

# 2 STOP LETTING WORD ABUSE YOU

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## WITH WORD, PRACTICE DOES NOT MAKE PERFECT

### Two Important Facts About Microsoft Word

**Fact 1:** 100% of the formatting problems you've experienced when drafting new documents can be completely avoided before they occur.

**Fact 2:** When editing a document someone else drafted, any formatting glitches can be resolved in just a few clicks, no matter how bad of a mess it is.

Unfortunately, the foregoing facts are true only if you have mastered Word.

If, instead you feel like every complex document turns into a wrestling match, don't feel bad. Only a tiny percentage of users have actually achieved Word domination. In my decades of experience, even people who feel they know what they are doing with Word have almost always misdiagnosed themselves. The ability to beat text into submission via formatting work-arounds and hacks does not indicate that one knows how to skillfully use Word. Word should be doing the work for the user, not the other way around.

### Why Word Is Frustrating

Most users find Word to be pretty frustrating when drafting or editing documents with complex formatting. This is because many of Word's most important features are either concealed or nearly impossible to figure out without research and training. For example, assume you drafted a contract containing headings/titles and you do not want page breaks to separate your headings from the paragraphs that follow them. Further, you have a signature line and acknowledgment at the end which you would like to keep together on a single page not separated by page breaks. There are features in Word which will take care of this for you automatically, but good luck finding them. No button on any tab or ribbon will help you. You just have to *know* to right-click the relevant paragraph or heading → choose **Format** → **Paragraph** → click the **Line and Page Breaks Tab** → check "**Keep with next**" and/or "**Keep lines together**" as appropriate. There are many Word features like this.

For another example, the most important feature one must understand in Word is styles; and nothing in Word's interface indicates this. Clicking around in Word will not reveal what styles are, how they work, or how to control them. Word's (fairly useless) built in help sheds little light on the subject. I can give you all of the steps to construct a 5-level deep, auto-paragraph numbered outline that works perfectly in every situation thanks to Styles. However, you can use Word every day for the rest of your life and not stumble upon those steps or discover what they are by accident. Having said that, Styles are definitely not difficult or illogical. To the contrary, they're a wonderful formatting tool, they allow you to completely control font and paragraph formatting in your documents, and they behave predictably in all situations. It's just that they're not easily mastered simply by using Word; and Word's interface conveys no hint of their importance.

### How To Achieve Word Enlightenment

In my experience, Word proficiency is only built by working through a comprehensive manual (of course, no printed manuals accompany the program) or taking hands-on classes. Most people would rather clean toilets than read

software manuals, but you have to keep in mind that not all classes are created equal. The critical issue is that legal professionals need to understand word processor functionality that most people have no use for. For example, we need to master automatic paragraph numbering, outline numbering, and auto-updating tables of contents, tables of authority and paragraph cross references. We need to know how to turn page numbering on and off in the middle of a document, start it over, and switch from romanettes to Arabic and back again. We need to understand how footnotes and endnotes work, when section breaks are necessary and how to control Styles. These are precisely the kind of features ignored in Word classes designed for the general public. So it is important to find legal-specific training which will address these issues.

## **Word Processing Is Complicated So Training Is Required**

The fact that mastering Word requires training isn't the problem. The problem is that most people don't expect a word processor to be that complicated. There's a general assumption that simply using the program over time will increase one's skill with it. I'm here to tell you that this assumption is patently false when it comes to Word. For example, I ran a quick search on [www.amazon.com](http://www.amazon.com) for Word 2016 Mac manuals.<sup>1</sup> *Office 2011 for Macintosh: The Missing Manual* by Chris Glover is 816 pages; and *Microsoft Office 2008 for Mac: Visual QuickStart (Visual QuickStart Guide)* by Steve Schwartz is 544 pages. There are no Mac-specific, Word-only manuals on Amazon. Page counts for Word for Windows manuals are even worse. *Microsoft Word 2013 (Signature Series)* by Rutkosky and Roggenkamp is 1,152 pages; *Word 2013 Bible* by Bucki is 1,056 pages; and *Word 2013 In Depth* by Wempen is 1,008 pages. The page counts alone would indicate that there's a lot more going on here than most people expect.

For years, I've heard experienced Word users complain that Word can't do this and can't do that. I always ask those complaining if they've ever read a whole manual on Word or taken a hands-on class. Invariably, the answers are no. When I demonstrate how easily one can do all of the things they were complaining about, they often look at me like I just pulled off some kind of David Copperfield magic trick. Once you learn how the program works, it's not complicated (and I'm no magician). Ultimately, you can't complain about the politicians if you don't vote; and you can't gripe about the technology if you don't attempt to educate yourself. The thing to remember with Word is that practice does not make perfect unless you know what to practice; and simply using the program won't reveal it.

## **BENEFITS OF WORD PROCESSOR EFFICIENCY FOR LAW OFFICES**

### **Ultimate Tool for Creating Work Product**

As you know, legal services are typically document intensive and often, the service rendered is the document itself (estate planning documents, purchase contracts, leases, etc.). Even in practice areas where the document is not the final product (such as litigation), most of the work still involves creating documents. In view of this, efficient use of the tool we use to create documents (Microsoft Word) is extremely important.

### **Client Service and Professionalism**

The reality of our profession is that clients are often unable to judge the quality of our work simply because they lack the necessary training. Notwithstanding this fact, there is no question that consumers of legal services form opinions about their attorneys. These opinions typically have little to do with the quality of the work and a lot to do with things like responsiveness, communication and the speed with which the work is completed. Since efficient word processing significantly improves all three of these aspects, it can directly affect client relations.

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<sup>1</sup> Yes, 2016. There were none available for 2019 as of this writing (January 2019).

In addition, document appearance creates a distinct impression with the client. Sloppy document formatting, typos and other mistakes cause clients to doubt their attorney's competence, even if the document is substantively sound.

## **Keeping Up**

An attorney's stress level is often directly proportional to the length of his/her "to-do" list, and the majority of the "to-dos" are usually related to some type of document generation.

## **Efficiency**

In spite of its obvious importance, the majority of Word users only utilize a fraction of the functionality available simply due to a lack of instruction. For example, it is common for even experienced Word and WordPerfect users to waste huge amounts of time wrestling with paragraph numbering and document formatting or manually performing tasks that word processors can perform automatically (and instantly) such as generating a table of contents, a table of authorities, cross references, footnotes and the like. It should also be noted that the number of years spent using a particular word processor often has absolutely no correlation to the skill level developed.

The point is that word processing is an area of significant inefficiency for almost all law firms and legal departments. So do not fool yourself into believing that document production efficiency cannot be improved dramatically even if you consider your staff grizzled veteran users of Word or WordPerfect.

## **Self-Reliance**

As a lawyer, if you decide to master a single program, it should be the word processor. The standard procedure of: dictation, transcription, edit/modify, enter corrections, edit/modify, enter corrections is THE most inefficient means possible of producing documents. It may be the way it's been done for years, but it's still extremely inefficient. The only less efficient method would be to write the first draft out long-hand on legal pads instead of dictating it. Anyway, be self-reliant and fast, and you'll get a lot more done, you'll bill more hours and you'll reduce your costs. If you're working for yourself, wait until you realize how much it costs to hire someone to type things for you. You'll be inspired.

## **Reduction in Malpractice Risk**

Forgotten metadata or one little undetected typo in a legal document can mean bad results for your client and malpractice claims. Understanding the word processor's built in automation and document assembly features can significantly reduce the chances of these things happening to you.

# 5 WORD'S "FLUENT USER" INTERFACE

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## DON'T BE ALARMED, THIS IS A GOOD THING

Office 2016 introduced an entirely new interface to the user compared to prior versions.<sup>3</sup> In addition to the regular menus, as there were in earlier versions of Office, now there is a new "ribbon" interface. Through focus group research and surveys, Microsoft discovered that many users wished Word contained features which were already there. In other words, most users are completely unaware of many features and functionality already present in Word 2011 and prior versions. This is because Microsoft long ago ran out of places to put all of the new features they were stuffing into every subsequent version.

To address this problem, Microsoft decided to completely redesign the interface and make Word's features more accessible and easier to find. The end result is an aesthetically pleasing, modern interface where all of the tools you need are one click away and no longer buried under menu, sub-menus and sub-sub-menus.

## OUR TAKE ON THE NEW INTERFACE

As an expert Word 2011 user, I found it a bit difficult to figure out where everything was relocated to in the new version. However, once I became acclimated, I liked the new interface a lot better than the old one. Among our clients (all law firms and legal departments) who have migrated to Word 2007/10 for Windows and 2016/2019 for Mac, the general consensus is clearly that the new interface is better and users really like it.

## WHAT THE NEW INTERFACE MEANS FOR LEGAL USERS

Most firms will experience an initial decrease in productivity as people learn the new interface in Word 2016/2019. However, this is natural and only temporary. It's likely that productivity will actually increase once users are familiar with the new interface. Here are our recommendations:

- Do not install Word 2016/2019 on only one or two users' computers if everyone else in your office is using the old version. Generally speaking, you want to try and move everyone at once so that they can help each other figure things out in the new version.
- Training in the new version is critical. A hands-on class introducing the new interface and helping new users feel comfortable will accomplish in a few hours what users would take weeks to figure out by "playing with it" or "clicking around." Training allows you to hit the ground running, so to speak, and immediately begin improving productivity.

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<sup>3</sup> Office 2019/Microsoft 365 modified the icons to make them look sleeker and more modern.

## WORD 2019/365'S BASIC INTERFACE TERMINOLOGY

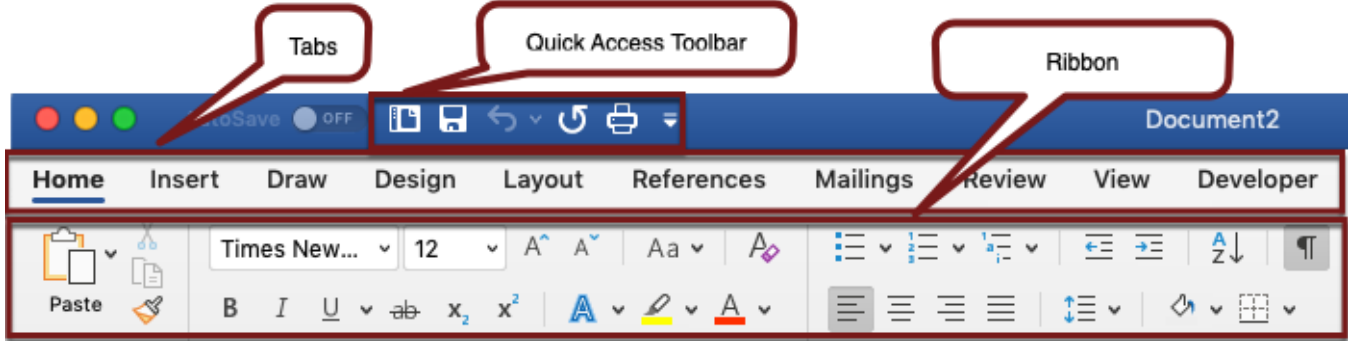


FIGURE 5.1

### Quick Access Toolbar

Use and modify the Quick Access Toolbar ("QAT") to store your most frequently used commands. By default, the Quick Access Toolbar is configured with what Microsoft believes are the most commonly-used functions. To see how you can modify and customize the QAT, see Quick Access Toolbar recommended modifications on page 16 below.

### Tabs

The tabs are located at the top of the screen, immediately below the title bar, and replace some commands from the old menu bar. The tabs work similarly to the menu bar, except instead of listing different menus, the tabs are used to change Ribbons.

### Contextual Tabs

Contextual tabs are tabs that appear based on what you have selected in the main Word document. For example, there is a "Table Layout" contextual tab that appears only if your cursor is within a table. The beauty of Contextual Tabs is that they appear automatically and provide you with every imaginable tool related to edit the object you're working on (table, graphic, etc.).

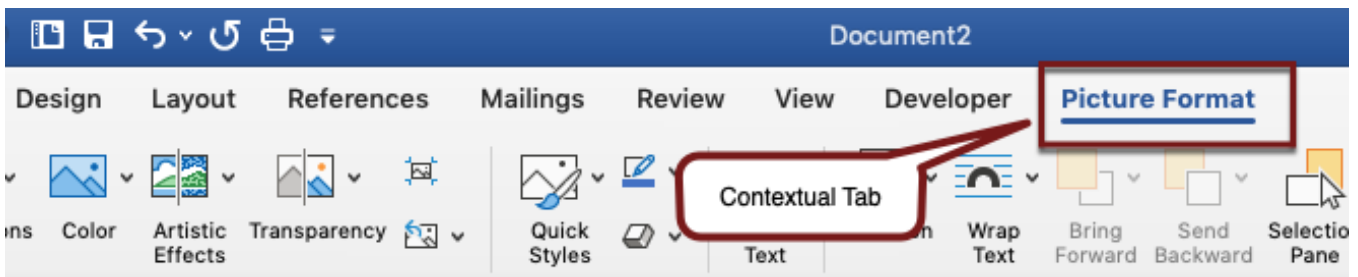


FIGURE 5.2

### Ribbon

Ribbons have replaced menus and toolbars and contain (almost) all of the commands that are used to format a document. Each ribbon contains a group of related commands and functions. There are 8 main ribbons that are always present, and multiple ribbons that only appear with a contextual tab. The 8 main ribbons are:

- Home                      Basic font, paragraph and editing (cut, copy paste, find, replace, etc.). tools.
- Insert                     Headers, footers, tables, fields, symbols and graphics.

Draw	Useful if you have pen-based input technology. You can also use the mouse or trackpad to draw.
Design	Themes, style sets, watermarks
Layout	Margins, page orientation, paper size, columns, section breaks, paragraph spacing, and grouping.
References	Table of contents, footnotes, citations, captions, index, and table of authorities.
Mailings	Envelopes, labels, mail merge.
Review	Spelling & Grammar, comments, track changes, and compare documents.
View	Views (Print Layout, Draft, Outline, etc.), controls for ruler and document map, zoom, split window and macros.
Developer	(Optional to display) Macro and form-related tools

## Ribbon Controls

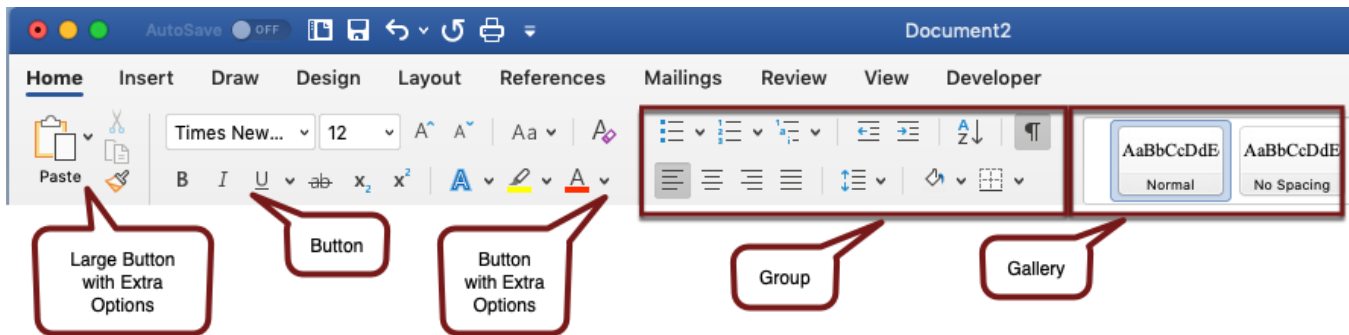


FIGURE 5.3

There are several different types of controls on the ribbon. Commands are arranged into groups. Groups contain a variety of buttons and galleries. Galleries are groups of large buttons with showing a preview of the formatting that will be applied by clicking the gallery entry. Hovering over a gallery entry will cause Word to display a "live preview" of the formatting in the document without actually applying the change.

Not every command is displayed in the ribbon. Extra options for a group of commands can be accessed by the traditional menus at the top of your screen. In addition, a button may have an arrow (triangle) that provides additional options.

If you wish to view the group names, which will be referenced throughout this manual, go to the **Word menu** → **Preferences** → **View**, and check the box labeled "Show group titles".

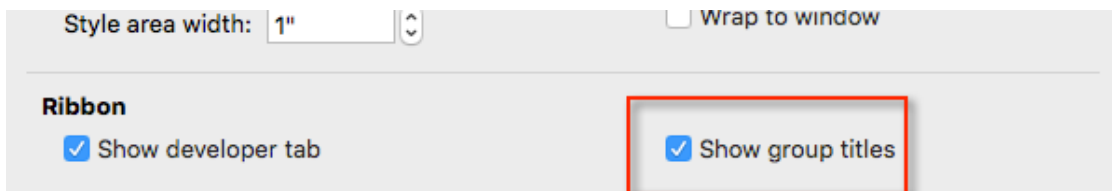


FIGURE 5.4

Thereafter, the ribbon should look like this:

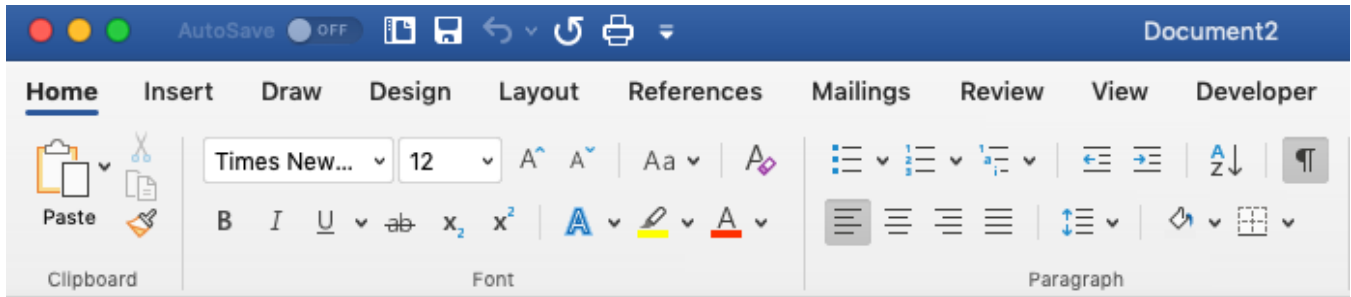


FIGURE 5.5