA Model Rule 1.1, Comment 8. Using an AI tool does not relax the underlying duty to supervise the work product and verify its accuracy before relying on it in client

matters. This outline does not constitute legal advice on your jurisdiction's specific rules; confirm current guidance with your own bar.

Copilot in Action: Mapping to the Session Topics

Topic	Example Copilot Prompt
Formatting	"Format this table — currency for Amount, date format for Date of Service, bold the headers."
Formulas	"What formula totals this section, and can you build it for me?"
Totals	"Add a total row and total column to this table."
Relative References	"I copied this formula down and the result looks wrong — why?"
Running Totals	"Add a running total column," then verify after any sort.
Printing	Not a Copilot task — use Page Layout > Print Titles / Print Area.
Tables	"Convert this range to a Table and turn on the Total Row."
Subtotals	"Subtotal this list by Type and show category totals and a grand total."

Key Takeaways

- Convert data to a real Table (Ctrl+T) before doing anything else — everything else in this outline, including Copilot, works better on structured data.
- Formulas, not typed numbers — every time. A formula updates when the facts change; a typed number never does.
- Know your $ before you copy a formula. Relative versus absolute references are the leading cause of real-world spreadsheet errors.
- Printing is a five-minute setup, not an afterthought — Print Titles and Print Area protect every exhibit binder and settlement package you build.
- Copilot accelerates; it does not replace. Verify every AI-generated formula, total, or summary against the source data, and check your firm's confidentiality policy before using client data with any AI tool.

Appendix A: Quick Reference — Functions & Shortcuts Used Today

Concept	What It Does	How to Use It
SUM()	Adds a range of cells	=SUM(range), or Alt+= for AutoSum
Fill Handle	Copies a formula across cells	Drag the small square at the bottom-right of a selected cell
$ (Absolute Reference)	Locks a reference so it doesn't shift when copied	Add $ before the column/row, or press F4 while editing a formula
TODAY()	Inserts today's date; recalculates on open	=TODAY()
Ctrl+T	Converts a range into a structured Table	Select the range, press Ctrl+T
Total Row	Adds Sum / Average / Count to a Table	Table Design tab > Total Row
SUBTOTAL()	Totals only visible (unfiltered) rows	=SUBTOTAL(9, range) for a sum
Data > Subtotal	Groups and subtotals a sorted list automatically	Sort by category first, then Data > Subtotal
Print Titles	Repeats header rows on every printed page	Page Layout > Print Titles
Print Area	Defines exactly what prints	Page Layout > Print Area > Set Print Area

Appendix B: Sample Workbook Tab Index

Excel Power Tips for Legal Users.xlsx — provided as a companion file to these written materials.

Tab Name	Skill Covered	Real-World Example
Formatting	Number formats, column width, header styling	Medical bill summary
Formulas	Building SUM formulas, TODAY()	Real estate closing statement
Totals	AutoSum, fill handle	Attorney billable hours
Relative References	Relative vs. absolute references	Billable-rate discount schedule
Running Totals	Cumulative totals, sorting	Disbursement / running ledger
Printing	Print Area, Print Titles, scaling	Amortization schedule
Tables	Ctrl+T, structured references, Total Row	Billable-rate reporting table
Subtotals	Data > Subtotal, SUBTOTAL()	Fiduciary / probate estate accounting