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Mastering Microsoft Word in the Law Office

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MASTERING MICROSOFT WORD IN THE LAW OFFICE

October 25, 2023

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MASTERING MICROSOFT WORD IN THE LAW OFFICE



Agenda

8:30 A.M. Registration

9:00 A.M. Customizing Word for a Law Office

- Customizing Word's interface for a legal user
- Permanently fix Word's default formatting (font, paragraph & section) to something appropriate for legal documents
- Role of the default template (Normal.dotm) and how to customize it
- Fixing Word's programmatical default settings - the key to making Word usable in a legal environment

Security Issues for Legal Users

- Metadata removal, encrypting documents, email encryption options, meeting confidentiality duties under the Rule of Professional Conduct 1.6
- Why .doc files should be avoided in favor of .docx and how to convert them.
- How to de-corrupt documents

9:30 A.M. Editing & Proofing

- How to view 2 sections of the same document simultaneously
- Long document navigation tools
- Different methods for text blocking
- Cut, copy & paste - how to strip off unwanted formatting, using Word's multiple clipboards.
- Advanced find, find & replace and the go-to function.
- Proofing - spellcheck, autocorrect, grammar check & thesaurus.

10:30 A.M. Coffee Break

10:45 A.M. Font and Paragraph Formatting in Legal Documents

- Explanation of Word's tripartite approach to formatting (font, paragraph & section)
- How to transfer preferred formatting onto text formatted incorrectly.
- How to strip formatting from wayward text, controlling the formatting defaults for a particular document
- Font formatting
- Inserting symbols and assigning shortcut keys to them
- Nonbreaking spaces & hyphens - how to insert them and when they're appropriate.
- Paragraph formatting
- Alignment
- Line spacing
- Automatic paragraph spacing - why it's critical.
- Avoiding inappropriate/awkward page breaks by holding headings, text and paragraphs together
- Tabs - types, how they are used, best practices for signature lines.
- Indents - shifting text left or right while maintaining proper alignment.

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Agenda Continued

12:00 P.M. Lunch Break

1:00 P.M. Headers & Footers, and Page Numbering (Section Formatting)

- Section (whole document) formatting attributes
- Complex page numbering (start over, stop in the middle of a document, switching from Romanettes to Arabic in the same document, etc.) in an example appellate brief.

1 :30 P.M. Automatic Paragraph Numbering and Cross References

- Automatic paragraph numbering - bullets, single level numbering and multi-level list numbering
- Paragraph cross references which automatically update.

2:00 P.M. Introduction to Word's Styles Feature

- This is by far the most important feature of Word: Why you must learn to control them, what they are & how they work, how to control them.
- How to open and customize the Styles Pane in Word
- Copying styles from one document to another, using the style organizer, style inspector and apply styles pane.
- How to customize styles
- How to create an automatic table of contents using styles

3:00 P.M. Refreshment Break

3:15 P.M. Document Automation Techniques

- Macros - AutoText - Optional to cover if time permits - Mail merge.

3:45 P.M. Redlining and Protecting Work Product

- Comments - Tracking proposed changes - Comparing documents to produce a redline

4:20 P.M. Time permitting - Tables of Authority

4:30 P.M. Adjournment

Faculty

Mr. Barron K. Henley, Esq.

Affinity Consulting Group, LLC

1550 Old Henderson Road, Suite S-150

Columbus, OH 43220

ph: (614) 602-5561

e-mail: bhenley@affinityconsulting.com

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Barron K. Henley, Esq., Affinity Consulting Group, LLC, Columbus OH



Barron K. Henley, Esq. is one of the founding partners of *Affinity Consulting Group*, a legal technology consulting firm focused on automating and streamlining law firms and legal departments. He earned his B.S./B.A. (marketing and economics) and J.D. from The Ohio State University and is a member of the American, Ohio and Columbus Bar Associations, and the Worthington Estate Planning Council. He is a Fellow of the College of Law Practice Management, a Fellow of the American Bar Foundation, a member of Ohio Supreme Court Commission on Technology and the Courts, and a member of both the ABA Law Practice Management and the Real Property Trust and Estate Law ("RPTE") Sections. He's also a former member of RPTE Futures Task Force, a former Board Member for the ABA TECHSHOW, and the former Chair of the Ohio State Bar Association Law Office Automation & Technology Committee. Mr. Henley heads Affinity's document assembly/automation and software training departments. Barron is also an expert in launching new law firms, overhauling existing firms, and documenting and re-engineering law firm processes. Finally, Barron teaches continuing legal education (CLE) classes throughout the U.S. and Canada covering a wide variety of topics related to law practice management, technology, and ethics.