



MICROSOFT WORD FOR MAC FOR LEGAL PROFESSIONALS

TABLE OF CONTENTS

CHAPTER 1 KEY FOR USING THIS MANUAL

Ribbons.....	1
Groups.....	1

CHAPTER 2 STOP LETTING WORD ABUSE YOU

With Word, Practice Does Not Make Perfect.....	3
Benefits of Word Processor Efficiency for Law Offices	4

CHAPTER 3 MANAGING DOCUMENTS IN A LAW FIRM

What Is Document Management?.....	7
What Are Files and How Are They Stored?.....	7
Disk Storage	7
Folder Structures.....	8
Law Firm Rules for Naming Files when Saving	9

CHAPTER 4 CURRENT FILE TYPES AND RELATED ISSUES

Description of the New File Types.....	10
Benefits of the New File Types	10
Issues the New File Types Create for Lawyers.....	11
What You Can Do About These Issues	11

CHAPTER 5 WORD'S "FLUENT USER" INTERFACE

Don't Be Alarmed, This Is a Good Thing	13
Our Take On the New Interface	13
What The New Interface Means for Legal Users.....	13
Word's Basic Interface Terminology.....	14

CHAPTER 6 RECOMMENDED CUSTOMIZATIONS

Quick Access Toolbar - Suggested Law Office Modifications.....	17
Saving as PDF.....	19
Problems With Word's Default Formatting for Legal Users	19
Word's Default Template.....	20

How To Fix Word's Formatting Defaults.....21

Customize the Status Bar 24

Turn On The Ruler.....25

How to Create Keyboard Shortcuts.....25

CHAPTER 7 SIGNIFICANT NEW FEATURES IN WORD

Improved Paste Functionality.....27

New Navigation Pane.....27

Simple Markup..... 28

Reply to Comments..... 28

Resume Reading 28

Design Ribbon 28

Lock Track Changes 28

CHAPTER 8 DEFAULT SETTING CHANGES FOR WORD

In General.....29

Preferences → General.....29

Preferences → View 30

Preferences → Edit32

Preferences → Spelling & Grammar.....33

Preferences → AutoCorrect 34

Preferences → Save.....36

Preferences → Print37

Preferences → Track Changes38

Preferences → User Information39

Preferences → Security & Privacy.....40

Preferences → File Locations..... 41

CHAPTER 9 WHERE TO GET HELP WITH WORD

Options For Self Help..... 42

Call or Email Someone Who Can Help..... 42

Three Golden Rules Legal Users Need to Know..... 42

CHAPTER 10 WORD BASICS

File Operations..... 45

Tip - Selecting More Than One File or Folder at a Time 46

Screen Views - Improve or Enhance Document Viewability 46
 Viewing Two Sections of the Same Word Document Simultaneously 49
 Print and Print Preview 50
 Protecting against Lock-Ups and Document Corruption - Legal Tip 52

CHAPTER 11 TOOLS FOR DOCUMENT EDITING

Why This Is Important 53
 Moving Around a Document 53
 Undo and Redo Shortcut Keys 54
 Insert Text 54
 Select Text 54
 Delete Text 55
 Copy, Cut and Paste 55
 Legal Tip - Using Go To for Quick Navigation 57
 Legal Tip - Holding Your Place in Long Documents with Virtual Bookmarks 57
 Legal Tip - Finding Text in Your Documents 58
 Find and Replace 60

CHAPTER 12 PROOFING YOUR WORK

Customizing Spell and Grammar Check 61
 Spell Check 62
 Useful Reference Web Sites 63
 AutoCorrect 64
 Grammar Check 67
 Thesaurus 67

CHAPTER 13 WORD FORMATTING PRINCIPLES

The Microsoft Word Approach to Formatting 69
 Format Painter 71
 Wipe Out All Paragraph and Font Formatting 72

CHAPTER 14 FONT FORMATTING

Adopting Uniform Standards for Your Firm 73
 Font Group on the Home Ribbon 73
 Symbols 73
 Other Font Formatting Tips 74

Emphasizing Text in a Document.....76
 Non-Breaking Spaces and Hyphens..... 78

CHAPTER 15 PARAGRAPH FORMATTING FUNDAMENTALS

Paragraph Group of the Home Ribbon79
 What Happens when Paragraph Marks Are Deleted79
 Paragraph Alignment79
 Line Spacing80
 Automatic Spacing Between Paragraphs80
 Keeping Text and/or Paragraphs Together..... 81
 Automatically Start a Paragraph at the Top of a New Page83
 TIP - What To Do If You Experience Bizarre Page Breaks.....83
 Tabs83
 Signature Lines..... 86
 Indents 87
 Borders and Shading..... 89

CHAPTER 16 PARAGRAPH FORMATTING - PARAGRAPH NUMBERING AND BULLET POINTS

Bullets and Numbering - a Warning.....91

CHAPTER 17 TO COMPLETELY CONTROL NUMBERED OR BULLETED PARAGRAPHS, YOU NEED TO LINK YOUR NUMBERING SCHEME TO "STYLES" IN WORD. A STYLE IS A SET OF FORMATTING CHARACTERISTICS THAT YOU CAN APPLY TO TEXT, TABLES, AND LISTS IN YOUR DOCUMENT TO QUICKLY CHANGE THEIR APPEARANCE. WHEN YOU APPLY A STYLE, YOU APPLY A WHOLE GROUP OF FORMATS AT ONCE. LINKING NUMBERS AND STYLES ALLOWS YOU TO SIMULTANEOUSLY CONTROL THE FORMATTING OF THE NUMBER/LETTER AND THE FORMATTING OF THE PARAGRAPH THAT FOLLOWS THE NUMBER. IF YOU USE BULLETS OR NUMBERING IN ISOLATION (WITHOUT LINKING THEM TO STYLES), THE ONLY THING YOU CAN CONTROL WITH THE NUMBERING SCHEME IS THE FORMAT OF THE NUMBER ITSELF. TO READ MORE ABOUT STYLES, SEE CHAPTER 1 -

Bullet Points95
 Single-Level Paragraph Numbering..... 96

Adjust Indents for Bullets and Single-Level Numbered Lists..... 98
 Multi-Level Paragraph Numbering 99

CHAPTER 18 PAGE FORMATTING (SECTIONS PART 1)

Non-Section Breaks..... 104
 Section Breaks105
 Page Setup.....106
 Legal Tip - Printing Specific Sections and Pages110

CHAPTER 19 HEADERS, FOOTERS & PAGE NUMBERING (SECTIONS PART 2)

Header and Footer Ribbon 112
 Create a Header or Footer 112
 Our Advice on Page Numbering..... 112
 Page Numbers Manually Inserted into a Header or Footer..... 113
 Insert the Total Number of Pages in the Document..... 113
 Number All Pages Except The First..... 113
 Create Page Numbering within Multi-Section Documents.....114
 Insert the Total Number of Pages in a Particular Section of the Document.....120
 Insert the Filename and Path in the Footer of Your Document..... 121

CHAPTER 20 STYLES - THE BASICS

What Are Styles?..... 122
 Word Uses Styles Whether You Want Them or Not..... 122
 Two Formatting Approaches in Word..... 122
 Advantages of Styles..... 123
 Types of Styles 124
 All-Important Rules of Styles 124
 Default Style 128
 Changing the Font For the Entire Document.....130
 Using Existing Styles 132
 Create and Apply New Styles 132
 Modify an Existing Style 134
 Using Styles..... 134
 Copy Existing Styles Into Documents You're Working On..... 135

CHAPTER 21 STYLES - ADVANCED

The Key to Success.....138
 Tips and Things to Remember before We Get Started.....138

CHAPTER 22 USING "HEADING" STYLES DOESN'T MEAN THAT THESE STYLES SHOULD ONLY APPLY TO THE HEADINGS. FOR EXAMPLE, IF MY PARAGRAPHS LOOK LIKE THE ONE BELOW, IN ALMOST EVERY CASE, I WOULD APPLY HEADING 2 TO THE ENTIRE PARAGRAPH 1.1. (NOT JUST THE WORD FORMATION). HOWEVER, IF I WANTED TO AUTOMATICALLY PULL OUT A TABLE OF CONTENTS AND ONLY INCLUDE "1.1. FORMATION" IN IT (AND NOT THE REST OF THE PARAGRAPH), THEN I WOULD ONLY APPLY HEADING 2 TO THE WORD FORMATION. THIS PROCESS IS DESCRIBED IN GREATER DETAIL UNDER

STEP 1 - Modify the Heading Styles or Create Your Own.....141
 STEP 2 - Create Your Outline Numbering.....143
 STEP 3 - Apply Styles to Your Paragraphs.....144
 STEP 4 - Subsequent Formatting Changes.....144
 Other Items To Consider145

CHAPTER 23 STYLES GALLERY

Styles Gallery146

CHAPTER 24 TABLE OF CONTENTS IN LEGAL DOCUMENTS

Table of Contents - Three Methods.....148
 Document with Segregated Titles.....148
 Document with Non-Segregated Titles151
 Update the Table of Contents.....156
 Formatting the Table of Contents.....156

CHAPTER 25 TABLE OF AUTHORITIES

In General.....157
 Mark the Citations157
 Generate a Table of Authorities Based on Your Marked Citations.....158
 Page Number Warning.....158
 Editing Table of Authorities Entries by Editing TOA Fields.....159

CHAPTER 26 CROSS REFERENCING PARAGRAPH NUMBERS

Cross References	165
Insert a Cross Reference Using the "Numbered Item" Method.....	165
Insert a Cross Reference Using the "Bookmark" Method	165
Update Cross References.....	166

CHAPTER 27 REDLINING & PROTECTING ATTORNEY WORK PRODUCT

Negotiating Documents in General.....	167
Adding Comments.....	167
Comparing Documents Electronically.....	168
Combining Documents	172
Tracking Changes as you Edit.....	173
Prevent Editors from Turning Off "Track Changes"	174
Metadata.....	175
Protecting Confidential Documents - Legal Tip.....	176

CHAPTER 28 AUTOMATE WITH MACROS AND AUTOTEXT CLAUSE LIBRARIES

AutoText.....	178
What Are Macros.....	180
When Should I Use a Macro?.....	180
Where Are Macros Stored?.....	180
Moving Macros from One Template to Another.....	180
Record Macros	181
If You Make a Mistake while Recording a Macro	182
Play Macros.....	182
Assigning a Macro To a Keystroke.....	182
Assigning a Macro to a Quick Access Toolbar Button.....	183

CHAPTER 29 TEMPLATES IN GENERAL

Templates Defined.....	184
Why You Need to Use Templates.....	184
Two Basic Types of Templates.....	184
Normal Template (Default).....	185
Working with Templates.....	186

Creating Templates187
 Using Templates.....188
 Modify a Template.....188
 Sharing Templates188

CHAPTER 30 FILLABLE FORM TEMPLATES

What Are Fillable Form Templates?190
 Significant Benefits of Fillable Forms.....190
 Create a Form.....190
 Form Field Descriptions and Uses192
 Advanced Techniques.....194
 Fill a Form.....199
 Using Fill-In Fields.....199

CHAPTER 31 MAIL MERGE

When Mail Merge Is Useful201
 Steps In a Mail Merge201
 Mail Merge Example.....201

CHAPTER 32 DE-CONSTRUCT AND RE-BUILD ANY DOCUMENT - NO MATTER HOW BAD IT IS

We've All Been There.....203
 Step One - Turn On Show Hide.....203
 Step Two - Determine If You Need To Start With a New Document.....203
 Step Three – Copy or Create.....204
 Step Four - Take Notes About What You're Trying To Replicate204
 Step Five - Remove Unnecessary Keystrokes.....205
 Step Six - Wipe Out All Font and Paragraph Formatting208
 Step Seven - Fix Default Font and Paragraph Settings.....208
 Step Eight - Fix Default Page Settings.....210
 Step Nine - Fix Page Numbering.....212
 Step Ten - Delete Any Manually Compiled Reference Tables213
 Step Eleven - Build and Apply Styles To Handle Formatting213
 Step Twelve - Deal with Footnotes213

CHAPTER 33 THERE ARE A COUPLE OF ISSUES AT PLAY WITH FOOTNOTES. IF YOUR ORIGINAL DOCUMENT WAS ONCE A WORDPERFECT DOCUMENT, WHICH WAS CONVERTED TO WORD, THE FOOTNOTES CAN BE A COMPLETE MESS. THE NUMBERING MAY NOT WORK CORRECTLY, THE FOOTNOTES MAY BREAK ACROSS PAGES AND THERE ARE MANY OTHER ISSUES. IF YOU ELECTED TO START OVER AS DESCRIBED ABOVE, THEN THE ACT OF PASTING UNFORMATTED TEXT INTO YOUR NEW DOCUMENT SIMULTANEOUSLY REMOVED ALL FOOTNOTES FROM YOUR DOCUMENT. THEREFORE, YOU'LL HAVE TO MANUALLY RE-INSERT THEM BY COPYING THEM FROM THE ORIGINAL DOCUMENT. FOR MORE INFORMATION, SEE CHAPTER 1 -

Step Thirteen - Add Paragraph Cross References 217
 Step Fourteen - Generate Tables of Contents and Authorities Properly 217

CHAPTER 34 IF EITHER OR BOTH OF THESE WERE PRESENT IN YOUR ORIGINAL DOCUMENT. INSERT AN AUTOMATICALLY UPDATING TABLE OF CONTENTS BY CLICKING ON REFERENCES RIBBON → TABLE OF CONTENTS GROUP → TABLE OF CONTENTS → CUSTOM TABLE OF CONTENTS... INSERT AN AUTOMATICALLY UPDATING TABLE OF AUTHORITIES BY CLICKING ON REFERENCES RIBBON → TABLE OF AUTHORITIES GROUP → INSERT TABLE OF AUTHORITIES BUTTON. SEE FULL EXPLANATIONS IN CHAPTER 1 -

CHAPTER 35 TABLE OF CONTENTS IN LEGAL DOCUMENTS ON PAGE 142 AND CHAPTER 1 -

CHAPTER 36 ENVELOPES

Printing an Envelope 222
 Changing the Envelope Delivery Address and Return Address Fonts 224

CHAPTER 37 ENDNOTES AND FOOTNOTES

Insert a Footnote 226
 Edit a Footnote 227
 Delete a Footnote 227
 Convert Endnotes to Footnotes, or Vice Versa 227
 To Convert Just One Note 227
 Force Each Footnote To Stay Together On One Page 228

Change the Footnote Separator Line228

CHAPTER 38 TABLES

What Is a Table? 229

Inserting a Simple Table 229

Basic Editing of a Table 229

Sort Data in a Table..... 231

Convert Text to a Table and Vice Versa..... 232

Perform Calculations in a Table 232

When Should I Use Tables? 233

CHAPTER 39 AUTO NUMBERING (LETTERING) EXHIBITS AND SCHEDULES

Auto-Numbering/Lettering Exhibits or Schedules To A Document234

Fixing The Caption Style 235

Cross Referencing to Exhibits and Schedules 236

CHAPTER 40 WORKING WITH WORDPERFECT FILES

A Word About This Chapter 237

Why Word Users Need To Understand How To Handle WordPerfect Documents..... 238

Recommended Approach: Word Users Who Occasionally Edit WP Documents 238

Recommended Approach: WP Users Who Occasionally Edit Word Documents 239

Options for Word Users Who Have To Convert WP Documents To Word 239

Problems With The Foregoing Options 240

Recommended Option For You 241

If You Get an Error Opening WP Documents In Word 241

If You Are Switching from WP to Word 242

How To Clean Up A Document Word or WP Converts..... 242

Formatting Raw Text..... 245

CHAPTER 41 COMMON SPEED KEYS

Speed Keys Commonly Used in Word.....246