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**MASTERING EXCEL  
MADE EASY™ FOR  
LAWYERS**

**TEACHUCOMP, INC.®**

*...it's all about you*

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# INTRODUCTION AND OVERVIEW

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Welcome to TeachUcomp, Inc.'s Mastering Excel Made Easy™ for Lawyers tutorial. This tutorial introduces the student to Microsoft Excel, a popular spreadsheet program. This tutorial gives the student with little or no knowledge of Excel a firm skills base using Excel.

Excel is an excellent program to learn, as the skills you learn also apply to many other programs. Understanding Excel is helpful before learning about more complicated data-storage and manipulation programs, like Access or other relational database software.

Excel is a multi-featured spreadsheet software in which you create powerful worksheets that manipulate numbers in columns and rows for you. It is a very powerful program and has many advanced features that can automate and simplify your work. Whether you want it to create charts, worksheets, or data sources, Excel can help you accomplish your tasks quickly and easily.

This tutorial starts by teaching the student basic Excel skills like creating and formatting worksheets and inserting formulas. It then teaches the student enhanced skills like creating and formatting charts, using advanced data tools, and creating tables. Then the student learns advanced Excel skills like creating and managing data models, PivotTables and PivotCharts, and much more! Finally, the student then applies that knowledge to tasks that are common when using Excel in the legal profession.

# TABLE OF CONTENTS

<u>Chapters/Lessons:</u>	<u>Page(s):</u>	<u>Chapters/Lessons:</u>	<u>Page(s):</u>
<b>CHAPTER 1- Getting Acquainted with Excel</b>	<b>7</b>	<b>CHAPTER 5- Copying and Pasting Formulas</b>	<b>59</b>
1.1- About Excel	8	5.1- Relative References and Absolute References	60
1.2- The Excel Environment	9	5.2- Cutting, Copying, and Pasting Data	60-61
1.3- The Title Bar	10	5.3- AutoFilling Cells	61
1.4- The Ribbon	10	5.4- The Undo Button	61
1.5- The "File" Tab and Backstage View	11	5.5- The Redo Button	62
1.6- Scroll Bars	11	<i>Copying &amp; Pasting Formulas- Actions</i>	<i>63-64</i>
1.7- The Quick Access Toolbar	12	<b><i>Copying &amp; Pasting Formulas- Exercises</i></b>	<b>65</b>
1.8- Touch Mode	12-13	<b>CHAPTER 6- Columns and Rows</b>	<b>66</b>
1.9- The Formula Bar	13	6.1- Selecting Columns and Rows	67
1.10- The Workbook Window	13	6.2- Adjusting Column Width and Row Height	67-68
1.11- The Status Bar	14	6.3- Hiding and Unhiding Columns and Rows	68
1.12- The Workbook View Buttons	14	6.4- Inserting and Deleting Columns and Rows	68-69
1.13- The Zoom Slider	14-15	<i>Columns &amp; Rows- Actions</i>	<i>70-71</i>
1.14- The Mini Toolbar	15	<b><i>Columns &amp; Rows- Exercises</i></b>	<b>72</b>
1.15- Keyboard Shortcuts	15	<b>CHAPTER 7- Formatting Worksheets</b>	<b>73</b>
<i>Getting Acquainted with Excel- Actions</i>	<i>16-20</i>	7.1- Formatting Cells	74
<b><i>Getting Acquainted with Excel- Exercises</i></b>	<b>21</b>	7.2- The Format Cells Dialog Box	74-75
<b>CHAPTER 2- File Management</b>	<b>22</b>	7.3- Clearing All Formatting from Cells	76
2.1- Creating New Workbooks	23	7.4- Copying All Formatting from Cells to Another Area	76
2.2- Saving Workbooks	23-24	<i>Formatting Worksheets- Actions</i>	<i>77</i>
2.3- Closing Workbooks	24	<b><i>Formatting Worksheets- Exercises</i></b>	<b>78</b>
2.4- Opening Workbooks	24-25	<b>CHAPTER 8- Worksheet Tools</b>	<b>79</b>
2.5- Recovering Unsaved Workbooks	25	8.1- Inserting and Deleting Worksheets	80
2.6- Opening a Workbook in a New Window	26	8.2- Selecting Multiple Worksheets	80
2.7- Arranging Open Workbook Windows	26	8.3- Navigating Worksheets	80
2.8- Freeze Panes	26	8.4- Renaming Worksheets	81
2.9- Split Panes	27	8.5- Coloring Worksheet Tabs	81
2.10- Hiding and Unhiding Workbook Windows	27	8.6- Copying or Moving Worksheets	81
2.11- Comparing Open Workbooks	27	<i>Worksheet Tools- Actions</i>	<i>82-83</i>
2.12- Switching Open Workbooks	28	<b><i>Worksheet Tools- Exercises</i></b>	<b>84</b>
2.13- Switching to Full Screen Mode	28	<b>CHAPTER 9- Setting Worksheet Layout</b>	<b>85</b>
2.14- Working with Excel File Formats	28-29	9.1- Using Page Break Preview	86
2.15- AutoSave Online Workbooks	29	9.2- Using the Page Layout View	86
<i>File Management- Actions</i>	<i>30-36</i>	9.3- Opening the Page Setup Dialog Box	86
<b><i>File Management- Exercises</i></b>	<b>37</b>	9.4- Page Settings	86-87
<b>CHAPTER 3- Data Entry</b>	<b>38</b>	9.5- Setting Margins	87
3.1- Selecting Cells	39	9.6- Creating Headers and Footers	87-88
3.2- Entering Text into Cells	40	9.7- Sheet Settings	88
3.3- Entering Numbers into Cells	41	<i>Setting Worksheet Layout- Actions</i>	<i>89-91</i>
3.4- AutoComplete	42	<b><i>Setting Worksheet Layout- Exercises</i></b>	<b>92</b>
3.5- Pick from Drop-Down List	42	<b>CHAPTER 10- Printing Worksheets</b>	<b>93</b>
3.6- Flash Fill	42-43	10.1- Previewing and Printing Worksheets	94
3.7- Selecting Ranges	43-44	<i>Printing Worksheets- Actions</i>	<i>95</i>
3.8- Ranged Data Entry	44	<b><i>Printing Worksheets- Exercises</i></b>	<b>96</b>
3.9- Using AutoFill	44-45	<b>CHAPTER 11- Helping Yourself</b>	<b>97</b>
<i>Data Entry- Actions</i>	<i>46-48</i>	11.1- Using Excel Help	98
<b><i>Data Entry- Exercises</i></b>	<b>49</b>	11.2- Microsoft Search in Excel	98
<b>CHAPTER 4- Creating Formulas</b>	<b>50</b>	11.3- Smart Lookup	99
4.1- Ranged Formula Syntax	51	<i>Helping Yourself- Actions</i>	<i>100-101</i>
4.2- Simple Formula Syntax	51	<b><i>Helping Yourself- Exercises</i></b>	<b>102</b>
4.3- Writing Formulas	52	<b>CHAPTER 12- 3D Formulas</b>	<b>103</b>
4.4- Using AutoSum	53	12.1- Creating 3D Formulas	104
4.5- Inserting Functions	53-54	12.2- 3D Formula Syntax	104
4.6- Editing a Range	54	12.3- Creating 3D Range References	104
4.7- Formula AutoCorrect	54	<i>3D Formulas- Actions</i>	<i>105</i>
4.8- AutoCalculate	54-55		
4.9- Function Compatibility	55		
<i>Creating Formulas- Actions</i>	<i>56-57</i>		
<b><i>Creating Formulas- Exercises</i></b>	<b>58</b>		

# TABLE OF CONTENTS

<u>Chapters/Lessons:</u>	<u>Page(s):</u>	<u>Chapters/Lessons:</u>	<u>Page(s):</u>
<b>3D Formulas- Exercises</b>	<b>106</b>	20.3- Inserting Records and Fields	168
<b>CHAPTER 13- Named Ranges</b>	<b>107</b>	20.4- Deleting Records and Fields	168
13.1- Naming Ranges	108	<i>Tables- Actions</i>	169-170
13.2- Creating Names from Headings	108	<b>Tables- Exercises</b>	<b>171</b>
13.3- Moving to a Named Range	109	<b>CHAPTER 21- Sorting Data</b>	<b>172</b>
13.4- Using Named Ranges in Formulas	109	21.1- Sorting Data	173
13.5- Naming 3D Ranges	109	21.2- Custom Sort Orders	173-174
13.6- Deleting Named Ranges	110	<i>Sorting Data- Actions</i>	175-176
<i>Named Ranges- Actions</i>	111-113	<b>Sorting Data- Exercises</b>	<b>177</b>
<b>Named Ranges- Exercises</b>	<b>114</b>	<b>CHAPTER 22- Filtering Data</b>	<b>178</b>
<b>CHAPTER 14- Conditional Formatting and Cell Styles</b>	<b>115</b>	22.1- Using AutoFilters	179
14.1- Conditional Formatting	116	22.2- Using the Top 10 AutoFilter	179
14.2- Finding Cells with Conditional Formatting	117	22.3- Applying a Custom AutoFilter	180
14.3- Clearing Conditional Formatting	117	22.4- Creating Advanced Filters	180-181
14.4- Using Table and Cell Styles	117	22.5- Applying Multiple Criteria	181
<i>Conditional Formatting and Cell Styles- Actions</i>	118-119	22.6- Using Complex Criteria	182
<b>Conditional Formatting and Cell Styles- Exercises</b>	<b>120</b>	22.7- Copying Filter Results to a New Location	182
<b>CHAPTER 15- Paste Special</b>	<b>121</b>	22.8- Using Database Functions	183
15.1- Using Paste Special	122-123	<i>Filtering Data- Actions</i>	184-187
15.2- Pasting Links	123	<b>Filtering Data- Exercises</b>	<b>188</b>
<i>Paste Special- Actions</i>	124	<b>CHAPTER 23- What-If Analysis and Forecasts</b>	<b>189</b>
<b>Paste Special- Exercises</b>	<b>125</b>	23.1- Using Data Tables	190
<b>CHAPTER 16- Sharing Workbooks</b>	<b>126</b>	23.2- Using Scenario Manager	191-192
16.1- About Co-authoring and Sharing Workbooks	127	23.3- Using Goal Seek	192
16.2- Co-authoring Workbooks	127-128	23.4- Forecast Sheets	193
16.3- Adding Shared Workbook Buttons in Excel	128-129	<i>What-If Analysis and Forecasts- Actions</i>	194-196
16.4- Traditional Workbook Sharing	130	<b>What-If Analysis and Forecasts- Exercises</b>	<b>197</b>
16.5- Highlighting Changes	131	<b>CHAPTER 24- Table-Related Functions</b>	<b>198</b>
16.6- Reviewing Changes	131	24.1- The Hlookup and Vlookup Functions	199
16.7- Using Comments and Notes	132-134	24.2- Using the IF, AND, and OR Functions	200
16.8- Compare and Merge Workbooks	134	24.3- The IFS Function	201
<i>Sharing Workbooks- Actions</i>	135-143	<i>Table-Related Functions- Actions</i>	202
<b>Sharing Workbooks- Exercises</b>	<b>144</b>	<b>Table-Related Functions- Exercises</b>	<b>203</b>
<b>CHAPTER 17- Auditing Worksheets</b>	<b>145</b>	<b>CHAPTER 25- Sparklines</b>	<b>204</b>
17.1- Auditing Worksheets	146	25.1- Inserting and Deleting Sparklines	205
17.2- Tracing Precedent and Dependent Cells	146	25.2- Modifying Sparklines	205-206
17.3- Tracing Errors	147	<i>Sparklines- Actions</i>	207-208
17.4- Error Checking	147	<b>Sparklines- Exercises</b>	<b>209</b>
17.5- Using the Watch Window	148	<b>CHAPTER 26- Creating Charts in Excel</b>	<b>210</b>
17.6- Cell Validation	148-149	26.1- Creating Charts	211
<i>Auditing Worksheets- Actions</i>	150-153	26.2- Selecting Charts and Chart Elements	212
<b>Auditing Worksheets- Exercises</b>	<b>154</b>	26.3- Adding Chart Elements	213
<b>CHAPTER 18- Outlining Worksheets</b>	<b>155</b>	26.4- Moving and Resizing Charts	214
18.1- Using Outlines	156	26.5- Changing the Chart Type	214
18.2- Applying and Removing Outlines	156	26.6- Changing the Data Range	215-216
18.3- Applying Subtotals	156-157	26.7- Switching Column and Row Data	216
<i>Outlining Worksheets- Actions</i>	158-159	26.8- Choosing a Chart Layout	216
<b>Outlining Worksheets- Exercises</b>	<b>160</b>	26.9- Choosing a Chart Style	216
<b>CHAPTER 19- Consolidating Worksheets</b>	<b>161</b>	26.10- Changing Color Schemes	217
19.1- Consolidating Data	162-163	26.11- Printing Charts	217
<i>Consolidating Worksheets- Actions</i>	164	26.12- Deleting Charts	217
<b>Consolidating Worksheets- Exercises</b>	<b>165</b>	<i>Creating Charts In Excel- Actions</i>	218-223
<b>CHAPTER 20- Tables</b>	<b>166</b>	<b>Creating Charts In Excel- Exercises</b>	<b>224</b>
20.1- Creating a Table	167	<b>CHAPTER 27- Formatting Charts in Excel</b>	<b>225</b>
20.2- Adding and Editing Records	168	27.1- Formatting Chart Objects	226
		27.2- Inserting Objects into a Chart	226-227

# TABLE OF CONTENTS

<u>Chapters/Lessons:</u>	<u>Page(s):</u>	<u>Chapters/Lessons:</u>	<u>Page(s):</u>
27.3- Formatting Axes	228	31.11- Inserting 3D Map Objects	304
27.4- Formatting Axis Titles	228	31.12- Previewing a Scene	305
27.5- Formatting a Chart Title	229	31.13- Playing a 3D Maps Tour	305-306
27.6- Formatting Data Labels	229	31.14- Creating a Video of a 3D Maps Tour	306
27.7- Formatting a Data Table	230	31.15- 3D Maps Options	306
27.8- Formatting Error Bars	230	<i>3D Maps- Actions</i>	307-319
27.9- Formatting Gridlines	231	<b>3D Maps- Exercises</b>	<b>320</b>
27.10- Formatting a Legend	231		
27.11- Formatting Drop and High-Low Lines	231-232	<b>CHAPTER 32- Slicers and Timelines</b>	<b>321</b>
27.12- Formatting Trendlines	232	32.1- Inserting and Deleting Slicers	322
27.13- Formatting Up/Down Bars	232	32.2- Modifying Slicers	322
27.14- Formatting the Chart and Plot Areas	233	32.3- Inserting and Deleting Timelines	323
27.15- Naming Charts	233	32.4- Modifying Timelines	323
27.16- Applying Shape Styles	233	<i>Slicers and Timelines- Actions</i>	324-326
27.17- Applying WordArt Styles	234	<b>Slicers and Timelines- Exercises</b>	<b>327</b>
27.18- Saving Custom Chart Templates	234		
<i>Formatting Charts in Excel- Actions</i>	235-244	<b>CHAPTER 33- Security Features</b>	<b>328</b>
<b>Formatting Charts in Excel- Exercises</b>	<b>245</b>	33.1- Unlocking Cells	329
		33.2- Worksheet Protection	330
<b>CHAPTER 28- Data Models</b>	<b>246</b>	33.3- Workbook Protection	330
28.1- Creating a Data Model from External Relational Data	247-248	33.4- Password Protecting Excel Files	331
28.2- Creating a Data Model from Excel Tables	248-249	<i>Security Features- Actions</i>	332-334
28.3- Enabling Legacy Data Connections	249	<b>Security Features- Exercises</b>	<b>335</b>
28.4- Relating Tables in a Data Model	249-250		
28.5- Managing a Data Model	251	<b>CHAPTER 34- Making Macros</b>	<b>336</b>
<i>Data Models- Actions</i>	252-256	34.1- Recording Macros	337
<b>Data Models- Exercises</b>	<b>257-259</b>	34.2- Running and Deleting Recorded Macros	338
		34.3- The Personal Macro Workbook	338
<b>CHAPTER 29- PivotTables and PivotCharts</b>	<b>260</b>	<i>Making Macros- Actions</i>	339-340
29.1- Creating Recommended PivotTables	261-262	<b>Making Macros- Exercises</b>	<b>341</b>
29.2- Manually Creating a PivotTable	262-263		
29.3- Creating a PivotChart	264-265	<b>CHAPTER 35- Using Online Templates</b>	<b>342</b>
29.4- Manipulating a PivotTable or PivotChart	265-266	35.1- Downloading Online Templates	343
29.5- Changing Calculated Value Fields	266	35.2- Saving a Template	343
29.6- Formatting PivotTables	266-267	35.3- Creating New Workbooks from Saved Templates	344
29.7- Formatting PivotCharts	267	<i>Using Online Templates- Actions</i>	345
29.8- Setting PivotTable Options	267	<b>Using Online Templates- Exercises</b>	<b>346</b>
29.9- Sorting and Filtering Using Field Headers	267-268		
<i>PivotTables and PivotCharts- Actions</i>	269-277	<b>CHAPTER 36- Legal Templates</b>	<b>347</b>
<b>PivotTables and PivotCharts- Exercises</b>	<b>278-279</b>	36.1- Chapter Overview	348
		36.2- Using the Law Firm Financial Analysis Worksheet	348-349
<b>CHAPTER 30- Power Pivot</b>	<b>280</b>	36.3- Using the Law Firm Project Tracker	349-350
30.1- Starting Power Pivot	281	36.4- Using the Law Firm Project Plan	350
30.2- Managing the Data Model	281	<i>Legal Templates- Actions</i>	351-353
30.3- Calculated Columns	282	<b>Legal Templates- Exercises</b>	<b>354-355</b>
30.4- Measures	283		
30.5- Creating KPIs	284	<b>CHAPTER 37- Legal Business Functions</b>	<b>356</b>
30.6- Creating and Managing Perspectives	285	37.1- The Pv Function	357
30.7- Power Pivot PivotTables and PivotCharts	286	37.2- The Fv Function	358
<i>PowerPivot- Actions</i>	287-291	37.3- The IRR and XIRR Functions	359
<b>PowerPivot- Exercises</b>	<b>292-2994</b>	<i>Legal Business Functions- Actions</i>	360
		<b>Legal Business Functions- Exercises</b>	<b>361</b>
<b>CHAPTER 31- 3D Maps</b>	<b>295</b>		
31.1- Enabling 3D Maps	296	<b>CHAPTER 38- Simple IOLTA Management</b>	<b>362</b>
31.2- Creating a New 3D Maps Tour	296-297	38.1- IOLTA Basics	363
31.3- Editing a 3D Maps Tour	297-298	38.2- Using Excel for Simple IOLTA Management	363
31.4- Managing Layers in a 3D Maps Tour	298	38.3- Using the Simple IOLTA Template	364
31.5- Filtering Layers	298-299	<i>Simple IOLTA Management- Actions</i>	365
31.6- Setting Layer Options	299-300	<b>Simple IOLTA Management- Exercises</b>	<b>366-367</b>
31.7- Managing Scenes	301		
31.8- Custom 3D Maps	302	<b>Keyboard Shortcuts</b>	<b>368-371</b>
31.9- Custom Regions	303		
31.10- World Map Options	304		

# **CHAPTER 35-**

## **USING ONLINE TEMPLATES**

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**35.1- DOWNLOADING ONLINE TEMPLATES**

**35.2- SAVING A TEMPLATE**

**35.2- CREATING NEW WORKBOOKS FROM SAVED TEMPLATES**

Sample - for evaluation purposes only!

# USING ONLINE TEMPLATES

## **35.1- Downloading Online Templates:**

Microsoft Excel lets you download online templates if you are using Microsoft Excel on an internet-connected computer. There are many templates available for legal professionals that allow you to manage and record time, record consulting on projects, and many other useful things. In this lesson we will examine how you can search for online templates that you can download and save to your computer for use within your law firm.

First open Microsoft Excel. If viewing the “Home” startup screen, then click the “New” button at the left side of the screen. Alternatively, if you already have a workbook opened, then instead click the “File” tab within the Ribbon. Then click the “New” command at the left side of the backstage view.

Doing either activity then displays the available templates in the area to the right. There are thousands of templates available for your Microsoft Office products, so you must search for the types of templates to use. To do this, click into the search box at the top of the list of templates and then type a keyword of your choosing into the search box. Then click the “Start searching” button at the right end of the search box or press the “Enter” key on your keyboard to display the results of the template search in the area below the search box.

To download a template, simply click it once to select it. You will see a description of the template appear. If you decide that you would like to download this template, then click the “Create” button to download and create a copy of this template on your computer.

The template will then open within Excel, where you can edit and customize it as you wish by adding your own content to the structure provided.

## **35.2- Saving a Template:**

You can save a downloaded Excel template to the templates folder within your computer, so you won’t need to download it again later. To do this, display the template onscreen and then click the “File” tab in the Ribbon. Then click the “Save As” command at the left side of the backstage view within the template file. Then click the “Browse” button to the right to open the “Save As” dialog box.

Select either the “Excel Template” or “Excel Macro-Enabled Template” choice from the “Save as type” drop-down at the bottom of the “Save As” dialog box. The difference between the choices depends on whether or not the template contains macro coding within the file. To save a template that contains macro coding, you must use the “Excel Macro-Enabled Template” choice.

After making either selection, Excel then changes the folder to which it saves the template to the default templates folder within your computer. Be sure to save the template into this folder that Excel selects so Excel can find the template when you create a new workbook based on the template in the future. Then type the name to give to the template into the “File name” field in the “Save As” dialog box. Then click the “Save” button within the “Save As” dialog box to save the template to your computer. You can then close the template file displayed within Excel.

In the next lesson within this chapter, you will examine how to create a new Excel workbook from the template that you saved to your computer.



# USING ONLINE TEMPLATES

## **35.3- Creating New Workbooks from Saved Templates:**

In the last lesson within this chapter, you learned how to save a template to your computer. In this lesson, you will learn how to create a new workbook from the template you saved to your computer.

To create a new workbook from a saved template, open Microsoft Excel. If viewing the “Home” startup screen, then click the “New” button at the left side of the screen. Alternatively, if you already have a workbook opened, then instead click the “File” tab within the Ribbon. Then click the “New” command at the left side of the backstage view.

After performing either action, then click the “PERSONAL” category that appears by the search box above the list of templates in the area to the right to display the personal templates you have saved to your computer within Excel. These templates appear within the templates area below. You can then click the name of the template to use as the basis for your new Excel workbook to create a new copy within Excel.

You can then add your own data to the new workbook you have created and save it, as normal. Note that the changes made to the workbook do not change the original template from which the workbook was created.

# ACTIONS-

## USING ONLINE TEMPLATES

### DOWNLOADING ONLINE TEMPLATES:

1. **To download online templates**, open Microsoft Excel.
2. **If viewing the “Home” startup screen**, then click the “New” button at the left side of the screen.
3. **Alternatively**, if you already have a workbook opened, then instead click the “File” tab within the Ribbon and then click the “New” command at the left side of the backstage view.
4. Doing either activity then displays the available templates in the area to the right.
5. **To search for online templates**, click into the search box at the top of the list of templates and then type a keyword of your choosing into the search box.
6. Then click the “Start searching” button at the right end of the search box or press the “Enter” key on your keyboard to display the results of the template search in the area below the search box.
7. **To download a template**, simply click it once to select it.
8. You will then see a description of the template appear.
9. **If you want to download the template**, then click the “Create” button to download and create a copy of the template on your computer.
10. The template then opens within Excel, where you can edit and customize it as you wish by adding your own content to the structure provided.

### SAVING A TEMPLATE:

1. **To save a downloaded template**, display the template onscreen and then click the “File” tab in the Ribbon.
2. Then click the “Save As” command at the left side of the backstage view within the template file.
3. Then click the “Browse” button to the right to open the “Save As” dialog box.
4. Select either the “Excel Template” or “Excel Macro-Enabled Template” choice from the “Save as type” drop-down at the bottom of the “Save As” dialog box, as is appropriate for your current template.
5. After making either selection, Excel then changes the folder to which it saves the template to the default templates folder within your computer. Be sure to save the template into this folder that Excel selects so Excel can find the template when you create a new workbook based on the template in the future.
6. Then type the name to give to the template into the “File name” field in the “Save As” dialog box.
7. Then click the “Save” button within the “Save As” dialog box to save the template to your computer.
8. You can then close the template file displayed within Excel

### CREATING NEW WORKBOOKS FROM SAVED TEMPLATES:

1. **To create a new workbook from a saved template**, open Microsoft Excel.
2. **If viewing the “Home” startup screen**, then click the “New” button at the left side of the screen.
3. **Alternatively**, if you already have a workbook opened, then instead click the “File” tab within the Ribbon and then click the “New” command at the left side of the backstage view.
4. After performing either action, then click the “PERSONAL” category that appears by the search box above the list of templates in the area to the right to display the personal templates you have saved to your computer within Excel in the templates area below.
5. You can then click the name of the template to use as the basis for your new Excel workbook to create a new copy in Excel.
6. You can then add your own data to the new workbook you have created and save it, as normal.

# EXERCISES- USING ONLINE TEMPLATES

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## **Purpose:**

To save a template to your computer in Excel.

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## **Exercises:**

1. Open your Excel application.
2. Then open the "Law Firm Financial Analysis Worksheet" Excel template included within this tutorial. You can often click the link for the "Law Firm Financial Analysis Worksheet" Excel template in the training interface to open and/or download a copy of the template within Excel.
3. To save the template to the templates folder within your computer, ensure that the "Law Firm Financial Analysis Worksheet" Excel template is displayed onscreen within Excel.
4. Then click the "File" tab within the Ribbon.
5. Click the "Save As" command at the left side of the backstage view.
6. Then click the "Browse" button to the right to open the "Save As" dialog box.
7. Select the "Excel Template" choice from the "Save as type" drop-down at the bottom of the "Save As" dialog box.
8. When you make this selection, Excel should then change the folder to which it saves the template to the default templates folder within your computer. Be sure to save the template into this folder so Excel can find and display the template choice later when you create a new workbook based on the given template in the future.
9. Then click the "Save" button within the "Save As" dialog box to save the template to your computer.
10. You can then close the template file.