

Excel for Litsupport:
Tips and Tricks to Excel at Excel
May 20, 2009
Target Litigation Consulting, Inc.

Our jobs are about data. We're often asked by clients to sort, combine, collate and coordinate large amounts of data. We'd like to teach you how do some data acrobatics using the most common tool available to everyone with a desk: Microsoft Excel.

Today we will be covering the following the following topics:

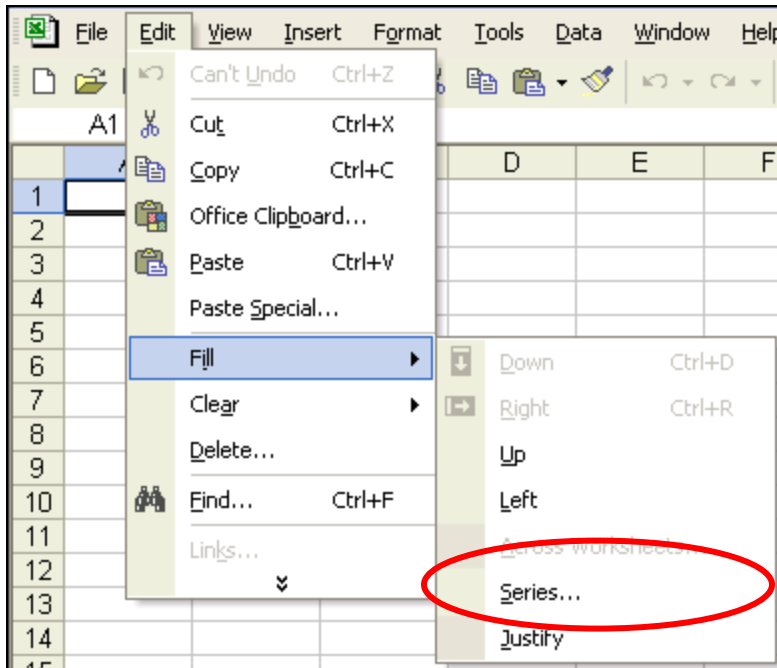
1. Fill Series
2. Custom Formatting
3. Text to Columns
4. Paste Special
5. Basic Formulas
6. Text formulas
7. Autofilter

Please don't hesitate to ask any questions that come up.

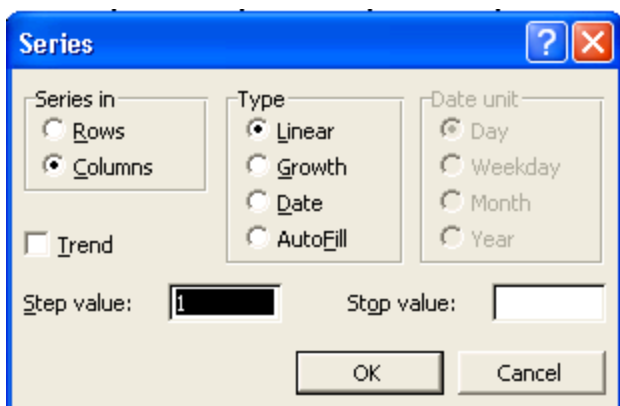
I. Fill Series

The Fill function allows you to add data to a large number of rows in one action. The Fill Series option is the most useful for litigation support, as it allows you to autonumber down a row or across a column in Excel.

Fill Series can be opened by going to Edit>Fill>Series...



Which brings up the following screen:

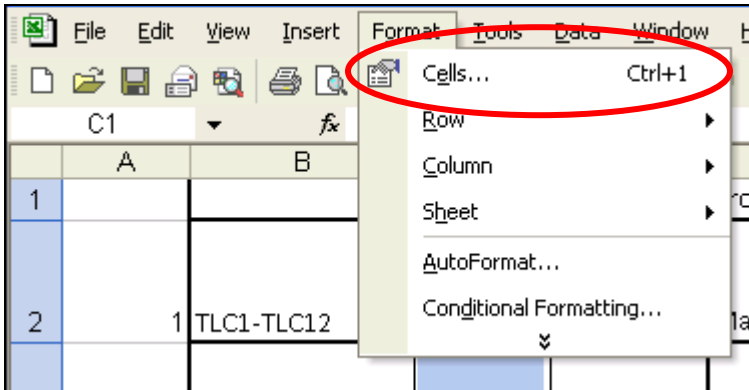


Generally, you will want to keep the standard settings, but you can also use this to fill in dates or numbers in increments other than 1.

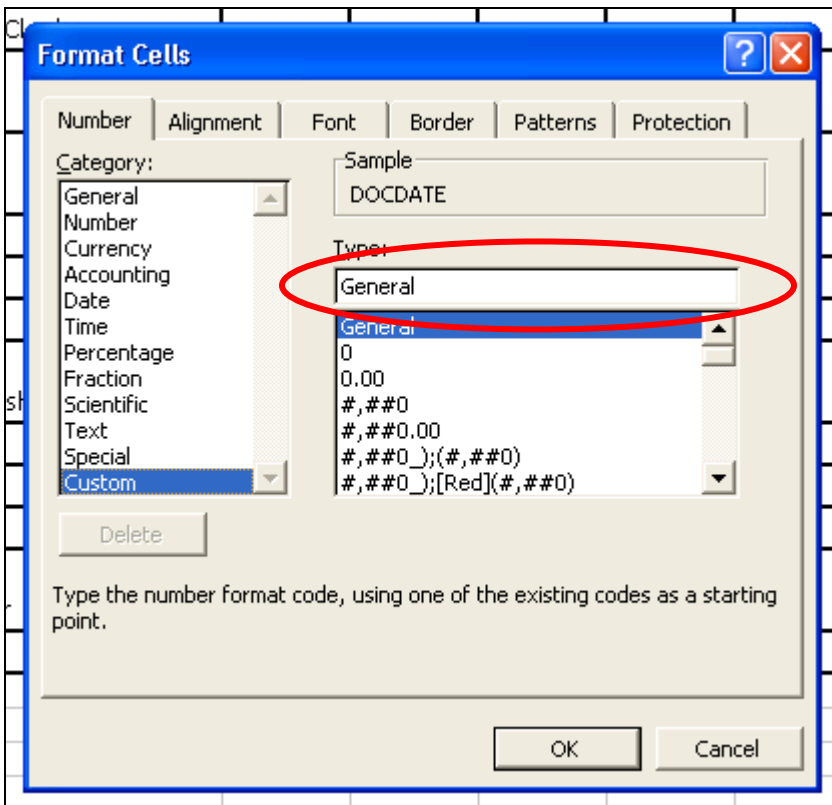
2. Custom Formatting

Formatting in Excel is important, as the default formats are typically not useful in litigation support. For example, you often do not want to lose leading zeroes, which Excel automatically drops unless told otherwise. Similarly, by default Excel formats dates a certain way, but you may want to use padded dates (01/01/2009). You can create your own formatting options for situations like these.

To set up custom formatting, select the cells you wish to format and select Format>Cells...



Which brings up the following window:



If you select “Custom” as pictured above, you can type a custom format into the circled field using the following variables:

- M Month
- D Day
- Y Year
- # Number

This is also an excellent way to put in Bates numbers. For example, putting in:

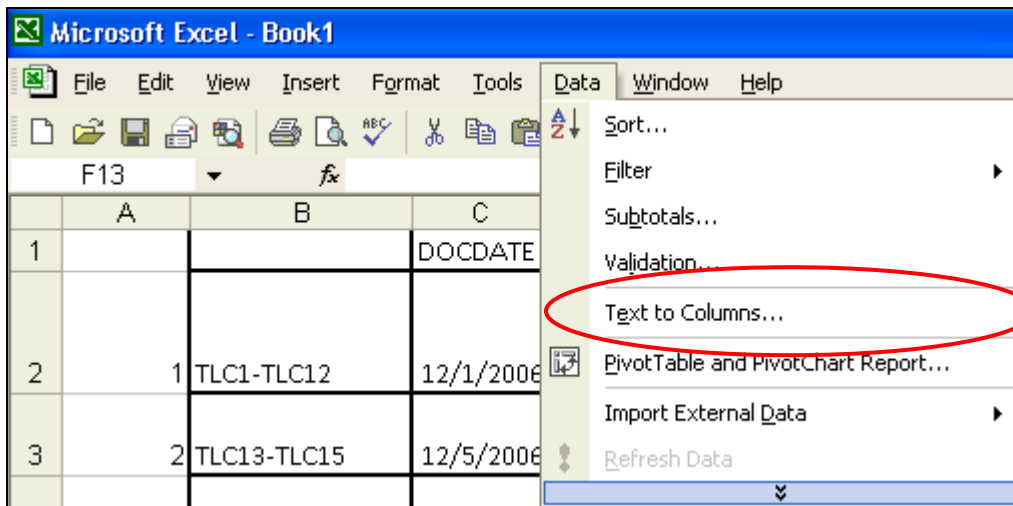
“TLC”000000

Will give you Bates numbers with the TLC prefix, padded to 6 digits (TLC000001).

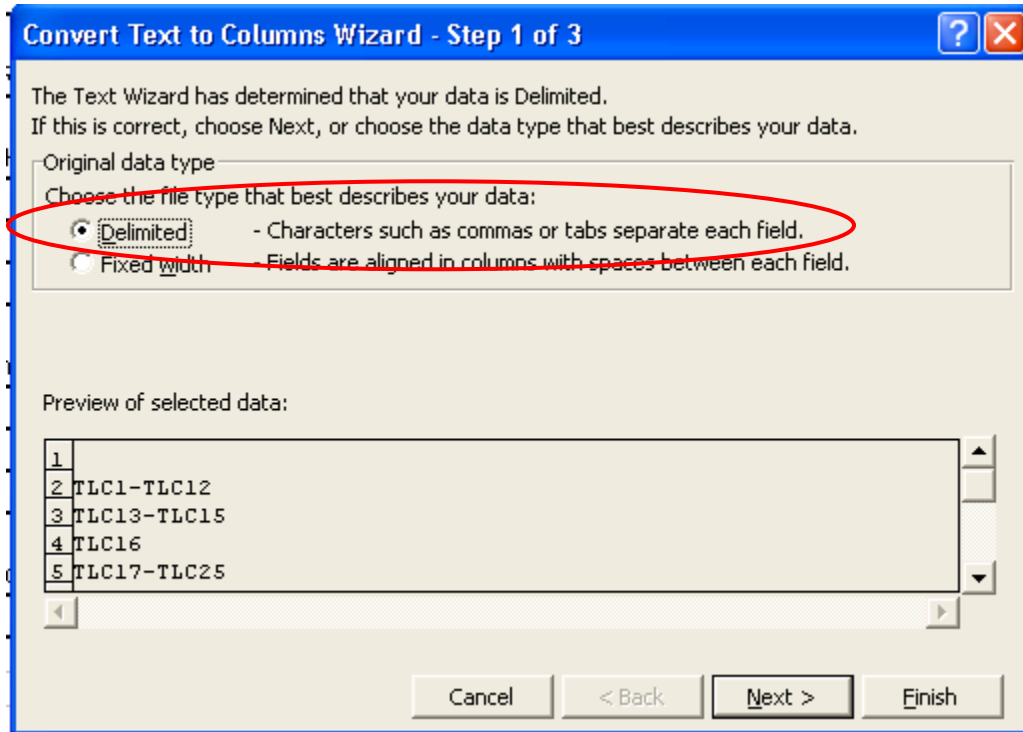
3. Text to Columns

Text to Columns is a function that allows you to take text in one column and spread it into multiple columns based on delimiters such as comma, space, or dash. Begin by selecting the cells that contain the text you want to spread to different columns.

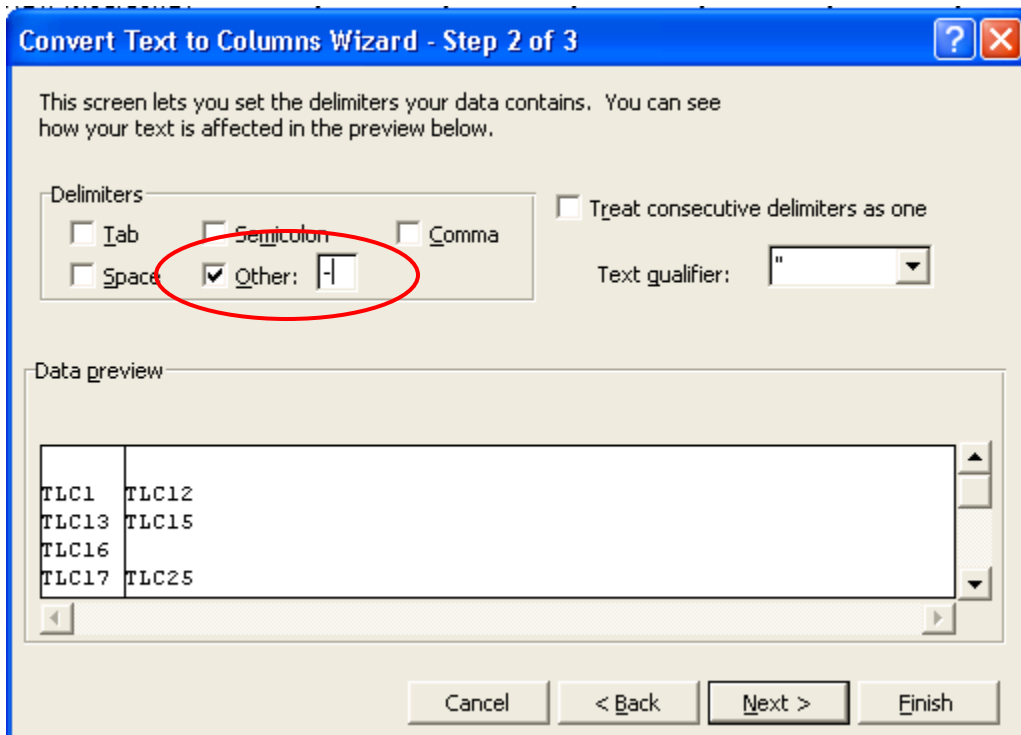
You can access the Text to Columns function under Data>Text to Columns...



This will open the Text to Columns wizard:



In our example, we want to split the beginning and end documents on the dash, so we will select “delimited” and then “next.”



In order to split the column on the dash we will select "Other:" and type in a dash. The preview pane underneath will show you if the split is working the way you intend. For our purposes, you can now click Finish.

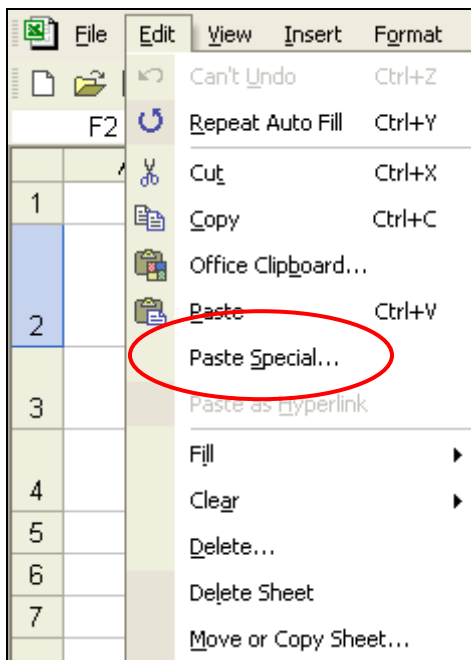
You have now split the data from one column into two.

4. Paste Special

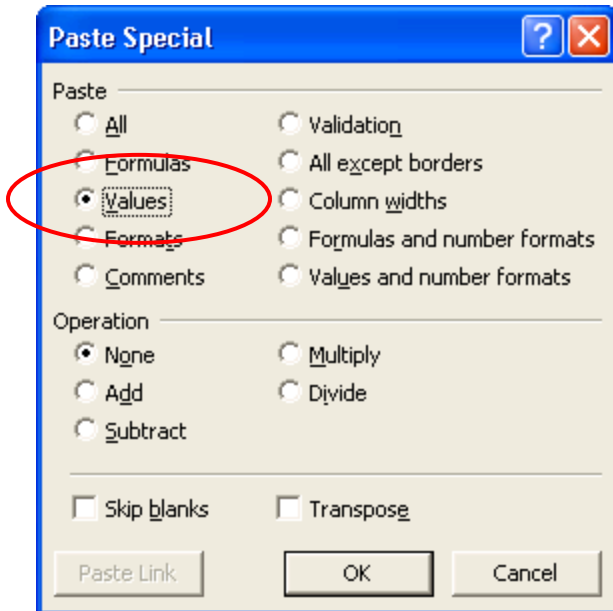
Paste Special allows you to copy data in the specific manner or format you want. For example, you may want to copy the results of a calculation (as opposed to the calculation itself), or copy data without any formatting.

In this example, we will use Paste Special to copy the results of calculations into a new field, where they will be sortable.

Select the text or cells you want to copy within your spreadsheet and hit Ctrl+C or go to Edit>Copy to copy the text or cells. Then select the cell or cells you want to paste that information into and go to Edit>Paste Special:



That brings up the Paste Special menu:



In this case, we're going to paste the Values (that is, the results of calculations). This lets you copy cells which hold formulas, but paste only the results into a new cell.

These other options are relatively self-explanatory now that you know how to get to this menu.

6. Basic Formulas

- a. Average: Finds the average of a number of cells (i.e., `AVERAGE(B1,B2,B3)` or `AVERAGE(B1:B9)` to average a series or range of cells)
- b. Sum: Adds up the value of the listed cells or performs a mathematical calculation (i.e., `SUM(B1,B2,B3)` or `SUM(B1:B9)` to add up a series or range of cells; `SUM(G6-G10)` to subtract the value of G10 from G6, etc.)
- c. Count: Counts the number of non-empty cells in a selection (i.e., `COUNT(X14:X900)` will count the number of non-empty cells in that range of cells)

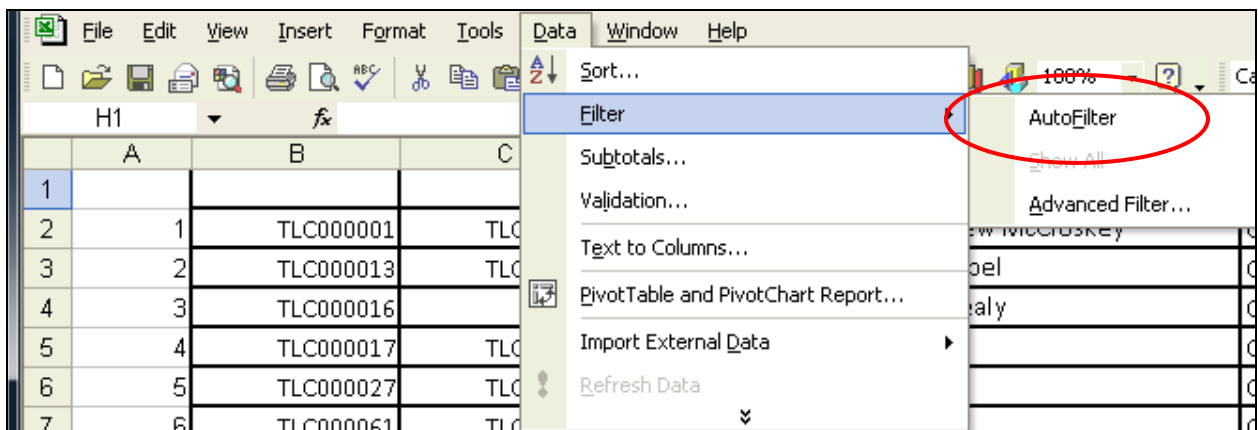
7. Text Formulas

Text formulas allow you to perform automated actions on a range of cells containing text (as opposed to formulas). In litigation support, this is commonly useful when dealing with paths.

- a. Left/right: Allows you to delete a number of characters at the beginning (left) or the end (right) of a string of text (generally a cell reference)
=LEFT(<text>,<Number of Characters to Keep>)
=RIGHT(<text>,<Number of First Character to Keep>)
- b. Mid: Allows you to take a specified chunk of text out of a larger string
=MID(<text>, <First Character to Keep>, <Number of Characters to Keep>)
- c. Concatenate: Allows you to combine text from multiple columns into one column
=CONCATENATE(<text1>,"TEXT",<text2>)
- d. If/Then: Allows you to create a conditional cell.
=IF(<test>, <Value to return if true>,<Value to return if false>)

8. Autofilter

Using Autofilter allows the user to quickly filter and manage data in a user friendly manner. It also ensures that your data is all sorted at the same time.



The Autofilter automatically creates a list of each unique entry in a field and allows you to choose any one of them to filter by.

| | A | B | C | D | E | F | G | H | I | J | K |
|----|----|-----------|-----------|-----------|-------------|-------------------|-------|---|---|---|---|
| 1 | | | | DOCDA | Type | From | | | | | |
| 2 | 1 | TLC000001 | TLC000012 | 12/1/2007 | (All) | Matthew McCloskey | OK | | | | |
| 3 | 2 | TLC000013 | TLC000015 | 12/5/2007 | (Top 10...) | Jon Rubel | OK | | | | |
| 4 | 3 | TLC000016 | | 1/1/2008 | (Custom...) | Ben Healy | CHECK | | | | |
| 5 | 4 | TLC000017 | TLC000025 | | Addendum | | CHECK | | | | |
| 6 | 5 | TLC000027 | TLC000060 | | Attachment | | CHECK | | | | |
| 7 | 6 | TLC000061 | TLC000070 | | Contract | | CHECK | | | | |
| 8 | 7 | TLC000072 | | 5/20/2007 | Email | Adam Standish | CHECK | | | | |
| 9 | 8 | TLC000073 | TLC000115 | | Fax Cover | | OK | | | | |
| 10 | 9 | TLC000116 | TLC000184 | | Letter | | CHECK | | | | |
| 11 | 10 | TLC001185 | TLC001279 | | (Blanks) | | CHECK | | | | |
| 12 | 11 | TLC001281 | | 5/30/2007 | (NonBlanks) | David Yunker | CHECK | | | | |
| 13 | 12 | TLC001282 | TLC002178 | | Attachment | | CHECK | | | | |

By clicking the arrow button next to “Type” in the example above, we can see the dropdown for that field. The dropdown will be different for different types of data.