



MICROSOFT WORD

FOR LEGAL PROFESSIONALS

Covering Microsoft 365 for Windows

BY: BARRON HENLEY
JOHN FEDERICO &
DANIELLE DAVISROE



MICROSOFT WORD FOR LEGAL PROFESSIONALS

Covering Microsoft 365 for Windows

BY: BARRON HENLEY
JOHN FEDERICO &
DANIELLE DAVISROE



MICROSOFT WORD

FOR LEGAL PROFESSIONALS

Covering Microsoft 365 for Windows

BY: BARRON HENLEY
JOHN FEDERICO &
DANIELLE DAVISROE



Microsoft Word for Legal Professionals

By: Barron Henley,
John Federico, and
Danielle DavisRoe

MICROSOFT WORD

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

©2024 Affinity Consulting Group LLC

ALL RIGHTS RESERVED. No part of this work covered by the copyright herein may be reproduced or distributed in any form or by any means, except as permitted by U.S. copyright law, without the prior written permission of the copyright owner, except as may otherwise be provided below.

Microsoft and the Office logo are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. Affinity Consulting Group LLC is an independent entity from Microsoft Corporation and is not affiliated with Microsoft in any manner.

Mac users: If you are using this manual with Word for Mac, some of the steps will be different. Further, some features available in Word for Windows are not available in Word for Mac.

The materials in this book were written using Microsoft 365 and all steps and instructions were tested prior to the publication date. As Microsoft continuously updates Microsoft 365, your software experience may vary slightly from what is seen in this manual.

For training or technology assistance, contact us at Affinity Consulting Group LLC - 614.602.5561 or info@affinityconsulting.com. For permission to use materials from this text or product, submit all requests via email to info@affinityconsulting.com.

This is for your personal use only, you may not distribute, modify, or copy the materials, except for archival or backup purposes, without express permission of the copyright owner.

Version 4.01



Lawyerist
LAB®

Ready to create the law firm of your dreams?

Our small firm-focused coaching program is here to guide you on your journey to a healthy firm. Lawyerist Lab is the place for innovative, modern, and entrepreneurial small law firm owners who want to explore better ways to do law.



Build a Solid Foundation

Learn to remove roadblocks to build and streamline the strategy and systems that help your practice run smoothly.

Get Expert Guidance

Our team of expert coaches are small business owners themselves, ready to help you eliminate uncertainty and indecision, and find freedom in your firm.

Be Part of the Community

Join a robust and engaged community of like-minded small law firm owners and find the support and encouragement to help you thrive.

Visit lawyerist.com/coaching to learn more!



MEET OUR TEAM OF WORD EXPERTS

Meet our team of Word experts who have co-authored this manual.



BARRON HENLEY

Most people wouldn't relish the idea of spending a day in a conference room, teaching Microsoft Word. Barron is not most people. There are few things Barron enjoys more than teaching all-day Word training classes.

Barron has helped hundreds of organizations transition from Corel WordPerfect to Word. From training to converting documents, he does it all. Few people understand both WordPerfect and Word as well as Barron does.

As an attorney, he understands how challenging it is to practice law without the proper training on the technology tools. When Barron isn't training people on Word or helping transition organizations transition from WordPerfect, he focuses on automating documents and teaching

CLE classes for attorneys across North America.

JOHN FEDERICO

With a drive to make software bend to his will, John pushes the limits of what Word can do with custom ribbons, complex macros, and automation. His experience practicing law taught him the value of improving document drafting efficiency.

When John isn't working in Word directly, he focuses on automating complex documents with document automation software. He's passionate about creating a simple user interface, reducing the amount of data entry required to generate complex documents. Never one to back down from a challenge, John will find a way to make anything happen.



DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.





MICROSOFT WORD FOR LEGAL PROFESSIONALS

TABLE OF CONTENTS

CHAPTER 1 INTRODUCTION

Benefits of Word Processor Efficiency for Law Offices	1
Unfortunately, Practice Does Not Make Perfect	2

CHAPTER 2 MANAGING DOCUMENTS

What Is Document Management?.....	4
What Are Files and How Are They Stored?.....	4
Disk Storage	4
Folder Structures.....	5
Rules for Naming Files When Saving.....	5

CHAPTER 3 THE INTERFACE

Overview	7
Quick Access Toolbar.....	8
Contextual Ribbons.....	9
File Menu.....	9
Collapsing White Space Between Pages	11
Show Ribbon Options	12

CHAPTER 4 CURRENT FILE TYPES

Description of the Current File Types.....	13
Benefits of the Current File Types	13
Always Convert Old Files to New Format	13

CHAPTER 5 NORMAL TEMPLATE

Introduction to Templates	15
Normal Template	15

CHAPTER 6 NEW FEATURES

Dictation.....	17
Better Help	17
Text Predictions.....	18

CHAPTER 7 DEFAULT SETTING CHANGES

In General.....	19
Options ▶ General.....	19
Options ▶ Display.....	21
Options ▶ Proofing.....	22
Options ▶ Proofing and Autocorrect.....	23
Options ▶ Save.....	26
Options ▶ Advanced ▶ Editing Options.....	27
Options ▶ Advanced ▶ Cut, Copy and Paste.....	27
Options ▶ Advanced ▶ Show Document Content.....	28
Options ▶ Advanced ▶ Fidelity & General.....	29
Options ▶ Advanced ▶ Layout Options.....	29
Options ▶ Trust Center ▶ Trust Center Settings Button ▶ Protected View.....	30
Options ▶ Trust Center ▶ Trust Center Settings Button ▶ Trusted Locations.....	31
Options ▶ Trust Center ▶ Trust Center Settings Button ▶ File Block Settings.....	32
Options ▶ Trust Center ▶ Trust Center Settings Button ▶ Privacy Options.....	34
Lock In Your Setting Changes.....	34
Fix Track Changes Settings.....	34

CHAPTER 8 CUSTOMIZING WORD

Quick Access Toolbar.....	36
Problems With Word's Default Formatting.....	42
Fixing Default Formatting.....	44
Customizing the Status Bar.....	47
Turning On the Ruler.....	49
Creating Keyboard Shortcuts.....	49

CHAPTER 9 WHERE TO GET HELP WITH WORD

Options For Self Help.....	53
Call or Email Someone Who Can Help.....	54
Three Golden Rules Legal Users Need to Know.....	54

CHAPTER 10 BASICS

File Operations.....	56
Screen View Options on the View Ribbon.....	56

Viewing Two Sections of the Same Word Document Simultaneously.....59

Legal Tip - Full Screen Edit Mode 60

Print and Print Preview..... 60

Protecting Against Lockups and Document Corruption..... 60

CHAPTER 11 EDITING TOOLS

Navigating Long Documents.....62

Undo and Redo Shortcut Keys.....62

Inserting Text.....62

Selecting Text.....63

Deleting Text.....64

Copy, Cut and Paste.....64

Copying Text from Multiple Sources.....66

Legal Tip - Using Go To for Quick Navigation 68

Legal Tip - Holding Your Place in Long Documents with Virtual Bookmarks..... 68

Searching (Find).....70

Find and Replace.....72

CHAPTER 12 PROOFING

Customizing Spell and Grammar Check.....74

Spell Check.....75

AutoCorrect.....77

Grammar Check.....79

Thesaurus.....81

CHAPTER 13 FORMATTING PRINCIPLES

The Microsoft Word Approach to Formatting.....83

Reveal Formatting.....85

Format Painter.....85

Remove All Formatting.....86

CHAPTER 14 FONT FORMATTING

Applying Font Formatting 87

Lower Case, Upper Case, and More 88

Stretching Title Spacing 88

Hidden Text..... 89

Symbols..... 90

Non-Breaking Spaces and Hyphens..... 90

"Printing" Problem Actually Related to Font Selection.....91

CHAPTER 15 PARAGRAPH FORMATTING FUNDAMENTALS

Applying Paragraph Formatting.....93

What Happens when Paragraph Marks Are Deleted93

Paragraph Alignment 94

Line Spacing.....95

Spacing Between Paragraphs.....95

Holding Lines and/or Paragraphs Together 96

Automatically Start a Paragraph at the Top of a New Page 99

What to Do If You Experience Bizarre Page Breaks 99

Tabs..... 100

Indents.....105

Signature Lines.....106

Borders and Shading.....107

CHAPTER 16 PARAGRAPH NUMBERING AND BULLET POINTS

Bullets and Numbering Should Be Linked to Styles.....109

Never Use the Numbering or Bullets Buttons.....109

Single Level Bullet Points109

Single-Level Paragraph Numbering..... 112

Multi-Level Paragraph Numbering 112

CHAPTER 17 PAGE FORMATTING (SECTIONS PART 1)

Introduction to Sections and Breaks.....117

Section Formatting.....119

Legal Tip - Printing Specific Sections and Pages 123

CHAPTER 18 HEADERS, FOOTERS & PAGE NUMBERING (SECTIONS PART 2)

Header and Footer Ribbon124

Create a Header or Footer124

Our Advice on Page Numbering.....124

Page Numbers Manually Inserted into a Header or Footer..... 125

Insert the Total Number of Pages in the Document..... 125

Number All Pages Except the First..... 125

Create Page Numbering within Multi-Section Documents..... 126

Insert the Total Number of Pages in a Particular Section of the Document..... 131

Insert the Filename and Path in the Footer of Your Document..... 132

Add Filename and Path to Last Page Footer (Automatically) 133

CHAPTER 19 INTRODUCTION TO STYLES

Using These Styles Chapters..... 134

What Are Styles?..... 134

Two Formatting Approaches in Word..... 134

Advantages of Styles..... 135

Where Styles Are Stored..... 135

Rules of Styles..... 135

CHAPTER 20 APPLYING STYLES

Determining How Styles are Being Used..... 141

Finding Styles 142

Applying Styles 143

CHAPTER 21 STYLES PANE

Dock the Styles Pane..... 144

Show Style Previews..... 145

Customizing the Styles Pane..... 145

CHAPTER 22 STYLES GALLERY

Expanding the Styles Gallery..... 148

CHAPTER 23 CREATING AND MODIFYING STYLES

Types of Styles..... 150

Styles Based on Other Styles 150

Default Formatting: Normal..... 151

Modifying Existing Styles 151

Creating New Styles 152

Style for Following Paragraph 153

Styles and the Navigation Pane..... 154

Assigning Keyboard Shortcuts to Styles 154

Don't Automatically Update Styles..... 155
 Styles and Templates..... 155

CHAPTER 24 STYLES AND AUTOMATIC PARAGRAPH NUMBERING

Key to Success..... 157
 Steps For Automatically Numbering Paragraphs..... 157
 Legal Style Numbering..... 161
 Separating Numbers from Text 163

CHAPTER 25 IMPORTING STYLES

Methods of Importing Styles 164
 Quick Style Sets..... 164
 Organizer..... 165

CHAPTER 26 TABLE OF CONTENTS

Creating TOCs..... 169
 Updating the Table of Contents 175
 Formatting the Table of Contents..... 176

CHAPTER 27 TABLE OF AUTHORITIES IN PLEADINGS

In General..... 177
 Setting Up TOA Categories First..... 178
 Mark the Citations 179
 Generate a Table of Authorities Based on Your Marked Citations..... 180
 Page Number Warning..... 180
 Editing TOA Entries by Editing TOA Fields..... 181

CHAPTER 28 CROSS REFERENCES

In General..... 185
 Cross Referencing Paragraph Numbers..... 185
 Cross Referencing Page Numbers..... 188
 Cross Referencing Paragraph and Bookmarked Text..... 189
 Cross Reference Capitalization..... 189
 Updating Cross References..... 190
 Following Cross References 191
 Broken Cross References 191

CHAPTER 29 REDLINING & PROTECTING ATTORNEY WORK PRODUCT

Negotiating Documents in General.....	193
Comments.....	193
Comparing Documents Electronically.....	195
Combining Documents.....	200
Tracking Changes as you Edit.....	201
Prevent Editors from Turning Off "Track Changes".....	202
Change The Name Associated With Tracked Changes.....	203
Metadata.....	204
Protecting Confidential Documents - Legal Tip.....	205

CHAPTER 30 AUTOMATING WITH MACROS AND AUTOTEXT CLAUSE LIBRARIES

Quick Parts and AutoText.....	207
Macros.....	208
Assigning a Macro to a Quick Access Toolbar Button.....	211

CHAPTER 31 TEMPLATES IN GENERAL

Adopting Uniform Standards for Your Organization.....	212
Templates Defined.....	212
Why You Need to Use Templates.....	212
Two Basic Types of Templates.....	212
Normal Template (Default).....	213
Modify Your Normal.dotm Template.....	215
Working with Templates.....	216
Creating Templates.....	218
Using Templates.....	218
Modify a Template.....	219
Sharing Templates.....	219

CHAPTER 32 FILLABLE FORMS

Creating a Form.....	221
Form Field Descriptions and Uses.....	224
Advanced Techniques:.....	226
Complete a Form.....	231

Editing Fields 231

CHAPTER 33 MAIL MERGE

Steps In a Mail Merge 234
 Mail Merge Example..... 234

CHAPTER 34 REBUILDING DOCUMENTS

We've All Been There..... 236
 Step One - Download Our Sample Document to Work Through This Progression 236
 Step Two - Turn on Show Hide 236
 Step Three - Determine If You Need to Start with a New Document..... 236
 Step Four - Make A Copy or Create New File 237
 Step Five - Take Notes About the Formatting You Want to Replicate..... 238
 Step Six - Remove Unnecessary Characters/Keystrokes 240
 Step Seven - Wipe Out All Font and Paragraph Formatting 242
 Step Eight - Set Default Font and Paragraph Settings 242
 Step Nine - Set Margins and Other Section Settings..... 244
 Step Ten - Add Page Numbering 246
 Step Eleven - Delete Any Tables of Contents or Tables of Authority 246
 Step Twelve - Clean Up the Styles Pane 246
 Step Thirteen - Customize and Apply Styles 249
 Step Fourteen - Add Back Any Footnotes 261
 Step Fifteen - Add Paragraph Cross References 262
 Step Sixteen - Generate Tables of Contents and Authorities Properly..... 263

CHAPTER 35 ENVELOPES

Creating an Envelope..... 264
 Changing the Envelope Formatting..... 265

CHAPTER 36 ENDNOTES AND FOOTNOTES

Footnotes 266
 Endnotes..... 268
 Converting Between Endnotes and Footnotes..... 269

CHAPTER 37 TABLES

Inserting Tables 271
 Editing Tables..... 272

Formatting Tables278

Sorting Data in a Table281

Converting Text to Table282

Converting Tables to Text282

Performing Calculations.....283

CHAPTER 38 EXHIBIT NUMBERING

Auto-Numbering/Lettering Exhibits and Schedules285

Fixing The Caption Style286

Cross Referencing Exhibits and Schedules.....286

CHAPTER 39 WORKING WITH WORDPERFECT FILES

Why Word Users Need to Understand How to Handle WordPerfect Documents288

Recommend Approaches for the Occasional Need288

Converting WP Documents to Word.....289

Problems With the Foregoing Options290

Recommended Option for You.....291

Opening WP Documents in Word Errors.....291

Cleaning Up a Document Word or WP Converts.....291

Formatting Raw Text.....295

CHAPTER 40 COMMON SPEED KEYS

Speed Keys Commonly Used in Word.....296

CHAPTER 17

PAGE FORMATTING (SECTIONS PART 1)

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Introduction to Sections and Breaks

Every Word document contains at least one section. Section formatting includes formatting that doesn't apply to specific characters or paragraphs. Paper size, page orientation, margins, headers, footers, and columns are all examples of section formatting. If you need to change section formatting in the middle of a document, you need to break the document into multiple sections.

There are two types of breaks: page breaks and section breaks. Page breaks do *not* break the document into multiple sections.

Types of Page (Non-Section) Breaks

There are several types of page (non-section) breaks in Word:

- Soft Page Break**Inserted automatically when you have entered enough text to fill the page.
- (Hard) Page Break**Inserted manually (Ctrl + Enter) to force the start of a new page.
- Column Break**Forces the start of a new column (newspaper style).
- Text Wrapping Break**Ends the current line and forces the text to continue below a picture, table or other item.

Types of Section Breaks

- Next Page**Forces a hard page break and starts the new section at the top of the next page.
- Continuous**Inserts a new section in the middle of a page without forcing a hard page break. Splits the page into two sections.
- Even Page**Inserts a section break and starts the new section on the next even numbered page.
- Odd Page**Inserts a section break and starts the new section on the next odd numbered page.

Inserting Breaks

Whether you want to insert a page (non-section) or section break, go to the **Layout ribbon** → **Page Setup group** → **Breaks button**. The top half of the dropdown menu contains page (non-section) breaks and the bottom half contains section breaks. Click on the desired type of break to insert it into your document.

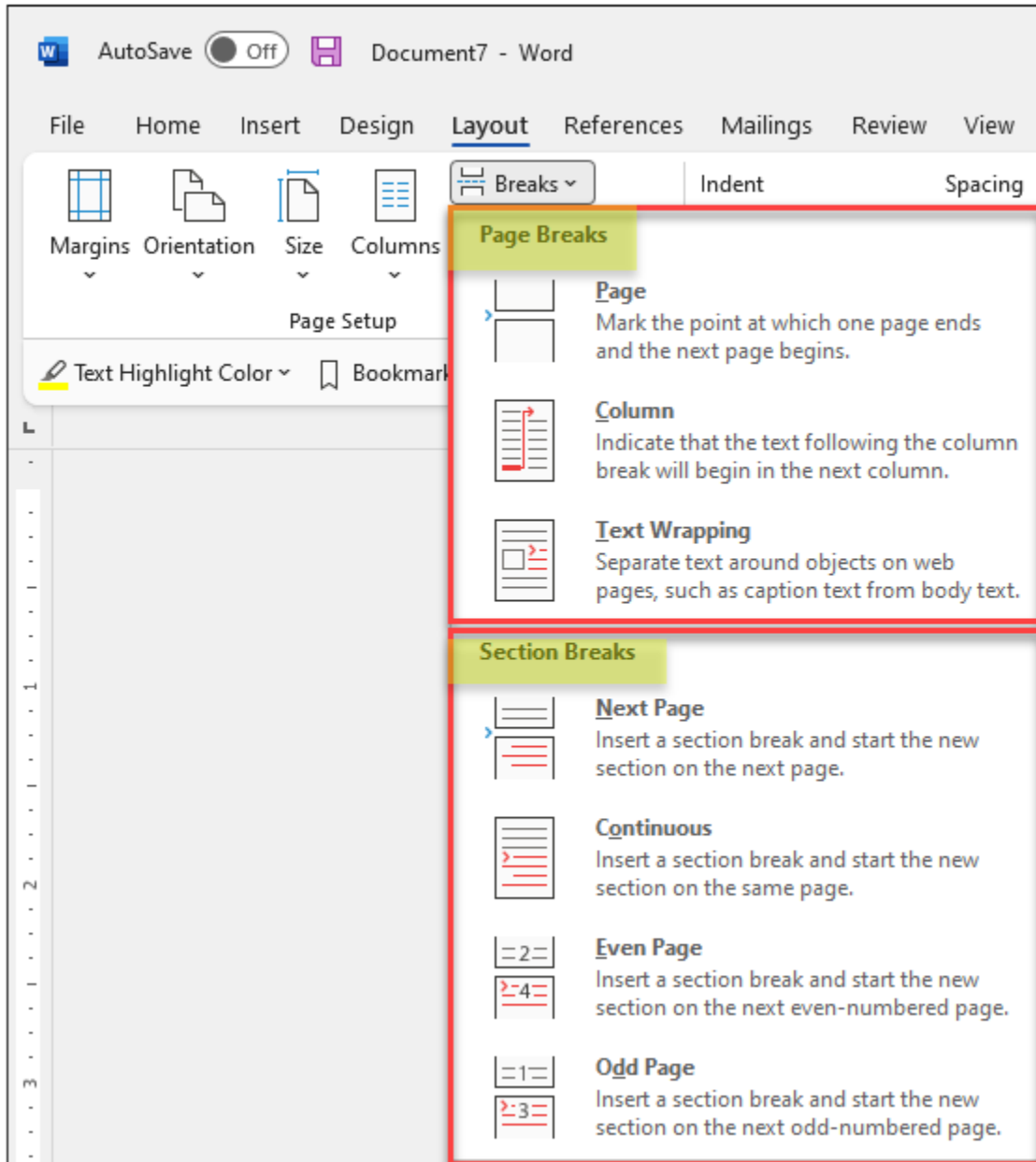


FIGURE 17-1

If your formatting marks are turned on (see page 83), you'll see the break in the document. If not, it's still there, you just won't see it.

Section Formatting

The Page Setup dialog contains the settings for document margins, paper size, orientation and paper source. Click on the **Layout ribbon** → **Page Setup launcher**. All of these settings can be applied to the current section, to the entire document (regardless of how many sections there are) or from a designated point forward.

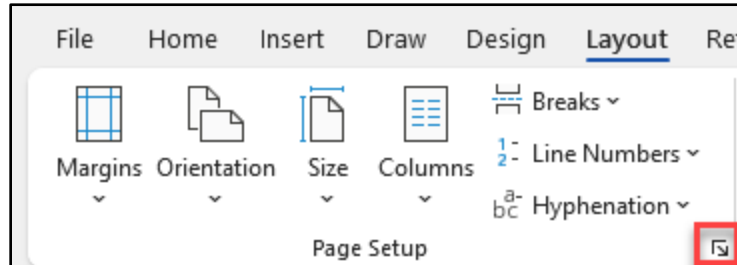


FIGURE 17-2

Margins

The margins are the distance between the edge of the page and the text on the page. The distance between the top, bottom, left, and right sides of the page can all be set independently:

1. Click the **Layout ribbon** → **Page Setup launcher** → **Margins tab**.
2. Fill in the desired margins.
3. Click **OK**.



FIGURE 17-3

Example: Different Margin for the First Page of a Document

Let's assume you want a 3" top margin for the first page and a 1" top margin for all subsequent pages. You'll need a section break to change margins in the middle of a document:

1. Place the cursor at the top of page 1 of your document.
2. Click on the **Layout ribbon** → **Page Setup launcher** → **Margins tabs**.
3. Change the top margin to 3" and click **OK**.
4. Click **Layout ribbon** → **Page Setup group** → **Breaks button** → **Section Break: Continuous**. This creates a single line section at the top of the document where your cursor is and the entire rest of the document is section 2.
5. Click the down arrow key a few times so you're into section 2. Now click the **Layout ribbon** → **Page Setup launcher** → **Margins tab**. Change the top margin for Section 2 back to 1"

and make sure **This Section** is selected in the **Apply To dropdown box**. Since the first place Word can make this margin change is the top of page 2, your margins will be correct for the balance of the document.

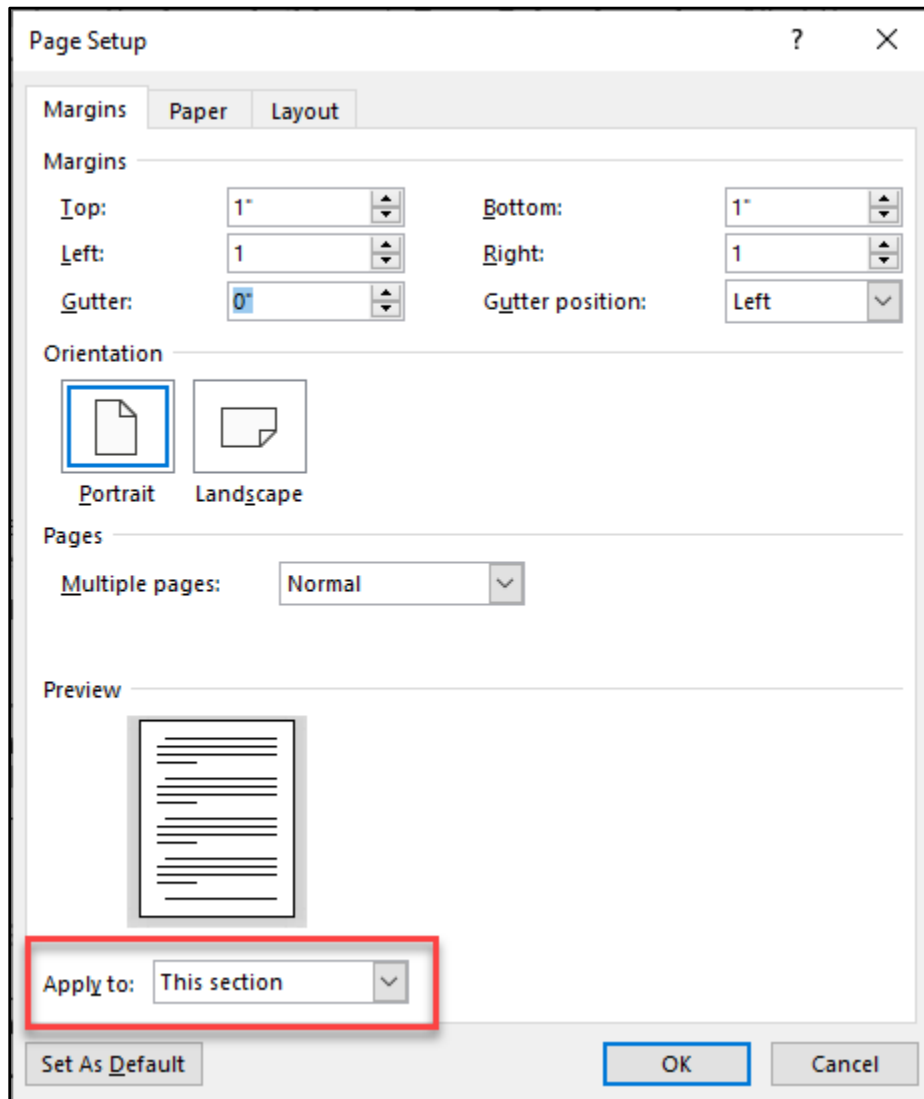


FIGURE 17-4

Orientation

If you have any exhibits (or other pages) that need to be landscape rather than portrait-oriented, you'll need to insert a section break prior to the exhibit (and after the exhibit if you have portrait-oriented pages after the exhibit). You can change orientation for a section by clicking on **Layout ribbon** → **Page Setup Group** → **Orientation button** → select **Portrait** or **Landscape**.

Change Paper Size

Click the **Layout ribbon** → **Page Setup launcher** → **Paper tab**. Select from the document types listed in the **Paper size drop down menu**, or manually choose the **Width** and **Height**. Click **OK**. You can also click on the **layout ribbon** → **Page Setup group** → **Size button**.

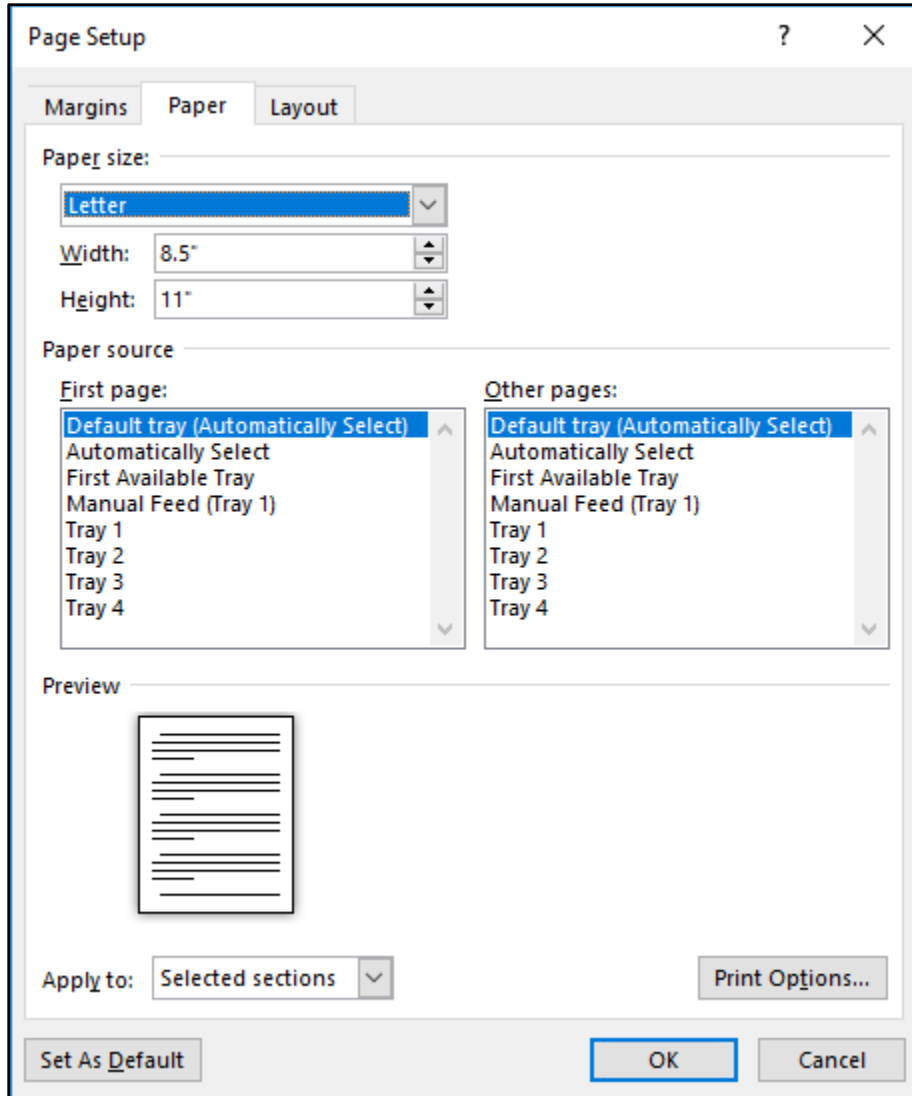


FIGURE 17-5

Setting Up Your Document for Manual Feed

If you would like to automatically print your document from the manual feed tray (for letterhead and the like), click the **Layout ribbon** → **Page Setup launcher** → **Paper tab**. You can choose the **Paper Source** for the **First page** and **Other pages**.

Headers and Footers

The **Layout ribbon** → **Page Setup launcher** → **Layout tab** contains options for controlling **Headers and footers**. These options will be discussed in greater detail later in this section.

Vertical Alignment

Under the **Layout ribbon** → **Page Setup launcher** → **Layout tab** you can now control how text is vertically aligned on a page by clicking the **Page Vertical alignment drop down box** and choosing **Top**, **Center**, **Justified** or **Bottom**.

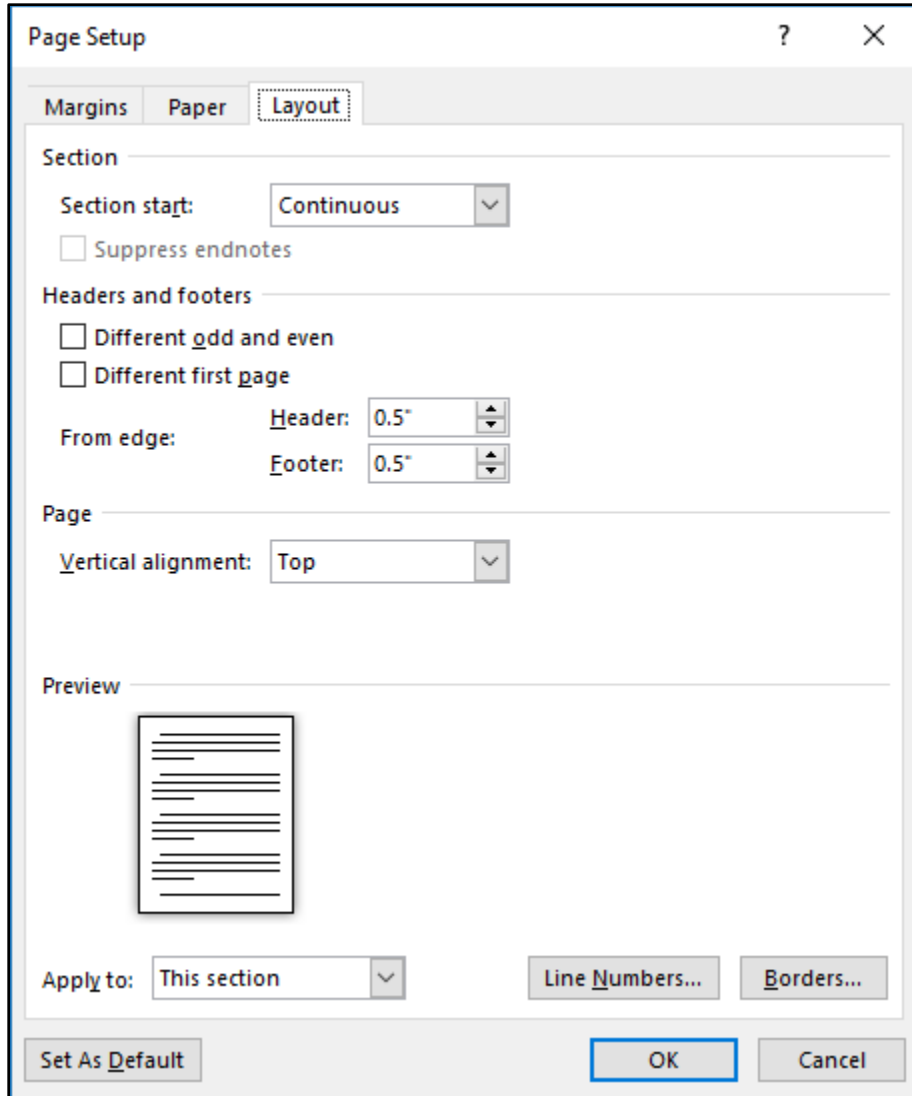


FIGURE 17-6

Line Numbering

To insert line numbering, click the **Layout ribbon** → **Page Setup launcher** → **Layout tab** → **Line Numbers... button**.

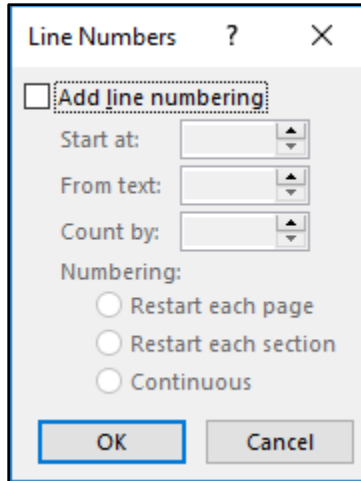


FIGURE 17-7

Borders

The **Borders and Shading dialog** can also be accessed from within the **Layout ribbon** → **Page Setup launcher** → **Layout tab** by clicking on the **Borders...** button.

Legal Tip - Printing Specific Sections and Pages

- If you want to print the entirety of section 3 of a document (for example), open the print dialog (**File menu** → **Print**) (SK: **Ctrl + P**) and enter the section like this: S3

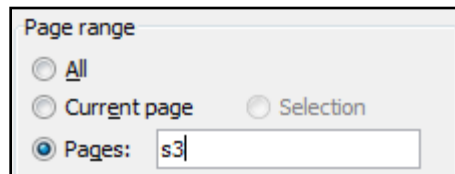


FIGURE 17-8

- If you want to print specific pages of a particular section (such as pages 1 through 13 of Section 3), enter them like this:

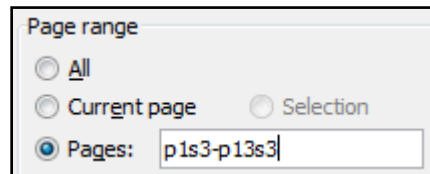


FIGURE 17-9



Lawyerist
LAB®

Ready to create the law firm of your dreams?

Our small firm-focused coaching program is here to guide you on your journey to a healthy firm. Lawyerist Lab is the place for innovative, modern, and entrepreneurial small law firm owners who want to explore better ways to do law.



Build a Solid Foundation

Learn to remove roadblocks to build and streamline the strategy and systems that help your practice run smoothly.

Get Expert Guidance

Our team of expert coaches are small business owners themselves, ready to help you eliminate uncertainty and indecision, and find freedom in your firm.

Be Part of the Community

Join a robust and engaged community of like-minded small law firm owners and find the support and encouragement to help you thrive.

Visit lawyerist.com/coaching to learn more!