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# MICROSOFT WORD

## FOR LEGAL PROFESSIONALS

Covering Word for Windows Versions  
2013, 2016, 2019, 2021 and Microsoft 365

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# MICROSOFT WORD

## FOR LEGAL PROFESSIONALS

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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.

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Version 3.03



# 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
Word 365 File Menu .....	13
Collapsing White Space Between Pages .....	14
Show Ribbon Options .....	14

### CHAPTER 4 CURRENT FILE TYPES

Description of the Current File Types .....	16
Benefits of the Current File Types .....	16
Always Convert Old Files to New Format .....	16

### CHAPTER 5 NORMAL TEMPLATE

Introduction to Templates .....	18
Normal Template .....	18

### CHAPTER 6 NEW FEATURES

Introduced in Word 2013 .....	20
Introduced in Word 2016 .....	21
Introduced in Word 2019 .....	22

Introduced in Word for Microsoft 365..... 23

**CHAPTER 7 DEFAULT SETTING CHANGES FOR WORD 2013**

In General..... 25

Options ➔ General ..... 25

Options ➔ Display ..... 27

Options ➔ Proofing ..... 28

Options ➔ Proofing and Autocorrect ..... 29

Options ➔ Save..... 32

Options ➔ Advanced ➔ Editing Options..... 33

Options ➔ Advanced ➔ Cut, Copy and Paste ..... 33

Options ➔ Advanced ➔ Show Document Content ..... 34

Options ➔ Advanced ➔ Fidelity & General..... 35

Options ➔ Advanced ➔ Layout Options..... 36

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Protected View ..... 36

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Trusted Locations ..... 38

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ File Block Settings..... 39

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Privacy Options ..... 40

Lock In Your Setting Changes..... 40

Fix Track Changes Settings ..... 40

**CHAPTER 8 DEFAULT SETTING CHANGES FOR WORD 2016**

In General..... 42

Options ➔ General ..... 42

Options ➔ Display ..... 44

Options ➔ Proofing ..... 45

Options ➔ Proofing and Autocorrect ..... 45

Options ➔ Save..... 49

Options ➔ Advanced ➔ Editing Options..... 50

Options ➔ Advanced ➔ Cut, Copy and Paste ..... 51

Options ➔ Advanced ➔ Show Document Content ..... 52

Options ➔ Advanced ➔ Fidelity & General..... 53

Options ➔ Advanced ➔ Layout Options..... 54

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Protected View ..... 54

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Trusted Locations ..... 56

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ File Block Settings..... 57

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Privacy Options ..... 59

Lock In Your Setting Changes..... 59

Fix Track Changes Settings..... 59

**CHAPTER 9 DEFAULT SETTING CHANGES FOR WORD 2019**

In General..... 61

Options ➔ General ..... 61

Options ➔ Display ..... 63

Options ➔ Proofing ..... 64

Options ➔ Proofing and Autocorrect ..... 64

Options ➔ Save..... 68

Options ➔ Advanced ➔ Editing Options..... 69

Options ➔ Advanced ➔ Cut, Copy and Paste ..... 70

Options ➔ Advanced ➔ Show Document Content ..... 71

Options ➔ Advanced ➔ Fidelity & General..... 72

Options ➔ Advanced ➔ Layout Options..... 73

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Protected View ..... 73

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Trusted Locations ..... 75

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ File Block Settings..... 76

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Privacy Options ..... 78

Lock In Your Setting Changes..... 78

Fix Track Changes Settings..... 79

**CHAPTER 10 DEFAULT SETTING CHANGES FOR WORD FOR MICROSOFT 365/2021**

In General..... 81

Options ➔ General ..... 81

Options ➔ Display ..... 84

Options ➔ Proofing ..... 85

Options ➔ Proofing and Autocorrect ..... 86

Options ➔ Save..... 89

Options ➔ Advanced ➔ Editing Options..... 90

Options ➔ Advanced ➔ Cut, Copy and Paste ..... 90

Options ➔ Advanced ➔ Show Document Content ..... 91

Options ▶ Advanced ▶ Fidelity & General..... 92

Options ▶ Advanced ▶ Layout Options..... 93

Options ▶ Trust Center ▶ Trust Center Settings Button ▶ Protected View ..... 93

Options ▶ Trust Center ▶ Trust Center Settings Button ▶ Trusted Locations ..... 95

Options ▶ Trust Center ▶ Trust Center Settings Button ▶ File Block Settings..... 96

Options ▶ Trust Center ▶ Trust Center Settings Button ▶ Privacy Options ..... 98

Lock In Your Setting Changes..... 98

Fix Track Changes Settings..... 99

**CHAPTER 11 CUSTOMIZING WORD**

Quick Access Toolbar..... 101

Problems With Word's Default Formatting ..... 107

Fixing Default Formatting ..... 109

Customizing the Status Bar ..... 112

Turning On the Ruler..... 114

Creating Keyboard Shortcuts..... 115

**CHAPTER 12 WHERE TO GET HELP WITH WORD**

Options For Self Help..... 118

Call or Email Someone Who Can Help..... 119

Three Golden Rules Legal Users Need to Know ..... 119

**CHAPTER 13 BASICS**

File Operations..... 121

Screen View Options on the View Ribbon..... 122

Viewing Two Sections of the Same Word Document Simultaneously..... 124

Legal Tip - Full Screen Edit Mode..... 125

Print and Print Preview..... 125

Protecting Against Lockups and Document Corruption..... 125

**CHAPTER 14 EDITING TOOLS**

Navigating Long Documents ..... 127

Undo and Redo Shortcut Keys..... 127

Inserting Text..... 127

Selecting Text..... 128

Deleting Text ..... 129

Copy, Cut and Paste ..... 129

Copying Text From Multiple Sources for Insertion into a New Document.....131

Legal Tip - Using Go To for Quick Navigation .....133

Legal Tip - Holding Your Place in Long Documents with Virtual Bookmarks .....133

Searching (Find) .....135

Find and Replace..... 137

**CHAPTER 15 PROOFING**

Customizing Spell and Grammar Check ..... 139

Spell Check .....140

AutoCorrect..... 142

Grammar Check..... 145

Thesaurus..... 146

**CHAPTER 16 FORMATTING PRINCIPLES**

The Microsoft Word Approach to Formatting .....148

Reveal Formatting..... 150

Format Painter..... 150

Remove All Formatting.....151

**CHAPTER 17 FONT FORMATTING**

Applying Font Formatting .....152

Lower Case, Upper Case, and More .....153

Stretching Title Spacing .....153

Hidden Text ..... 154

Symbols.....155

Non-Breaking Spaces and Hyphens..... 156

"Printing" Problem Actually Related to Font Selection..... 156

**CHAPTER 18 PARAGRAPH FORMATTING FUNDAMENTALS**

Applying Paragraph Formatting ..... 158

What Happens when Paragraph Marks Are Deleted ..... 158

Paragraph Alignment ..... 159

Line Spacing.....160

Spacing Between Paragraphs ..... 160

Holding Lines and/or Paragraphs Together ..... 161



Automatically Start a Paragraph at the Top of a New Page ..... 164

What to Do If You Experience Bizarre Page Breaks ..... 164

Tabs ..... 165

Indents..... 170

Signature Lines ..... 171

Borders and Shading ..... 172

**CHAPTER 19 PARAGRAPH NUMBERING AND BULLET POINTS**

Bullets and Numbering Should Be Linked to Styles ..... 174

Never Use the Numbering or Bullets Buttons..... 174

Single Level Bullet Points ..... 174

Single-Level Paragraph Numbering ..... 177

Multi-Level Paragraph Numbering ..... 177

**CHAPTER 20 PAGE FORMATTING (SECTIONS PART 1)**

Introduction to Sections and Breaks..... 182

Section Formatting ..... 184

Legal Tip - Printing Specific Sections and Pages..... 188

**CHAPTER 21 HEADERS, FOOTERS & PAGE NUMBERING (SECTIONS PART 2)**

Header and Footer Ribbon ..... 189

Create a Header or Footer ..... 189

Our Advice on Page Numbering ..... 190

Page Numbers Manually Inserted into a Header or Footer ..... 190

Insert the Total Number of Pages in the Document..... 190

Number All Pages Except The First..... 190

Create Page Numbering within Multi-Section Documents ..... 191

Insert the Total Number of Pages in a Particular Section of the Document ..... 196

Insert the Filename and Path in the Footer of Your Document ..... 197

Add Filename and Path to Last Page Footer (Automatically) ..... 198

**CHAPTER 22 INTRODUCTION TO STYLES**

Using These Styles Chapters ..... 199

What Are Styles? ..... 199

Two Formatting Approaches in Word..... 199

Advantages of Styles .....200  
 Where Styles Are Stored.....200  
 Rules of Styles .....200

**CHAPTER 23 APPLYING STYLES**

Determining How Styles are Being Used.....206  
 Finding Styles.....207  
 Applying Styles.....208

**CHAPTER 24 STYLES PANE**

Dock the Styles Pane .....209  
 Show Style Previews.....210  
 Customizing the Styles Pane .....210

**CHAPTER 25 STYLES GALLERY**

Expanding the Styles Gallery.....213

**CHAPTER 26 CREATING AND MODIFYING STYLES**

Types of Styles.....215  
 Styles Based on Other Styles.....215  
 Default Formatting: Normal .....216  
 Modifying Existing Styles .....216  
 Creating New Styles .....217  
 Style for Following Paragraph.....218  
 Styles and the Navigation Pane .....219  
 Assigning Keyboard Shortcuts to Styles .....219  
 Don't Automatically Update Styles.....220  
 Styles and Templates.....220

**CHAPTER 27 STYLES AND AUTOMATIC PARAGRAPH NUMBERING**

Key to Success .....222  
 Steps to Automatically Numbering Paragraphs.....222  
 Legal Style Numbering.....226  
 Separating Numbers from Text.....228

**CHAPTER 28 IMPORTING STYLES**

Methods of Importing Styles.....229

Quick Style Sets ..... 229

Organizer..... 230

**CHAPTER 29 TABLE OF CONTENTS**

Creating TOCs..... 234

Updating the Table of Contents .....240

Formatting the Table of Contents..... 241

**CHAPTER 30 TABLE OF AUTHORITIES IN PLEADINGS**

In General..... 242

Setting Up TOA Categories First..... 243

Mark the Citations..... 244

Generate a Table of Authorities Based on Your Marked Citations..... 245

Page Number Warning..... 245

Editing TOA Entries by Editing TOA Fields..... 246

**CHAPTER 31 CROSS REFERENCES**

In General..... 250

Cross Referencing Paragraph Numbers..... 250

Cross Referencing Page Numbers..... 253

Cross Referencing Paragraph and Bookmarked Text..... 254

Cross Reference Capitalization ..... 254

Updating Cross References..... 255

Following Cross References..... 256

Broken Cross References..... 256

**CHAPTER 32 REDLINING & PROTECTING ATTORNEY WORK PRODUCT**

Negotiating Documents in General..... 258

Comments ..... 258

Comparing Documents Electronically..... 260

Combining Documents..... 266

Tracking Changes as you Edit..... 267

Prevent Editors from Turning Off "Track Changes"..... 268

Metadata ..... 269

Protecting Confidential Documents - Legal Tip..... 271

## **CHAPTER 33 AUTOMATING WITH MACROS AND AUTOTEXT CLAUSE LIBRARIES**

Quick Parts and AutoText.....	273
Macros.....	274
Assigning a Macro to a Quick Access Toolbar Button.....	277

## **CHAPTER 34 TEMPLATES IN GENERAL**

Adopting Uniform Standards for Your Organization .....	278
Templates Defined .....	278
Why You Need to Use Templates .....	278
Two Basic Types of Templates.....	278
Normal Template (Default).....	279
Modify Your Normal.dotm Template.....	281
Working with Templates.....	282
Creating Templates .....	284
Using Templates .....	284
Modify a Template .....	285
Sharing Templates .....	285

## **CHAPTER 35 FILLABLE FORMS**

Creating a Form .....	287
Form Field Descriptions and Uses.....	290
Advanced Techniques:.....	292
Complete a Form.....	297
Editing Fields.....	297

## **CHAPTER 36 MAIL MERGE**

Steps In a Mail Merge .....	300
Mail Merge Example.....	300

## **CHAPTER 37 REBUILDING DOCUMENTS**

We've All Been There .....	302
Step One - Download Our Sample Document to Work Through This progression.....	302
Step Two - Turn on Show Hide.....	302
Step Three - Determine If You Need to Start With a New Document.....	302
Step Four - Make A Copy or Create New File.....	303

Step Five - Take Notes About the Formatting You Want to Replicate.....304

Step Six - Remove Unnecessary Characters/Keystrokes ..... 306

Step Seven - Wipe Out All Font and Paragraph Formatting.....308

Step Eight - Set Default Font and Paragraph Settings .....308

Step Nine - Set Margins and Other Section Settings..... 310

Step Ten - Add Page Numbering.....312

Step Eleven - Delete Any Tables of Contents or Tables of Authority.....312

Step Twelve - Clean Up the Styles Pane .....312

Step Thirteen - Customize and Apply Styles.....315

Step Fourteen - Add Back Any Footnotes .....327

Step Fifteen - Add Paragraph Cross References..... 328

Step Sixteen - Generate Tables of Contents and Authorities Properly..... 329

**CHAPTER 38 ENVELOPES**

Creating an Envelope..... 330

Changing the Envelope Formatting.....331

**CHAPTER 39 ENDNOTES AND FOOTNOTES**

Footnotes.....332

Endnotes..... 334

Converting Between Endnotes and Footnotes.....335

**CHAPTER 40 TABLES**

Inserting Tables .....337

Editing Tables..... 338

Formatting Tables..... 345

Sorting Data in a Table .....348

Converting Text to Table .....349

Converting Tables to Text.....349

Performing Calculations..... 350

**CHAPTER 41 EXHIBIT NUMBERING**

Auto-Numbering/Lettering Exhibits and Schedules .....352

Fixing The Caption Style .....353

Cross Referencing Exhibits and Schedules.....353

## **CHAPTER 42 WORKING WITH WORDPERFECT FILES**

Why Word Users Need to Understand How To Handle WordPerfect Documents.....	355
Recommend Approaches for the Occasional Need .....	355
Converting WP Documents to Word.....	356
Problems With The Foregoing Options .....	357
Recommended Option for You .....	358
Opening WP Documents in Word Errors .....	358
Cleaning Up A Document Word or WP Converts .....	358
Formatting Raw Text.....	362

## **CHAPTER 43 COMMON SPEED KEYS**

Speed Keys Commonly Used in Word.....	363
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# CHAPTER 1

# INTRODUCTION

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## Benefits of Word Processor Efficiency for Law Offices

### Ultimate Tool for Creating Work Product

Most legal services are 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 the legal profession is that clients are often unable to judge the quality of 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.

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 their "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 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 Word 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 yourself a grizzled veteran Word user.

## Self-Reliance

As a legal professional, 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.

## Unfortunately, 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 workarounds 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 **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 2013 manuals. 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.

# CHAPTER 2

# MANAGING DOCUMENTS

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## What Is Document Management?

Law firms and legal departments generate a huge number of documents and, as they accumulate, it becomes increasingly difficult to locate a specific one unless the organization has employed some form of Document Management. Document Management is defined as the process of naming, storing, archiving, deleting and finding documents.

## What Are Files and How Are They Stored?

In simple terms, a file is a single unit of related data or information and may be manipulated as a unit (i.e., a Word document). For example, a file can be deleted, renamed, moved and the like.

In a computer, a file system is the way in which files are named and where they are placed logically for storage and retrieval. The DOS, Windows, OS/2, Macintosh, Linux and UNIX-based operating systems all have file systems in which files are placed somewhere in a hierarchical (tree) structure. A file is placed in a folder (also known as a directory) or sub-folder at the desired place in the tree structure. Folders are really just containers which may be empty or hold files, other sub-folders or any combination thereof. Folders allow users to categorize, organize and segregate files. An electronic file system without folders would be equivalent to a paper filing system without folders. If every piece of paper were thrown into a single filing cabinet without folders, it would be quite difficult to find anything.

File systems also specify conventions for naming files. These conventions include the maximum number of characters in a name and which characters can be used. Finally, a file system also includes a format for specifying the path or address of a file through the structure of folders.

A file must have a unique name within a given folder. Some operating systems and applications (programs) help define files by giving them a particular file name suffix. The file name suffix is also known as a file extension.

## Disk Storage

Files and their file systems are typically stored on disks. There are two basic types of disk storage: removable storage (external hard drives, zip disks, rev cartridges, CDs, DVDs, etc.) and fixed storage (PC hard drives, file server hard drives). Removable media is portable and typically holds less data than fixed storage (which is not portable).

## Folder Structures Organization

In order to keep your files organized, it is imperative that you employ a logical folder system. Depending upon how your practice is organized, the following recommended system may not be optimal, but it works in most cases.

### Recommended Structure for a Legal Environment

We recommend that you organize your folders by matter type and then by client name. For purposes of this example, assume that your practice consists of Corporations, Estate Planning, Probate and Real Estate. First, create a main folder where all of your Word files will be stored (assume in this example that the S: drive is your server). Under S:\Documents, you'll want to create sub-folders for each practice area:

S:\Documents\Corporations

S:\Documents\Estate Planning

S:\Documents\Miscellaneous

S:\Documents\Probate

S:\Documents\Real Estate

Under each practice-area folder, you'll create additional sub-folders for each client name such as:

S:\Documents\Real Estate\Smith, John

S:\Documents\Real Estate\Rosedale, Meredith

If you conduct multiple transactions for a single client in the same area (i.e., you represent an individual in the sale of one house and the purchase of another), you might want to create separate sub-folders for each deal such as:

S:\Documents\Real Estate\Smith, John\Sale of 123 Maple St

S:\Documents\Real Estate\Smith, John\Purchase of 400 E Main St

The documents created for each transaction would then be located under the appropriate sub-folder. For example, the path and filename for the deed might be:

S:\Documents\Real Estate\Smith, John\Sale of 123 Maple St\2004-09-21 - General Warranty Deed.docx

In matters which require the generation of many documents which are of the same type, you may also want to create subfolders for each type of document. For example, in a litigation file, you may want to create additional sub-folders entitled letters, memos, pleadings, miscellaneous, etc. In this manner, documents are much easier to find. How to create these sub-folders, as needed, is discussed in greater detail below.

## Rules for Naming Files When Saving Length of Names

Windows permits names of up to 255 characters. This is a significant improvement over the DOS naming convention which was limited to 8 characters (excluding a 3-character file extension).

## Acceptable Characters

A file name may contain any of the following characters: A-Z 0-9 ! @ # \$ & ( ) - \_ ' { } ^ ,

## Unacceptable Characters

A file name may not contain any of the following characters: \* + = [ ] ; : " ~ < > ? / \ %

## Suggested File Naming Convention

So that your files are sorted chronologically, we recommend preceding each file name with the date that it was sent out (which is not necessarily the date it was created). File names would look like this:

2015-06-04 - Letter to John Smith Enclosing Draft Documents for Review.doc

2014-09-21 - General Durable POA for Elizabeth Riker.doc

## Searching for Documents

There are many ways to search for documents you've created in the past. The problem is that we often cannot remember the client a document was for or what we called the particular document we're searching for. In this case, it becomes extremely useful to be able to search for words contained inside the file. For example, you might need to search for all files on your server which contain the words "motion for summary judgment" AND "southern district of Ohio." With the proper search tools, you could find all files meeting that criteria in 2 seconds or less.

My favorites utilize 3<sup>rd</sup> party tools that will search many different types of files simultaneously (and quickly). I need to search Word, WordPerfect, Excel, PowerPoint, Outlook, PDFs, ZIP files, HTML, XML and many other types. Some of them are on my C:\ and some are on my server. The program I use (Copernic Desktop Search) will search for over 150 file types, regardless of their location and I can search by any criteria imaginable. Some good ones are as follows:

- **Windows Recommendation: Copernic Desktop Search<sup>1</sup>** - This has a 30-day free and starts at \$14.99 per year.
- **Mac Recommendation: HoudahSpot<sup>2</sup>** - This program is generally recognized as superior to Spotlight, although it uses Spotlight as its starting database. Also see Path Finder<sup>3</sup>.

---

<sup>1</sup> See <http://www.copernic.com/en/products/desktop-search/>

<sup>2</sup> See <http://www.houdah.com/houdahSpot/>

<sup>3</sup> See <http://www.cocoatech.com/pathfinder/>

# CHAPTER 3

# THE INTERFACE

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

## Overview

## Ribbons

Most commands can be found on Word's various ribbons. The ribbons are changed by clicking on different tabs.

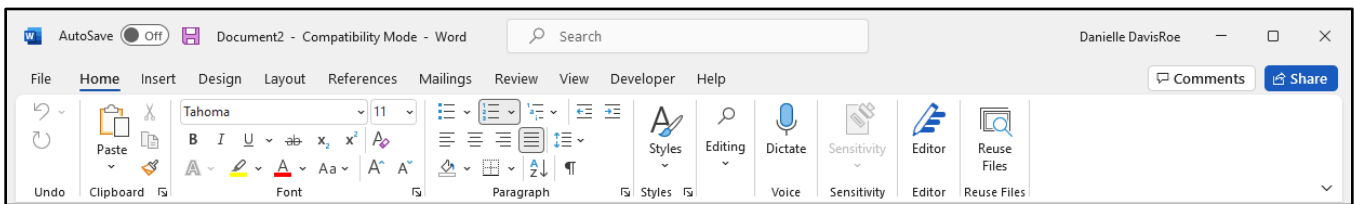


FIGURE 3-1

## Groups

Each ribbon is broken down into multiple groups, separated by vertical lines.

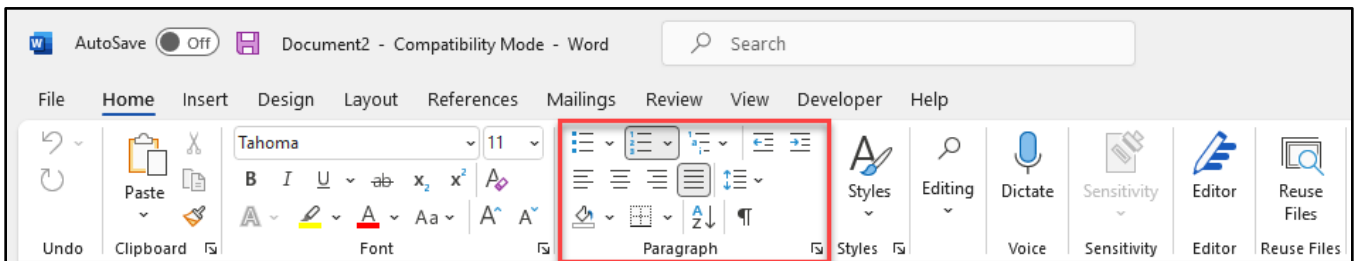


FIGURE 3-2

## Launchers

Many groups include launchers. These arrows, located in the bottom right-hand corner of the group, are used to open dialogs and panes with more advanced settings.

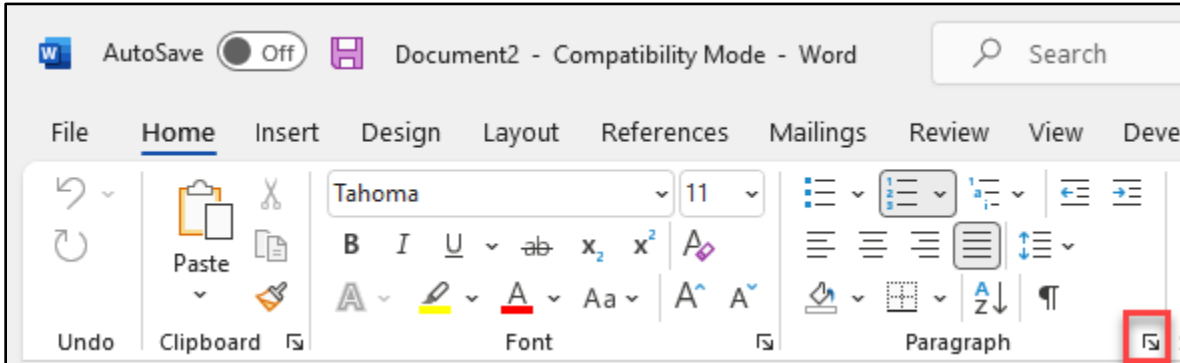


FIGURE 3-3

## Button Arrows

If you see a button that has a down arrow to the right or below the button, clicking on the arrow and *not* the button will give you more options.

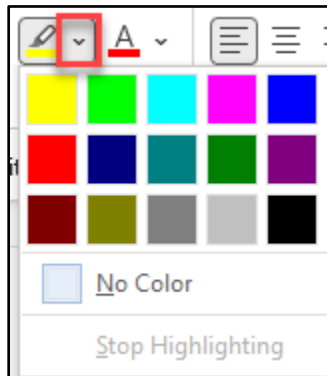


FIGURE 3-4

## Quick Access Toolbar

The Quick Access Toolbar (“QAT”) in 2013/16, appears above the ribbon and houses frequently used commands such as saved, undo, and redo. In 2019/21/365, it is hidden by default.

The QAT can be customized to include the commands you use most frequently. See page 101 for more details.

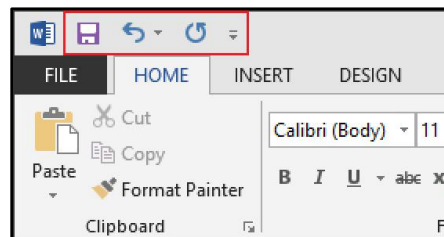


FIGURE 3-5

## Contextual Ribbons

Contextual ribbons appear based on what you have selected in the main Word document. For example, Table Design and Layout contextual tabs appear only if your cursor is within a table. The beauty of contextual tabs is that they appear automatically when you need them.

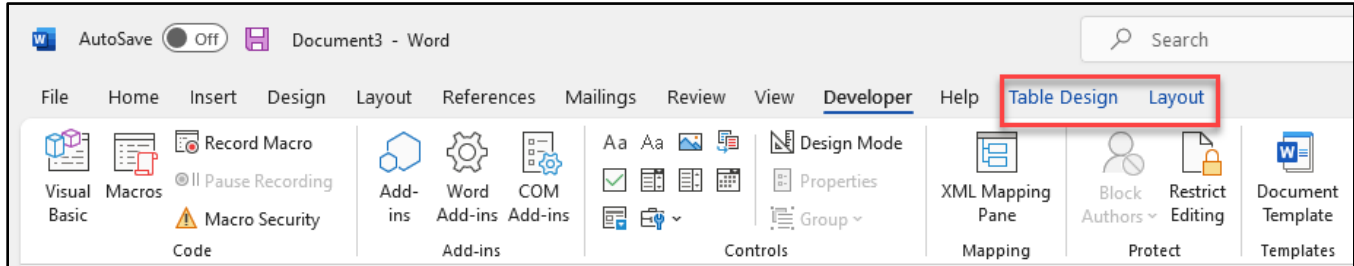


FIGURE 3-6

## File Menu

The File menu opens the Backstage view. It shows what you can do *to* a document, while the ribbons show you what you can do *in* a document.

## Word 2013/16/19

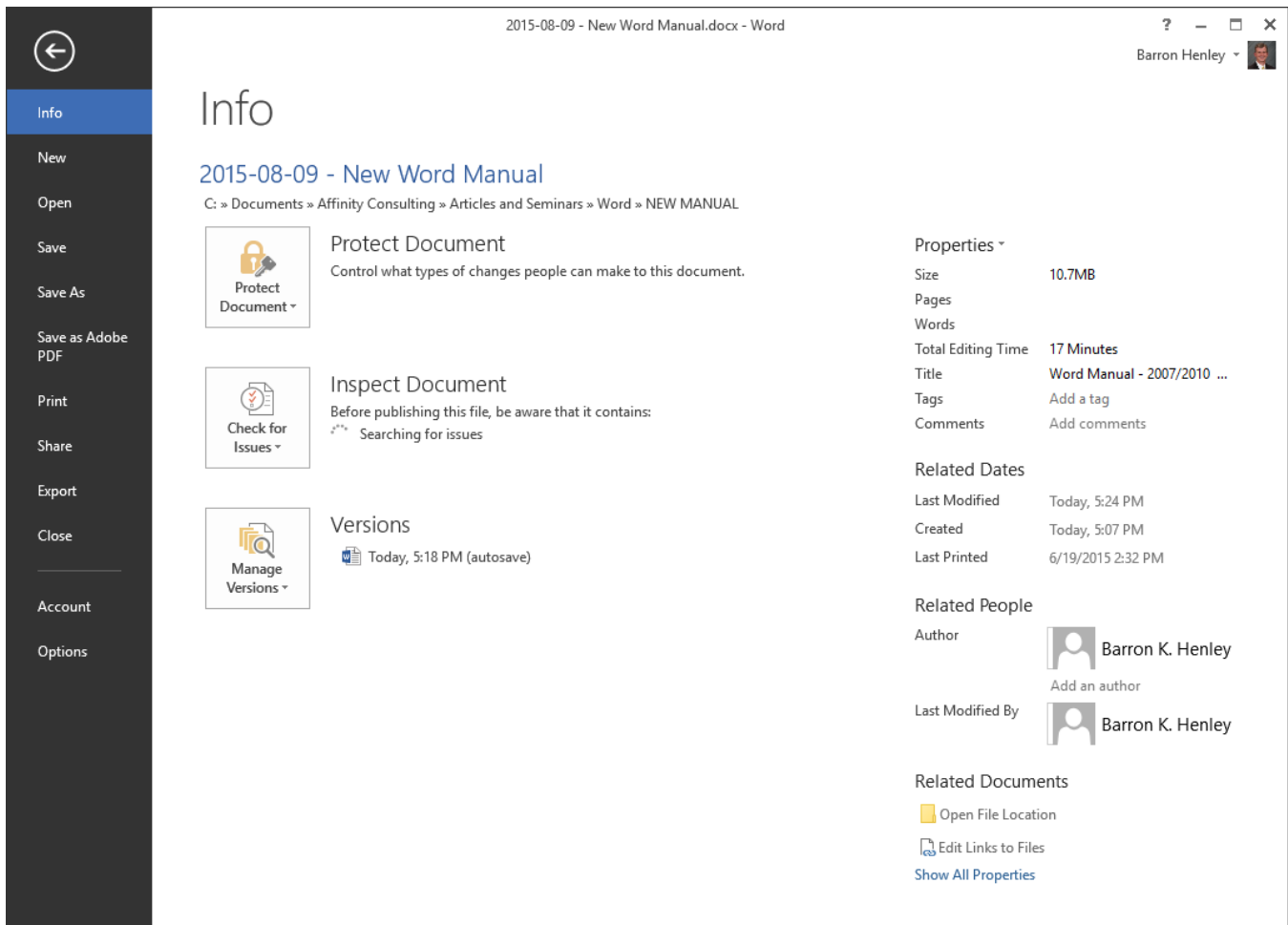


FIGURE 3-7

### File | Info

#### Info: Convert Button

If you see the **Convert button**, then your document either has not been saved yet or has been saved in the old file format (.doc). Clicking the **Convert button** will not convert your document to the new file format, but it will enable the additional features. Having explained this, the feature is mostly useless and may cause your document formatting to change.

#### Info: Protect Document Button

This button gives you options to do the following:

- **Mark As Final:** Makes the document read-only so users cannot accidentally over-write it.
- **Encrypt with Password:** Allows you to require a password for the document to be opened.
- **Restrict Editing:** Options for locking down the document and preventing editing.
- **Restrict Permission by People:** Using this requires that you sign up for a free service from Microsoft called Information Rights Management. You can click on the option to learn more about it, but we're not going to cover it in this manual.



- **Add a Digital Signature:** Of course, this requires that you own a digital signature, and that topic is beyond the topical coverage of this manual.

Info: Check for Issues Button

This button allows you to:

- **Inspect Document:** This is a way to remove hidden properties, personal information and other metadata from the file.
- **Check Accessibility:** Checks the document for content that people with disabilities may find difficult to read.
- **Check Compatibility:** Checks for features you may have used in the document which are not supported by earlier versions.

Info: Version History

Word automatically saves all open documents every 10 minutes by default (you can change this to a shorter interval if you want). This is a new feature which allows you to browse the auto-saves Word has executed which can be extremely valuable if you close a file without saving it. It also shows you all of the current versions of the document it has saved which you are presently working on.

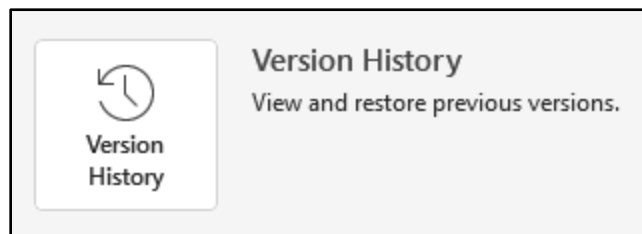


FIGURE 3-8

Info: Manage Document Button ➔ Recover Unsaved Documents

Word also automatically saves documents you told it not to save. If you accidentally clicked the Don't Save button, Word will capture the file for you anyway. If you want to recover it, all you have to do is click the **Manage Document button** as shown in Figure 3-9 below.

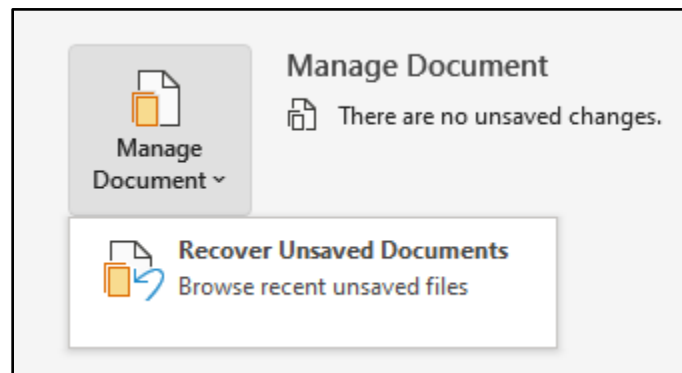


FIGURE 3-9

## File | Open

The most recent documents that you have opened are located under **Open**.

## File | Share

Under the **Share feature**, you can invite people to see your document, email your document, present your document online, or post your document to a blog.

## File | Share | Email

You have the option to attach your document to an email, send your document as a PDF, send your document as XPS, or send your document as an internet fax. If your document is stored in a shared location, you can also send your document as a link.

## File | Export

This allows you to create a PDF or XPS document or change the file type to a variety of different file types. These file types are not covered by this manual.

## File | Account

This gives you the option to change the color theme of Word, sign into your Office account, check for Office updates, and gives you information about Word.

## Word 365 File Menu

As of the time of publication, Word for Microsoft 365 looks like this. The options under the File menu in Word 365 are the same as Word 2013/16/19, except for the following.

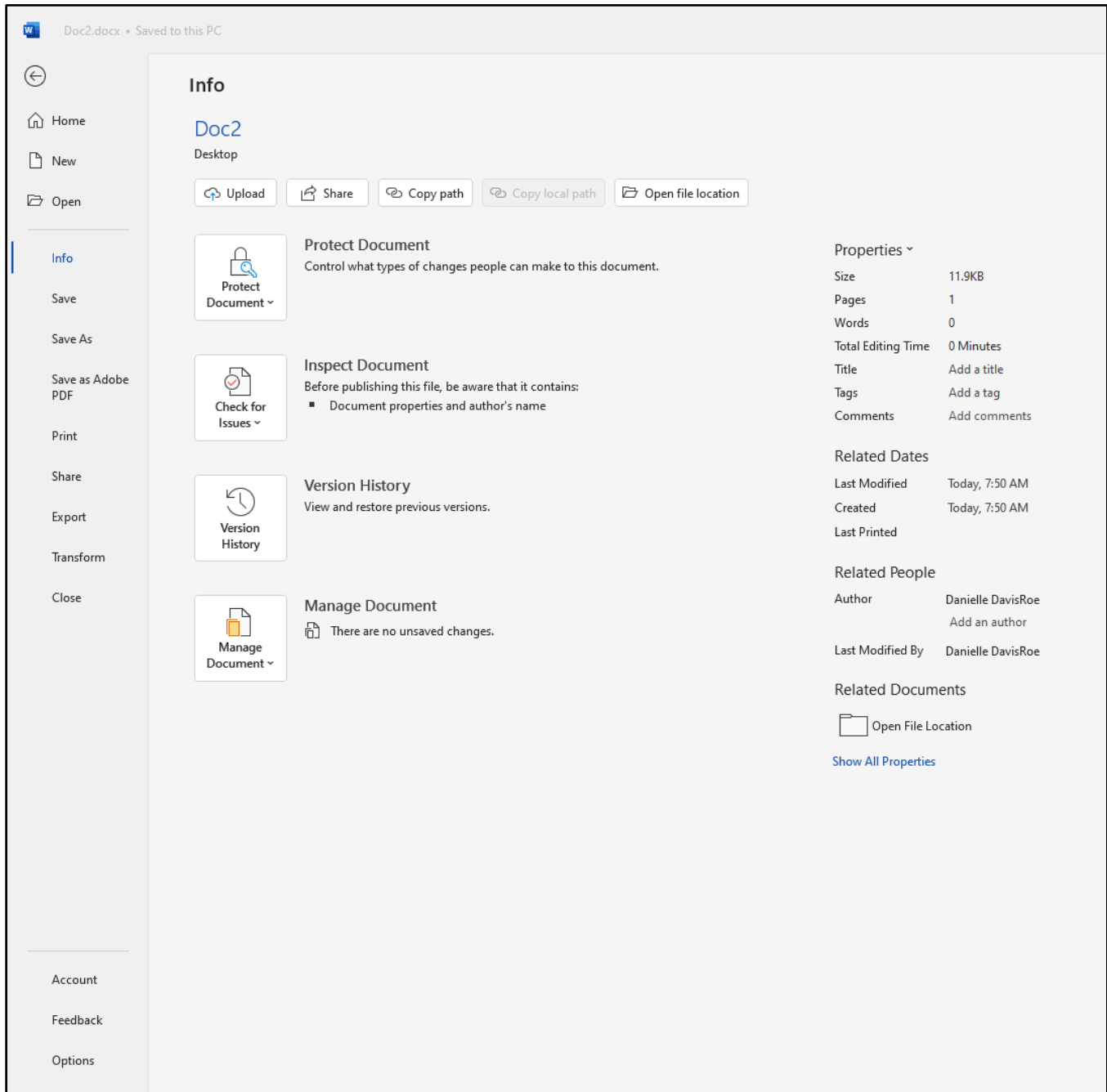


FIGURE 3-10

### File | Info

The options under this are the same as in Word 2013/16/19 (see above). However, there is a new additional button called **Manage Document**. Here, you can recover unsaved versions of the document.

## File | Transform

This is one method of converting your Word document to a Microsoft Sway web page. Sway is included with many Microsoft 365 plans and for more information on it, see <https://sway.office.com/>.

## File | Feedback

This is a method for sending feedback to Microsoft.

## Collapsing White Space Between Pages

If you hover your mouse over the gray line between pages and double-click, it will collapse the headers/footers so they're no longer visible. This is a feature designed to make it easier for you to read the document. You can't see the headers and footers, but they will still print. To switch back and make the headers/footers reappear, just hover over a page break (now represented by a thin line on the screen between pages) and double-click again. Note that once you turn this feature on, it's a global setting so every document you open will look the same until you turn it off again.



FIGURE 3-11

## Show Ribbon Options

The ribbon can be collapsed down to just the tabs or hidden all together if you're looking to decrease the amount of space it takes up when it isn't in use.

In Word 2013/16/19, click on the **Ribbon Display Options button** in the upper right-hand corner of the screen. Select **Show Tabs** to hide the ribbon but keep the tabs visible. When you click on a tab, it'll show the ribbon. When you click back in the document, the ribbon will disappear again.

Alternatively, select **Auto-hide Ribbon** to hide the tabs as well as the ribbon. Click at the top of the screen to show the tabs and ribbons.

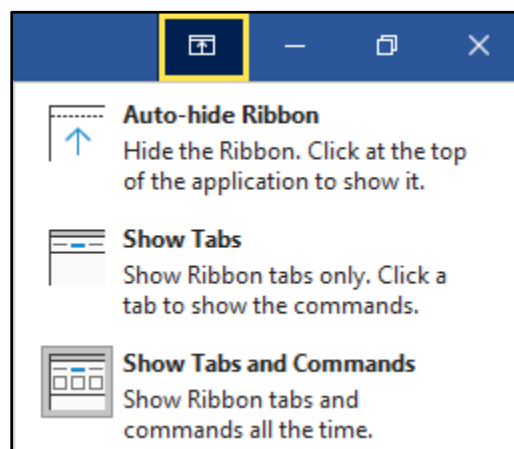
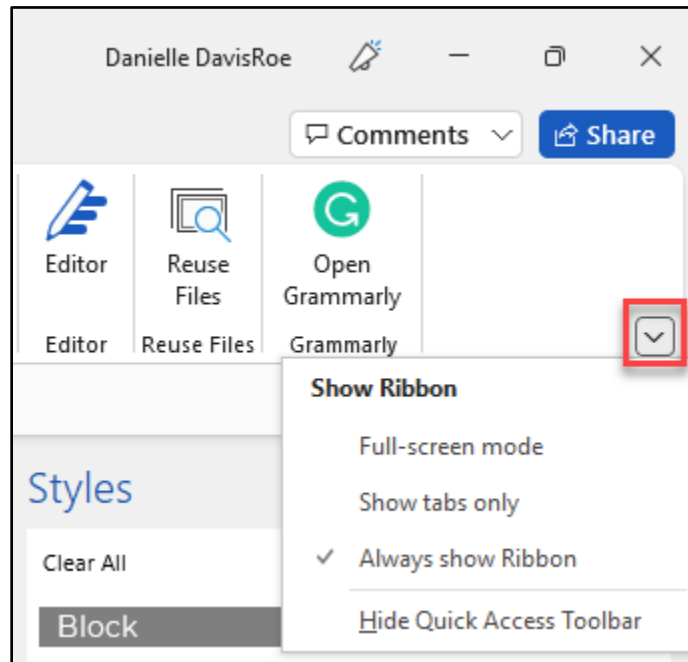


FIGURE 3-12

In Word 2021/365, click on the **Ribbon Display Options button** in the bottom right-hand corner of the ribbon. Select **Show tabs only** to hide the ribbon but keep the tabs visible. When you click on a tab, it'll show the ribbon. When you click back in the document, the ribbon will disappear again.

Alternatively, select **Full-screen mode** to hide the tabs as well as the ribbon. Click at the top of the screen to show the tabs and ribbons.



# CHAPTER 4

## CURRENT FILE TYPES

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Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

### Description of the Current File Types

Word 2007 introduced four (4) new types of files .docm, .docx, .dotm and .dotx (designated by Microsoft as the "Office XML Formats"). These file types are carried over to subsequent versions of Word as well. The first two are document files, the last two are templates. The difference is in whether or not they can contain macros. .docx and .dotx cannot contain macros. .docm and .dotm can contain macros. The ability for macros to be stored in the old file types opened the door to many types of "macro viruses." By creating files which cannot contain macros, you gain a significant measure of protection against such things. For the most part, lawyers will be using .docx files.

### Benefits of the Current File Types

Without going into a very technical description, the new formats are much less likely to get corrupted, and they're smaller than the old file types (in terms of bytes). The text of the new documents is stored as XML<sup>4</sup> which is effectively plain text. The exclusion of macros offers a significant measure of protection against "macro viruses" and the text being stored as XML further reduces security concerns. This additional security means that the new files can pass through corporate firewalls without being intercepted as a security risk. Finally, the XML format allows any application supporting XML to access and work with data in the new file format. The application does not need to be part of the Microsoft Office system or even a Microsoft product. This was a distinct shortcoming of the .doc file type since the format is proprietary to Microsoft and they do not release their source code to the public. For Microsoft's explanation of the benefits of the new file formats, please see <http://tinyurl.com/2j2g8s>.

### Always Convert Old Files to New Format

Opening an old .doc file in Word doesn't automatically convert it to the new format. However, you *need* to convert them for all of the reasons outlined above if you intend to use an old .doc files as a template for a new document. Conversion is a somewhat inaccurate term because Word really makes a copy of the old file in the new format and leaves the old file alone. Here's an easy way to convert an old file.

1. Open an old .doc file in Word.
2. Click the **File menu** → **Info** → **Convert button**.

---

<sup>4</sup> XML stands for Extensible Markup Language. It is a programming language developed by the World Wide Web Consortium which is an "open" standard (not proprietary to any one company) accepted around the world. XML is designed to facilitate the sharing of structured data (such as text in a Word document) across different information systems, particularly via the Internet.

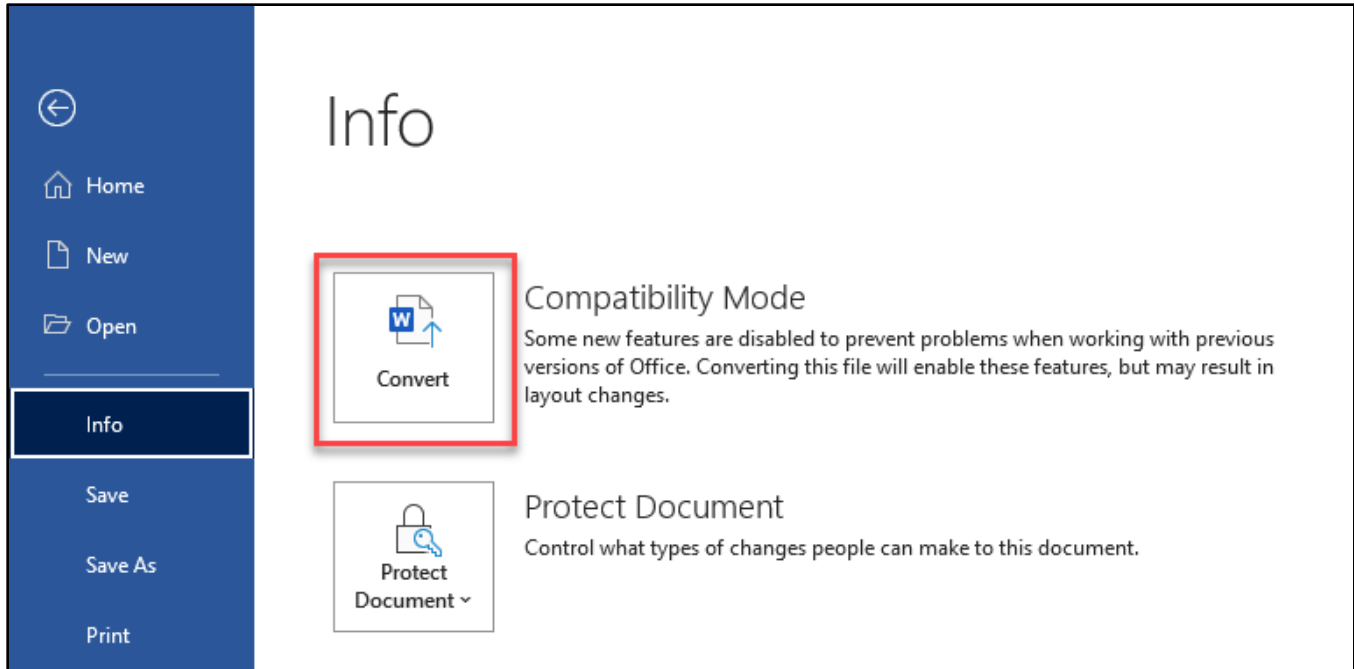


FIGURE 4-1

3. Click **OK**.

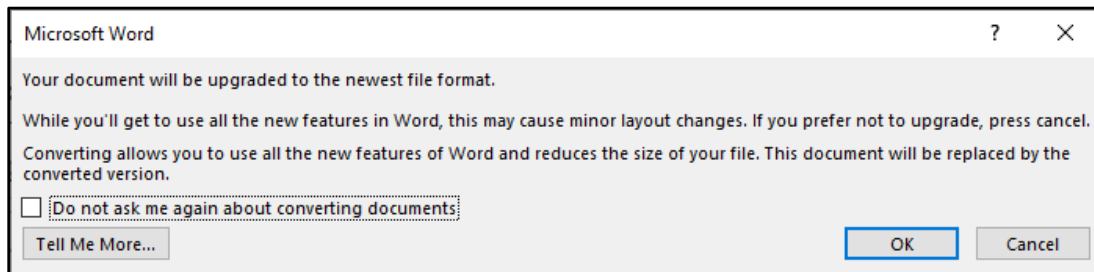


FIGURE 4-2

4. Now just save the converted document and it will automatically create a .docx version of your original .doc file. The .doc file is still there, but we'd recommend deleting it once the new version is created.

# CHAPTER 5

## NORMAL TEMPLATE

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

### Introduction to Templates

Unless you create a new document by opening an existing document and saving it as a new file, new files are all based upon templates. Unless otherwise specified, when you open a new blank document from the File menu, it will be based on the Normal template.

Templates store formatting such as paper size, margins, page orientation, default formatting, and more. Template can also store commonly used text, making it easier to find the language you need.

### Normal Template

Much of your Word customization is stored in it the Normal Template, including AutoText entries, keyboard shortcuts, and macros. If the Normal template file is deleted, Word will create a new one the next time you open Word, but you will lose any customizations saved in Normal template.

To determine where Word is storing your normal.dotm file, click the **File menu** → **Options** → **Advanced** → **File Locations** button under the **General** heading.

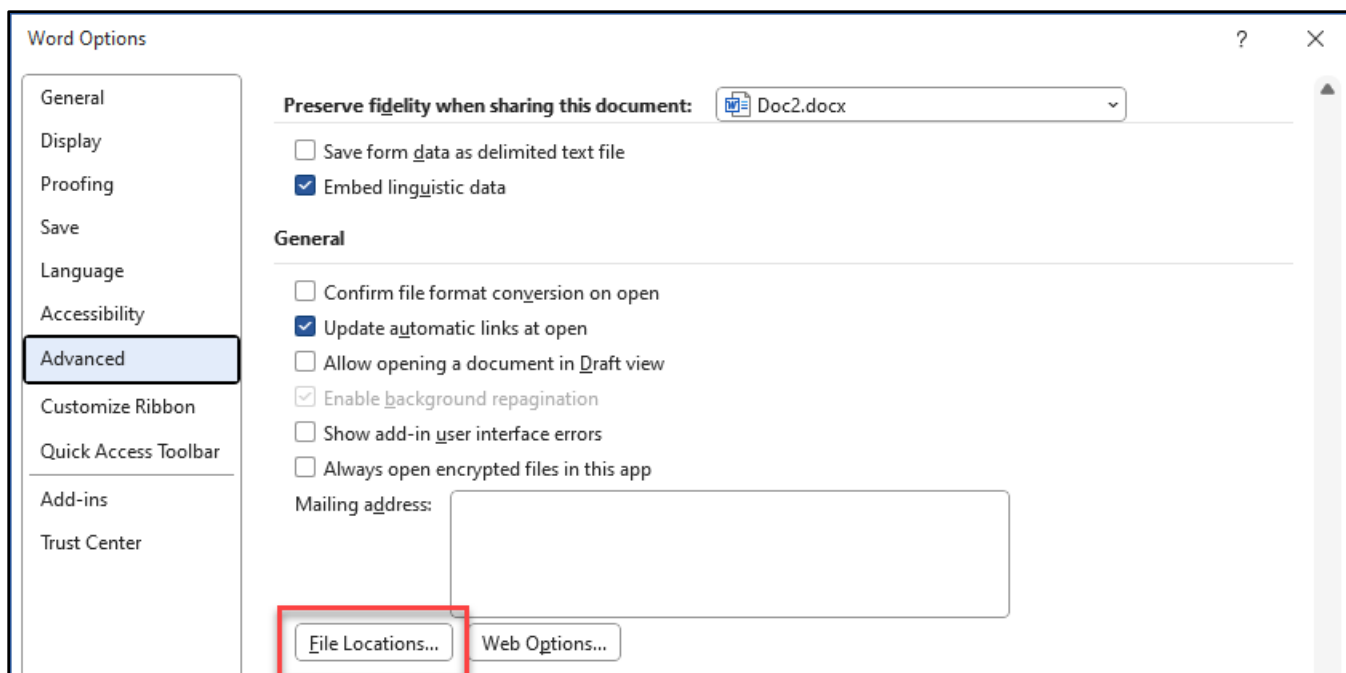


FIGURE 5-1



Click on **User Templates**. Then click on **Modify**, to where your Normal template is stored.

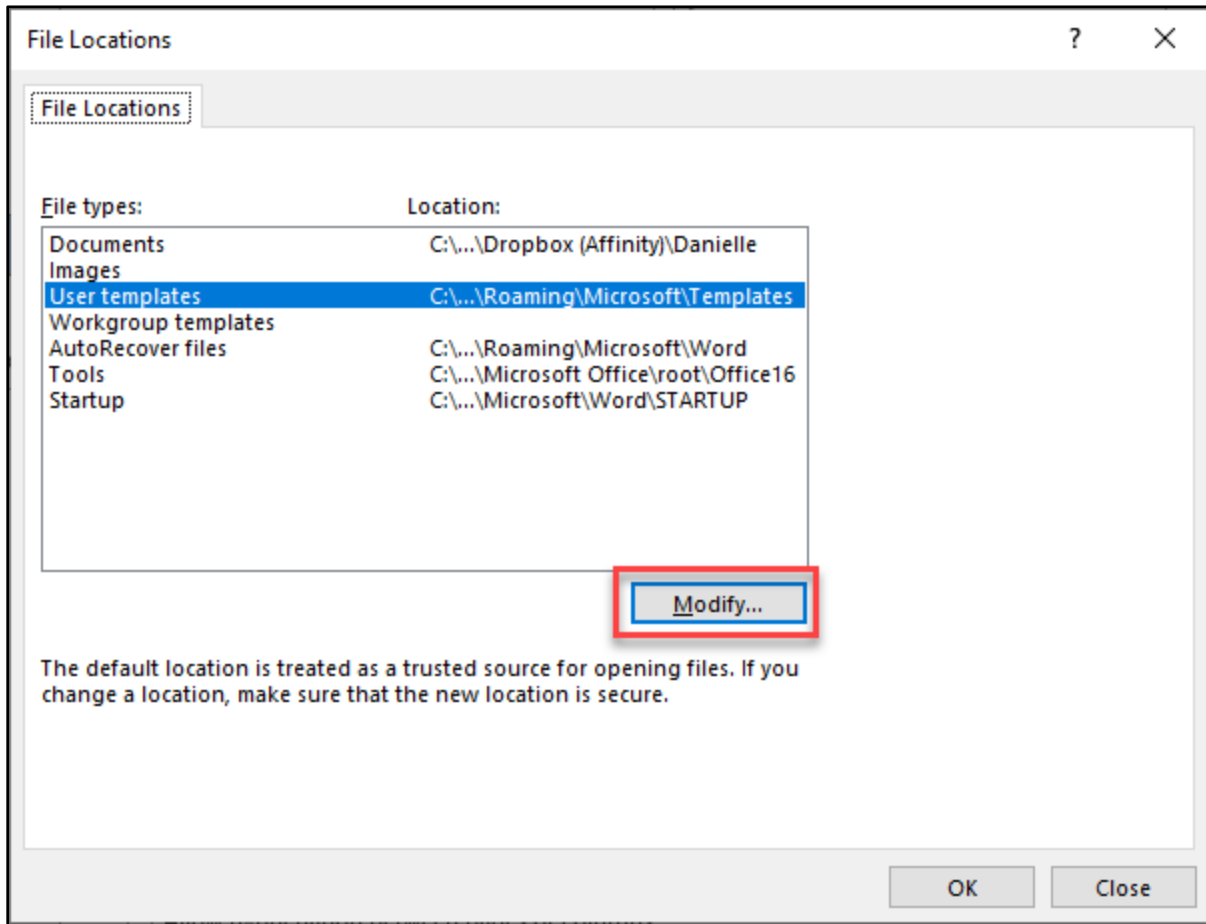


FIGURE 5-2

# CHAPTER 6

## NEW FEATURES

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Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

### Introduced in Word 2013

#### New Read Mode

Read Mode has been significantly changed to make reading documents easier.

#### Resume Reading

When you open a Word document that you previously opened, Word will ask you if you want to pick up where you left off. It will take you to the page that you were on the last time that you closed the document. This is particularly helpful if you are in the middle of editing a large document.

#### Simple Markup

Simple Markup is a new review view. It shows you fewer changes in the document, marking the ones that it does not show you with a line in the margin. The document may be easier to read in this view, but it is not particularly helpful if you are trying to see exactly what changes were made by another person.

#### Reply to Comments and Mark Them as Done

You can now reply to comments made by other people. You can also mark comments as done. To mark a comment done, simply right-click the comment balloon and choose "Mark Comment Done."

#### Open and Edit PDFs

You can now open and edit .pdf files in Word. The conversion from PDF to Word is imperfect, but it gives you the ability to alter a .pdf file if you are unable to get a Word copy of the file and you need to make changes.

#### Design Ribbon

The Design ribbon brings together style options in one ribbon. You can also preview the document before actually applying a style to the entire document.

#### Lock on Track Changes

You can lock on the track change feature. This minimizes the chances that someone will make changes to the document without the changes being tracked. With the correct password, users can turn off track changes.

## Collapse and Expand a Document

You can expand or collapse parts of a document. This allows you to collapse all parts of a document except for the part that you are working on. To use this feature, your document must use Word's built-in heading styles. Once a heading style is applied to a paragraph, a small triangle will appear in the margin when you hover over the paragraph. Click the triangle to expand and collapse sections of the document.

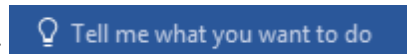
## New Landing Page

When you open Word, you no longer land on a blank document. Instead, Word lands on the "New" screen. The New screen provides you a list of templates from which you can create a new document.

## Introduced in Word 2016

### Searching for Commands

In Word 2016 and 2019, at the top of the Word screen, you'll see this:



Type what you want to do in plain English.

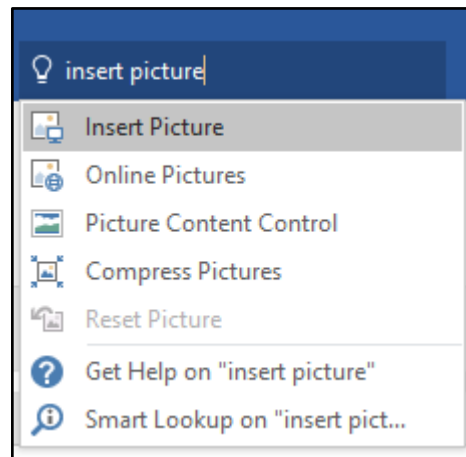


FIGURE 6-1

## Smart Lookup

In Word 2016 and 2019, select a word or phrase, right-click it, and choose Smart Lookup.

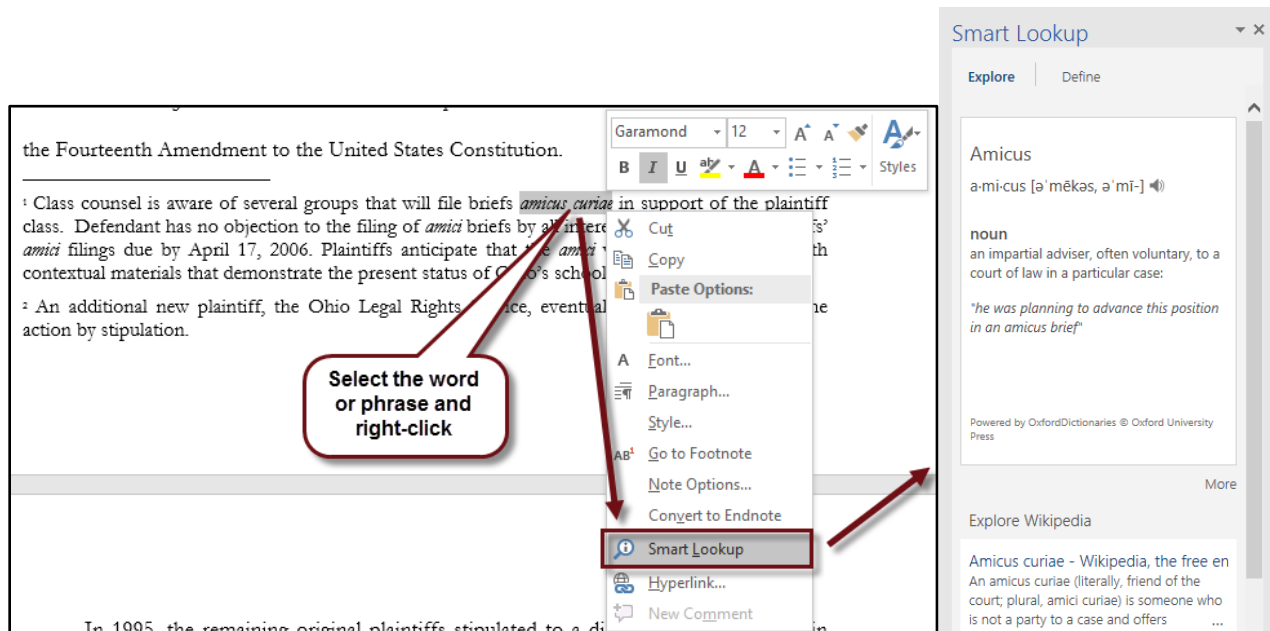


FIGURE 6-2

## Introduced in Word 2019

### Sharing and Co-Editing Documents

This feature existed in earlier versions of Word, but it's easier to use now. To share a document, you just click the **Share** button in the top, right-hand corner. If the document isn't already saved in OneDrive, it will prompt you to do so (it can't be shared without being in OneDrive). Now you can share it with others via their email address. After a document is shared, you'll be able to work on the file at the same time the people you've shared it with are. Further, you'll also be able to see who is working on the document with you and where.

### Making Documents Easier to Read

This feature allows you to change the way the documents look in Word without changing the actual formatting of the document. Just click the **View ribbon ► Immersive Reader button**. This will open the Immersive Reader ribbon which gives you many options for changing how your document presents on screen.

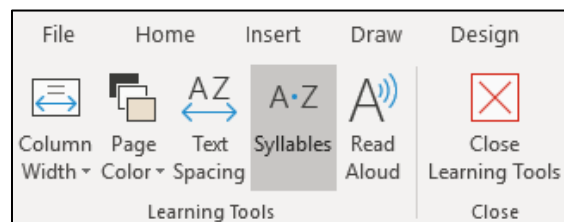


FIGURE 6-3

## Real Aloud Button

This button is in the toolbar shown in Figure 6-3 and also in the **Review ribbon**.

## Draw and Ink

There's a new ribbon which allows you to draw, annotate or write in a Word document if you have a touch-enabled device (PC, tablet, etc.). You can use your finger, a digital pen or your mouse. All of these tools are in the Draw ribbon shown in Figure 6-3 below.

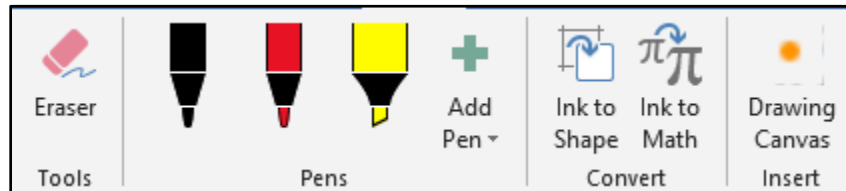


FIGURE 6-4

## View Pages Side by Side

You'll see the new button under the **View ribbon**. Once you're in Side to Side view, you'll see a new button called Thumbnails (see Figure 6-6) which allows you to quickly navigate to other pages.

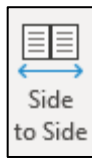


Figure 6-5



Figure 6-6

## Introduced in Word for Microsoft 365

Microsoft updated the ribbon icons in Word for Microsoft 365. The buttons work the same, but the icon looks a little different - as seen in this manual.

## Dictation

Dictation is available from the **Home ribbon** → **Voice group** → **Dictate button**.



FIGURE 6-7

Click the button to start dictating. To pause dictation, click on the microphone button on the box that appears at the bottom of your screen. From the gear icon, you can turn auto-punctuation on and off, change languages, and filter out “sensitive phrases.”

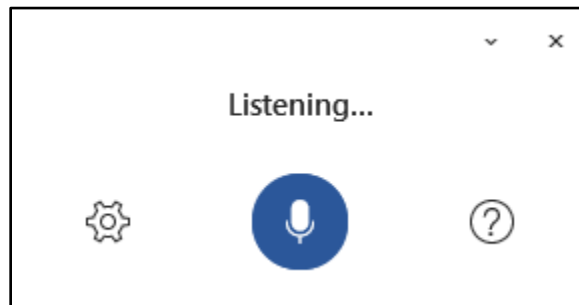


FIGURE 6-8

## Better Help

### Ribbon

Click on any of the button in the **Help ribbon** to get help that includes screenshots and short videos.

### Search Box

The Tell Me Box of 2016 has been replaced with a **Search box**. It works the same, it's just in a slightly different position (it is now above the tabs) and has a new name.

## Text Predictions

Word will make text predictions as you type. They'll appear in gray to the right of the cursor. To insert the predicted text, hit the tab key. Otherwise, just keep typing the text predictions will disappear.

# CHAPTER 7

# DEFAULT SETTING

# CHANGES FOR WORD 2013

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

In General

**NOTE** that you get to all of the following screens by clicking the File menu → Options.

Options → General

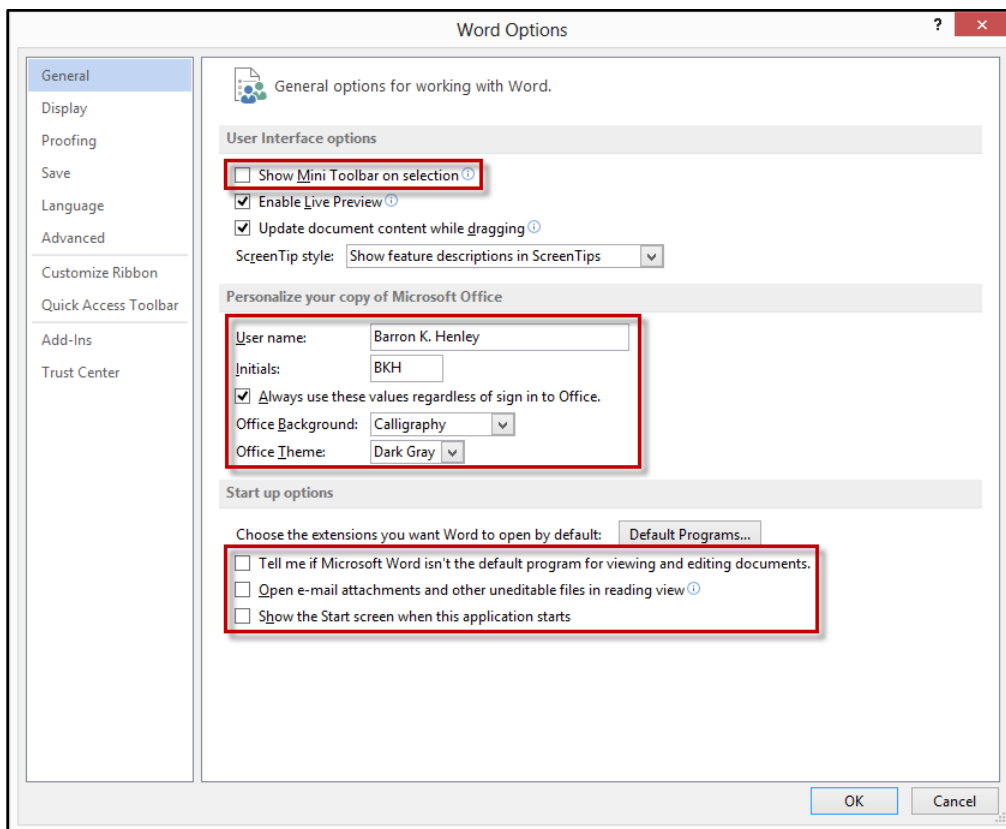


FIGURE 7-1

- **Show Mini Toolbar on selection:** This controls whether the mini toolbar appears when selecting text. Uncheck this box to prevent the mini toolbar from popping up and covering part of the document.

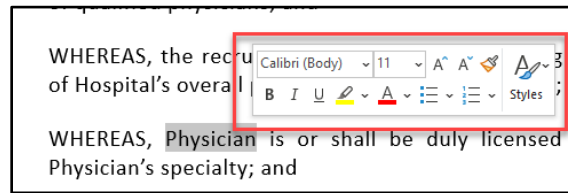


FIGURE 7-2

- Make sure your name and initials are in the **User name** and **Initials boxes**. Check **Always use these values regardless of sign in to Office** to use the values entered despite how your Office account may be setup.
- **Office Background:** the background a graphic that appears at the top, right-hand corner of the Word screen. Most users select **No Background**.
- **Office Theme: White, Dark Gray, and Black** change the bulk of the screen to the corresponding color. **Colorful** changes the bar across the top to the color associated with that program (blue for Word and Outlook, green for Excel, etc.).
- **Tell me if Word isn't default program for viewing and editing documents:** When checked, if another program is set as your default program for editing documents, Word will alert you when opening Word. If you'd prefer not to receive such an alert, uncheck this box.
- **Open e-mail attachments in Reading View:** When checked, Word documents attached to emails will open in Reading View. If you do not like the reading view, uncheck this box.
- **Show the Start screen when this application starts:** The start screen is the full screen template selection screen that opens whenever you open Word. If you would prefer to go directly to a blank document when you open Word, uncheck this box.



## Options → Display

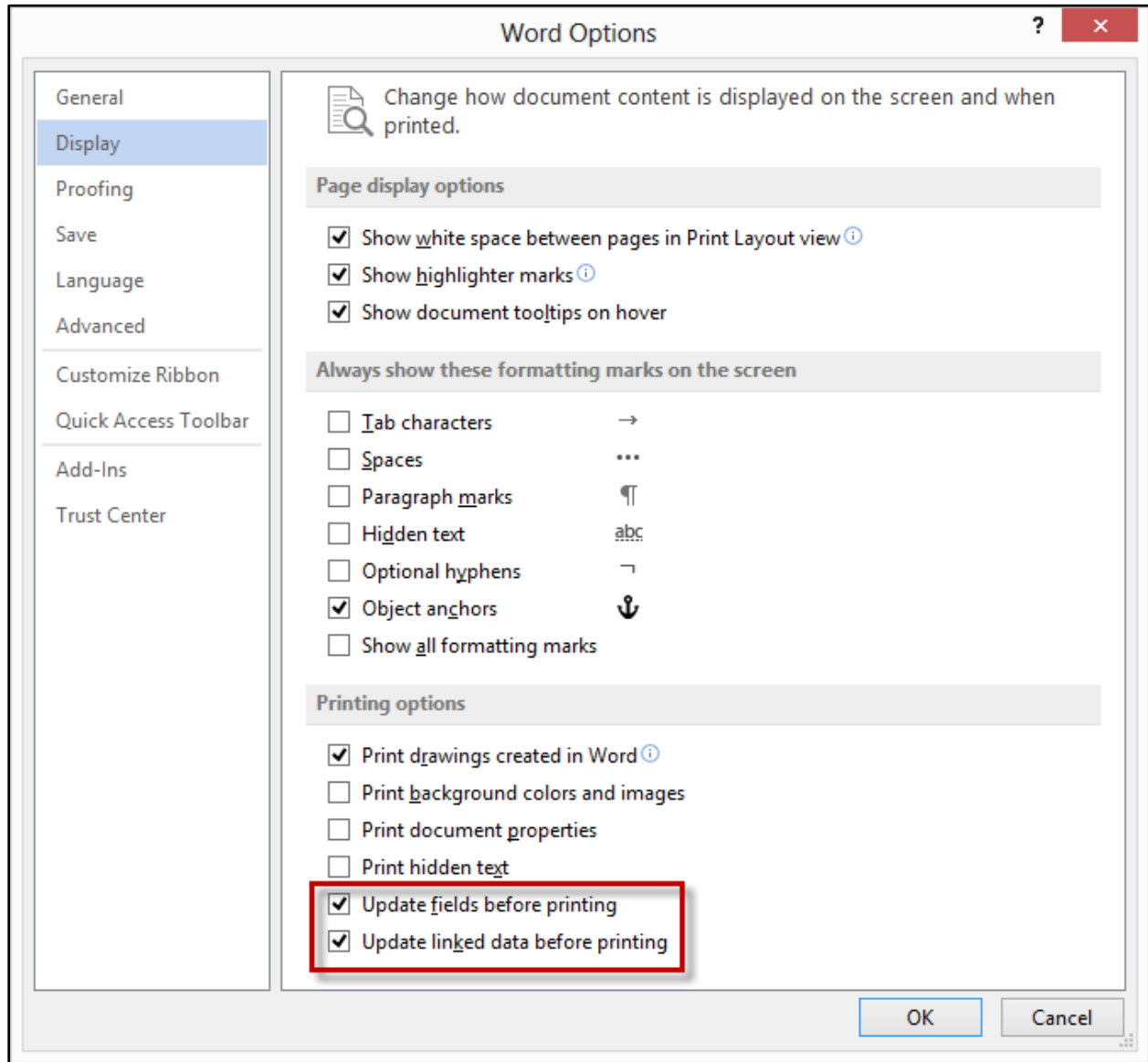


FIGURE 7-3

- Check **Update fields before printing**. Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.
- Check **Update linked data before printing**. This will make sure that all linked files are updated before printing.

## Options → Proofing

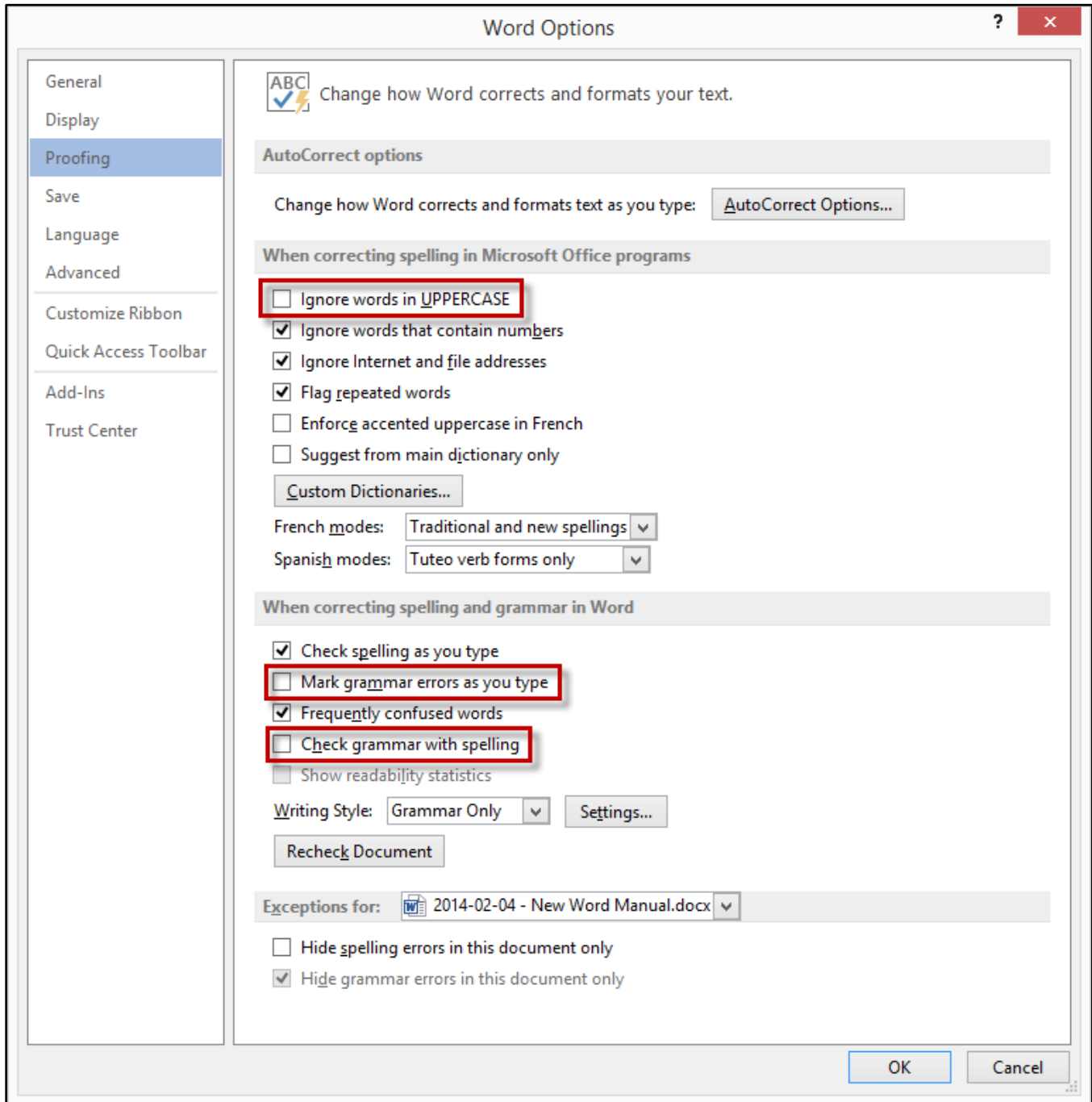


FIGURE 7-4

- Uncheck **Ignore words in UPPERCASE**. Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.
- Uncheck **Mark grammar errors as you type**. This will eliminate the green squiggly lines in the document.

- Uncheck/Check **grammar with spelling**. Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

## Options ➔ Proofing and Autocorrect

Next, go to **Proofing** and click on **Autocorrect Options** button. This will launch the **Autocorrect Options dialog**.

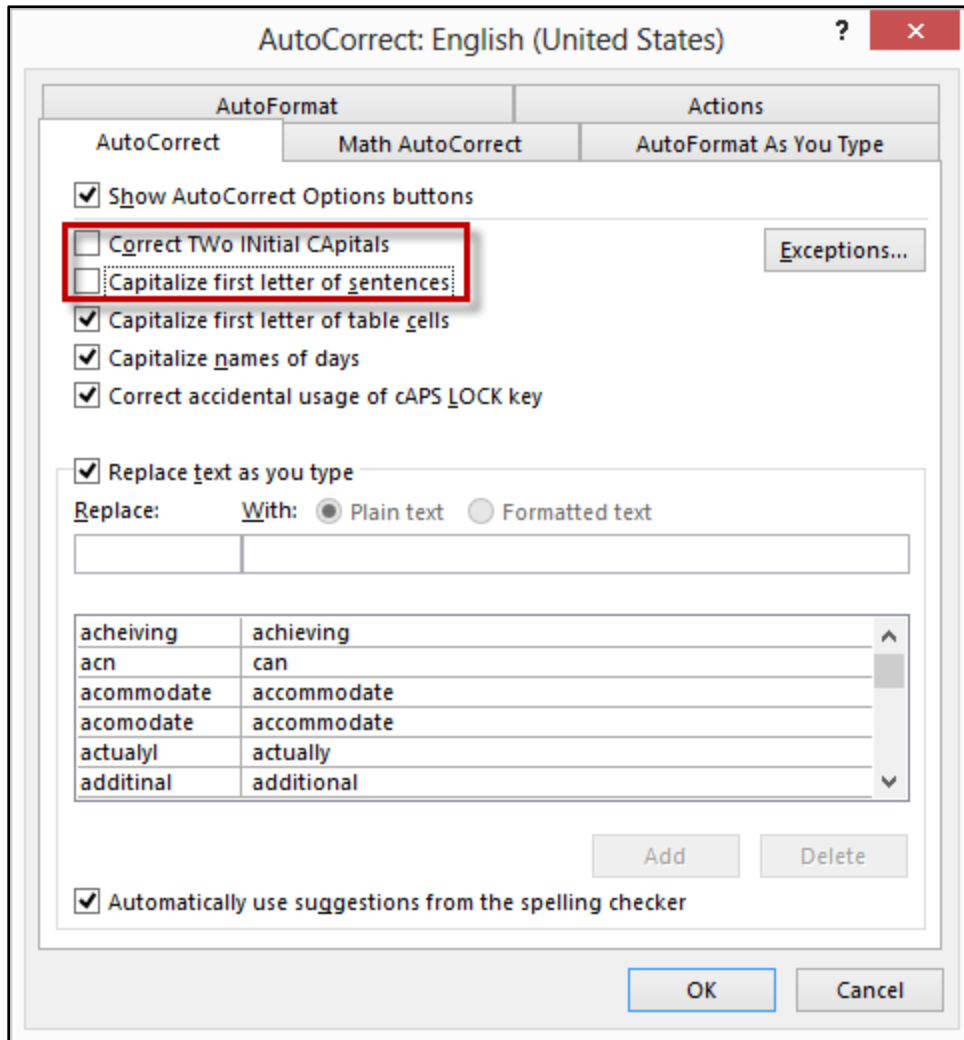


FIGURE 7-5

Uncheck **Correct Two Initial Capitals** and **Capitalize first letter of sentences** as most people find that annoying because they MEANT to do it (IDs or cc:). **Note:** you can also delete the AutoCorrect entries in the list at the bottom of the dialog which replaces (c) with © and (r) with ®.

Next click on the **AutoFormat As You Type** tab.

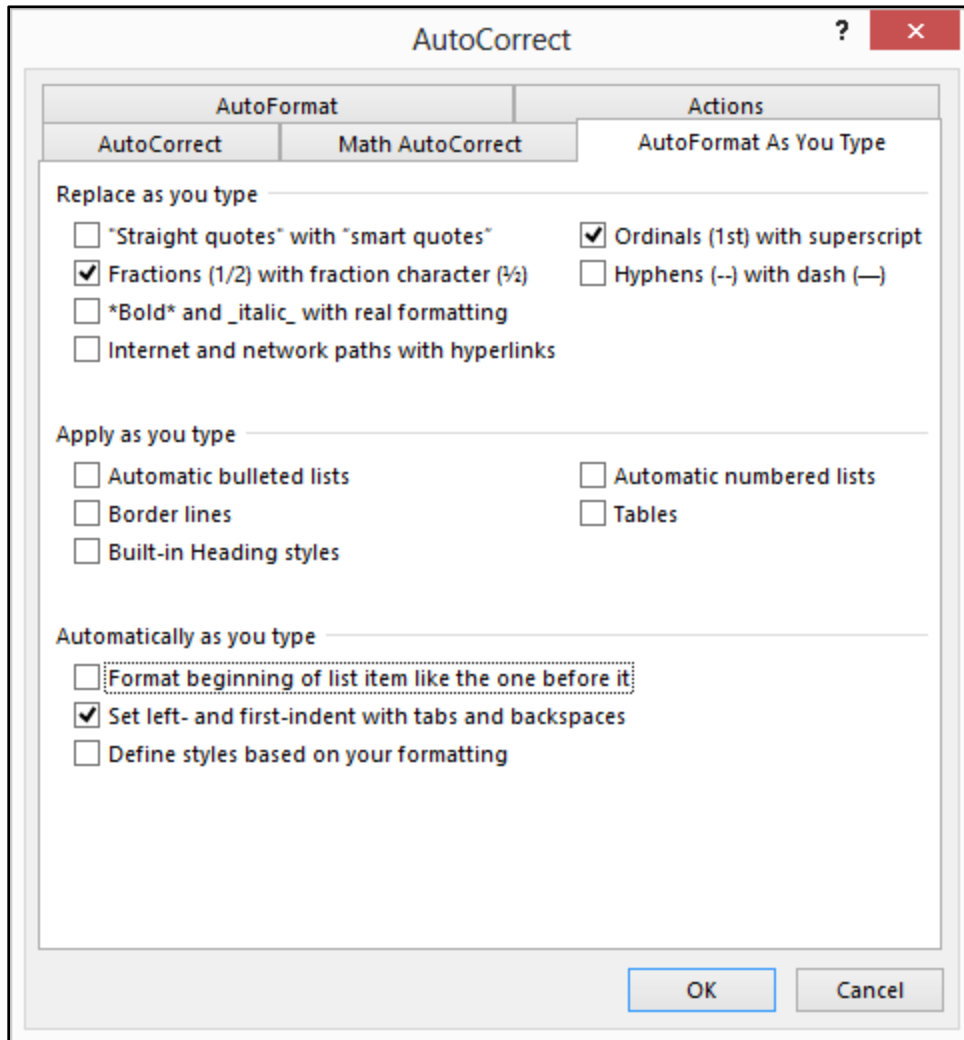


FIGURE 7-6

Uncheck everything except **Ordinals**, **Fractions** and **Set left and first indent with tabs and backspaces**. Optional items include checking **Internet and network paths with hyperlinks** will create clickable hyperlinks to internet addresses, so that a person opening the document can click on the link and go to the web address right from the document. You might also check the **Straight quotes with smart quotes** but keep in mind that this may result in your quotation marks getting converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

Be sure to uncheck everything else of this page!! The **Apply as you type section** causes Word to guess what is being typed and start inserting bulleted lists and tables on its own without any prompting to do so. Also be sure to uncheck **Define styles based on your formatting**. This option causes Word to create styles on its own.

Finally, click on the **AutoFormat** tab.

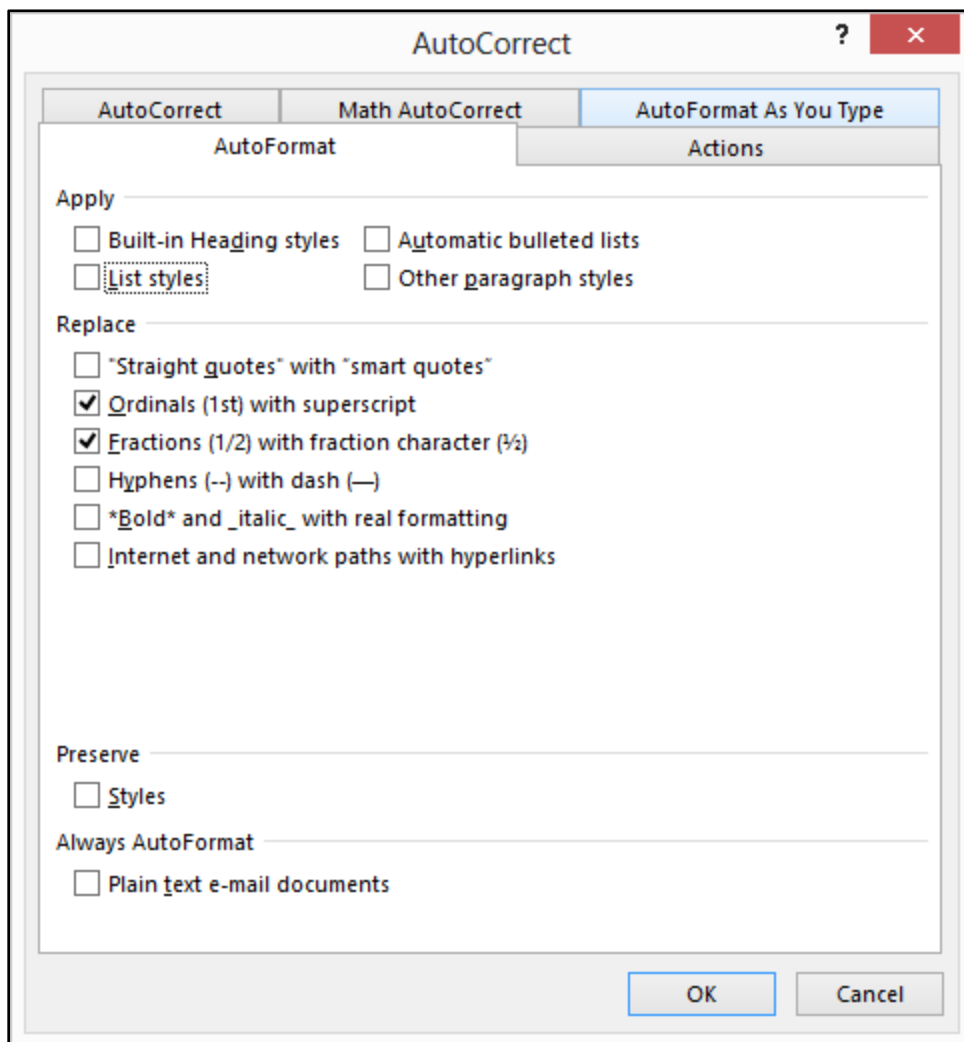


FIGURE 7-7

Make these options match the **AutoFormat As You Type** options.

At this point, make sure to click the **OK** button or all of the changes will be lost.

## Options → Save

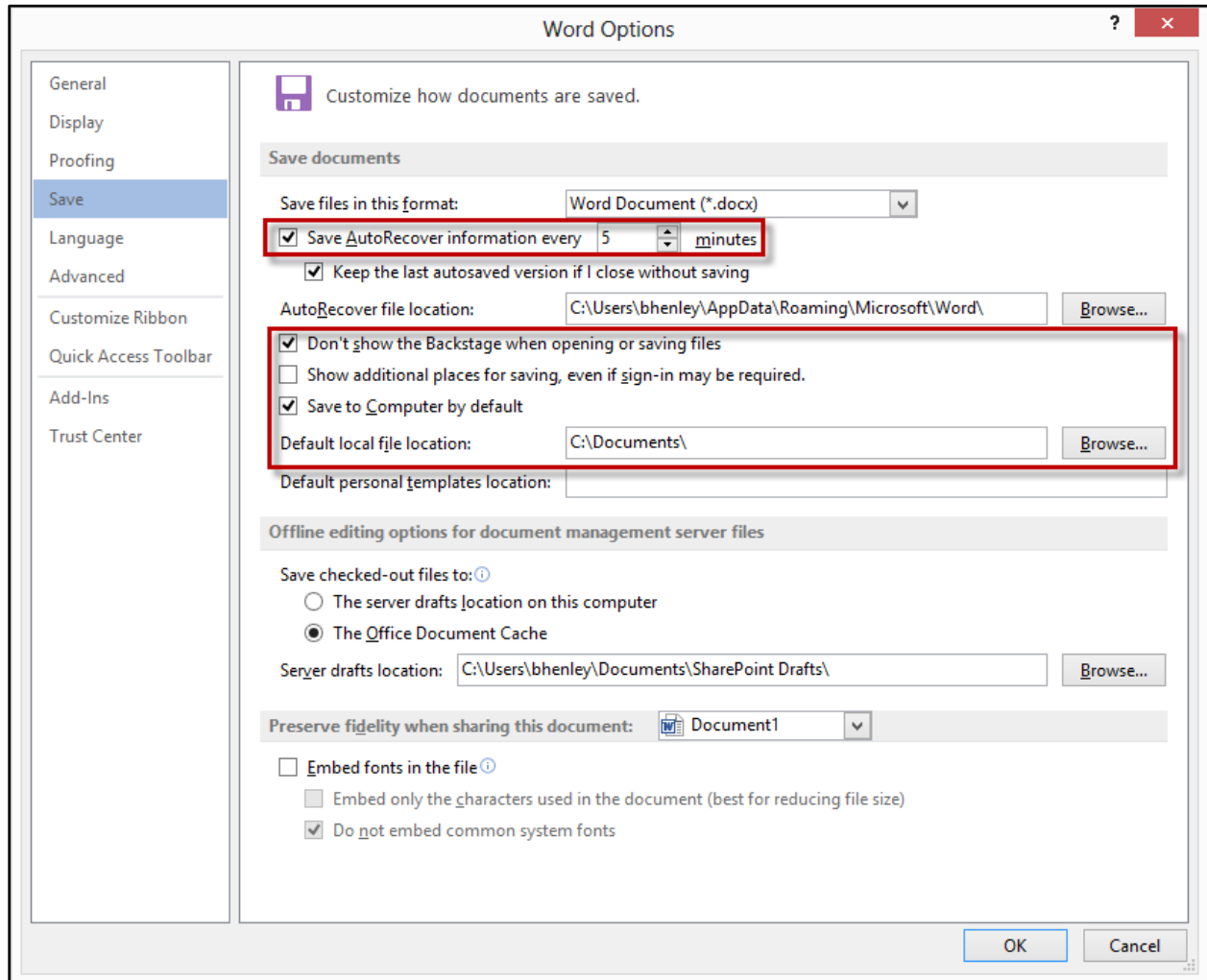


FIGURE 7-8

- **Save AutoRecover information:** Reduce this to **5 minutes** rather than 10 minutes. More frequency is a good thing.
- **Don't show the Backstage when opening or saving files:** If you want Word 2013 to behave like its predecessors when you open or save a file, then check this box.
- **Show additional places for saving, even if sign-in may be required:** This is just a waste of space on your save screen, so clear this box.
- **Save to Computer by default:** Microsoft really wants you to save everything to OneDrive and you probably don't want to. Therefore, check this box.

## Options ➔ Advanced ➔ Editing Options

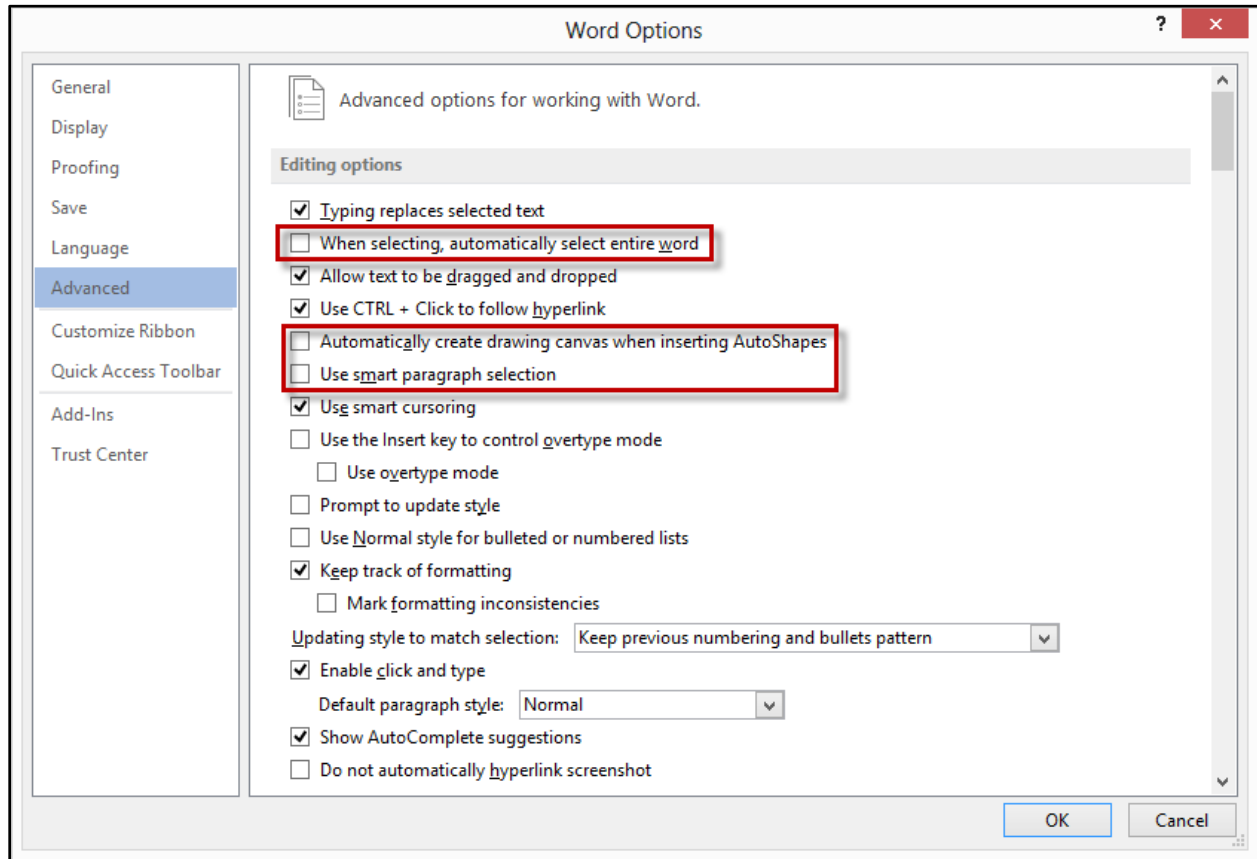


FIGURE 7-9

- Uncheck **When selecting, automatically select entire word**. Regain control over your mouse.
- Uncheck **Automatically create drawing canvas when inserting AutoShapes**.
- Uncheck **Use smart paragraph selection**.

Some other items to watch out for are:

- Make sure **Typing replaces selected text** is checked. If not, you will not be able to overwrite on top of a selected word
- **Use smart cursoring** moves the cursor when you scroll up or down through the document, this may or may not be what you want
- **Enable click and type**, in print layout, will format itself to place the text where you double click.

## Options ➔ Advanced ➔ Cut, Copy and Paste

Note that in this area you can control the default paste action in a variety of circumstances. When copying from other programs (such as a browser), we recommend that you strip all formatting off of the source text. By changing the setting shown below, this will always be the case. You may want to change some of the other settings as well depending upon how you work.

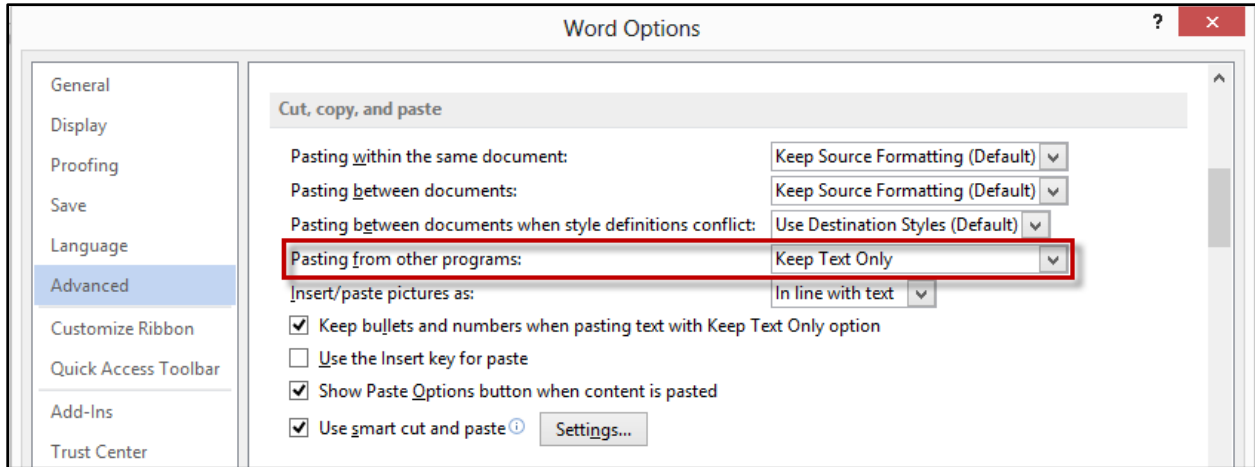


FIGURE 7-10

## Options → Advanced → Show Document Content

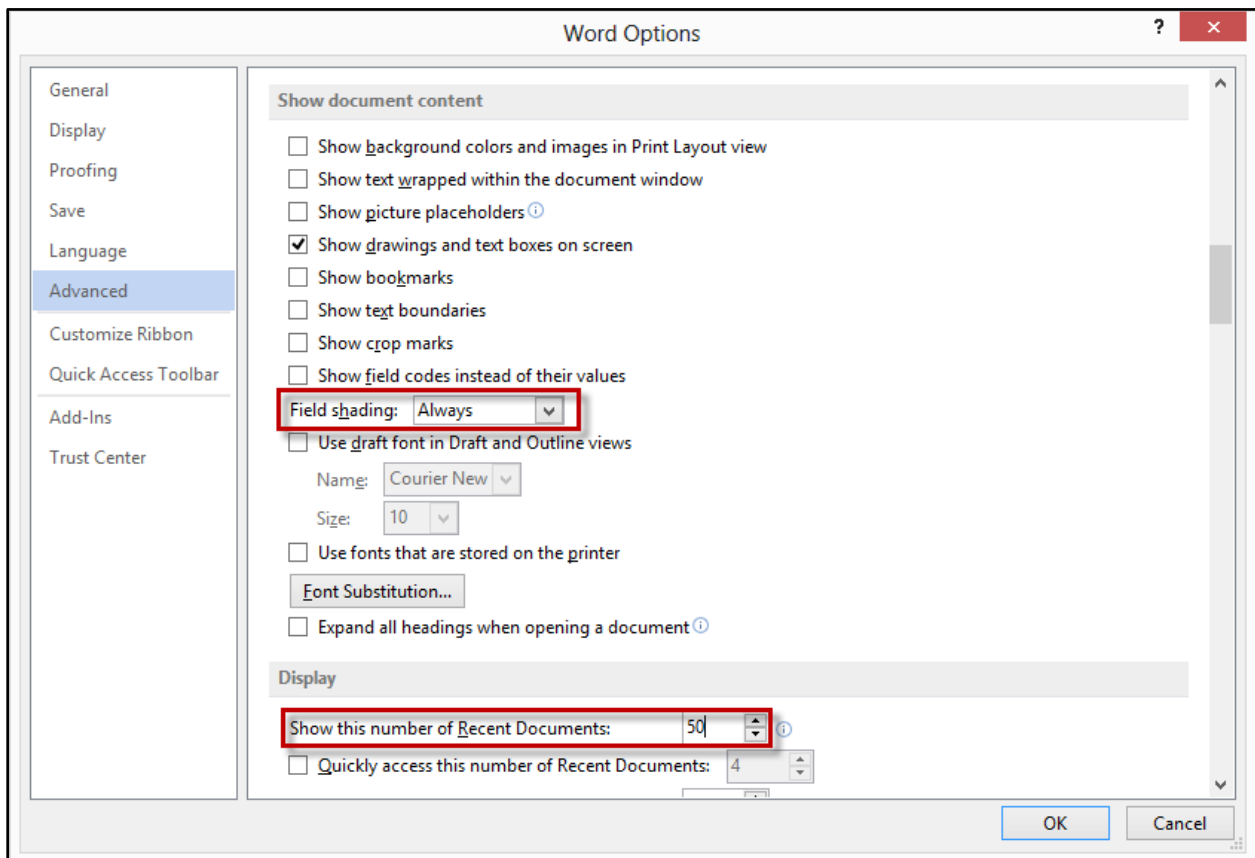


FIGURE 7-11

- Change **Field shading** to **Always**.
- Change **Show this number of Recent Documents** to your preference.



## Options ➔ Advanced ➔ Fidelity & General

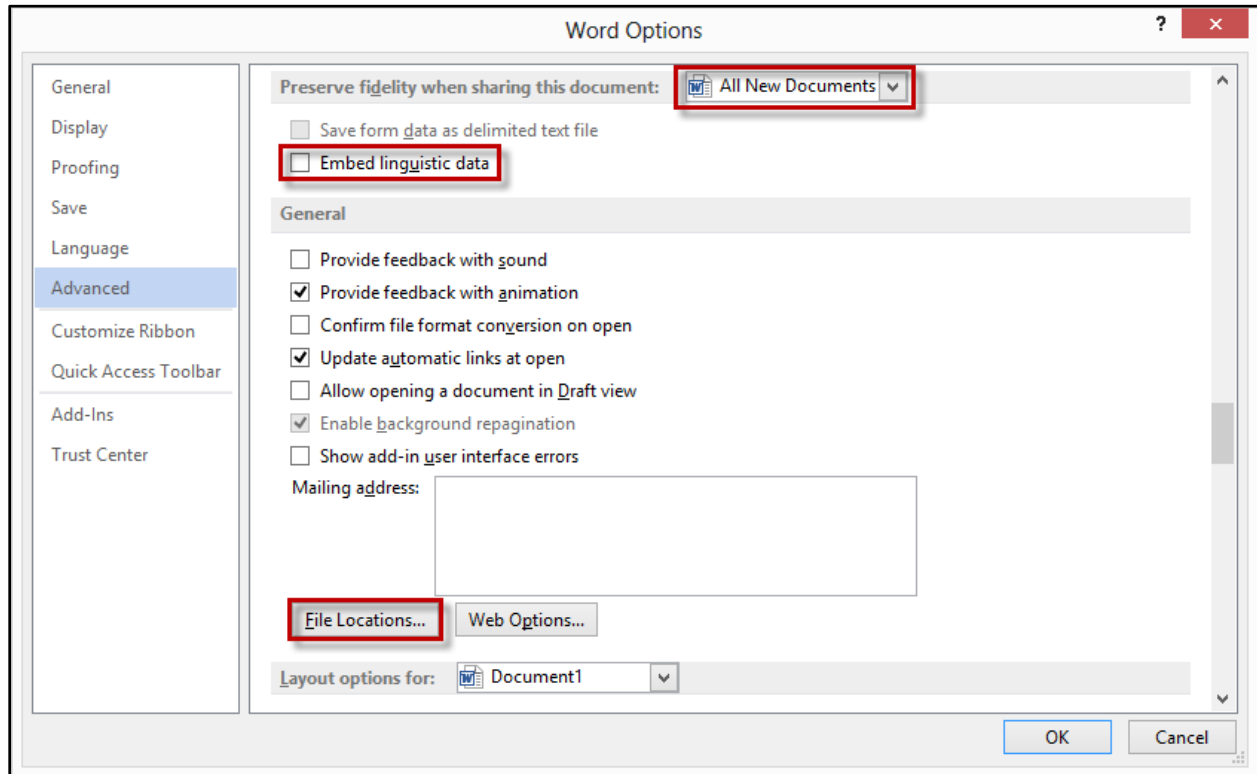


FIGURE 7-12

- Change the heading in **Preserve fidelity when sharing this document** to **All New Documents** (so the setting change applies to all future documents) and clear the **Embed linguistic data** box. "Linguistic data" refers to things like speech (from text-to-speech or speech-to-text applications or add-ins) and handwriting. You're probably not using either of those things so embedding them only makes the file-sizes bigger (unnecessarily).
- Click **File Locations** and make sure that Word is defaulted to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.

## Options → Advanced → Layout Options

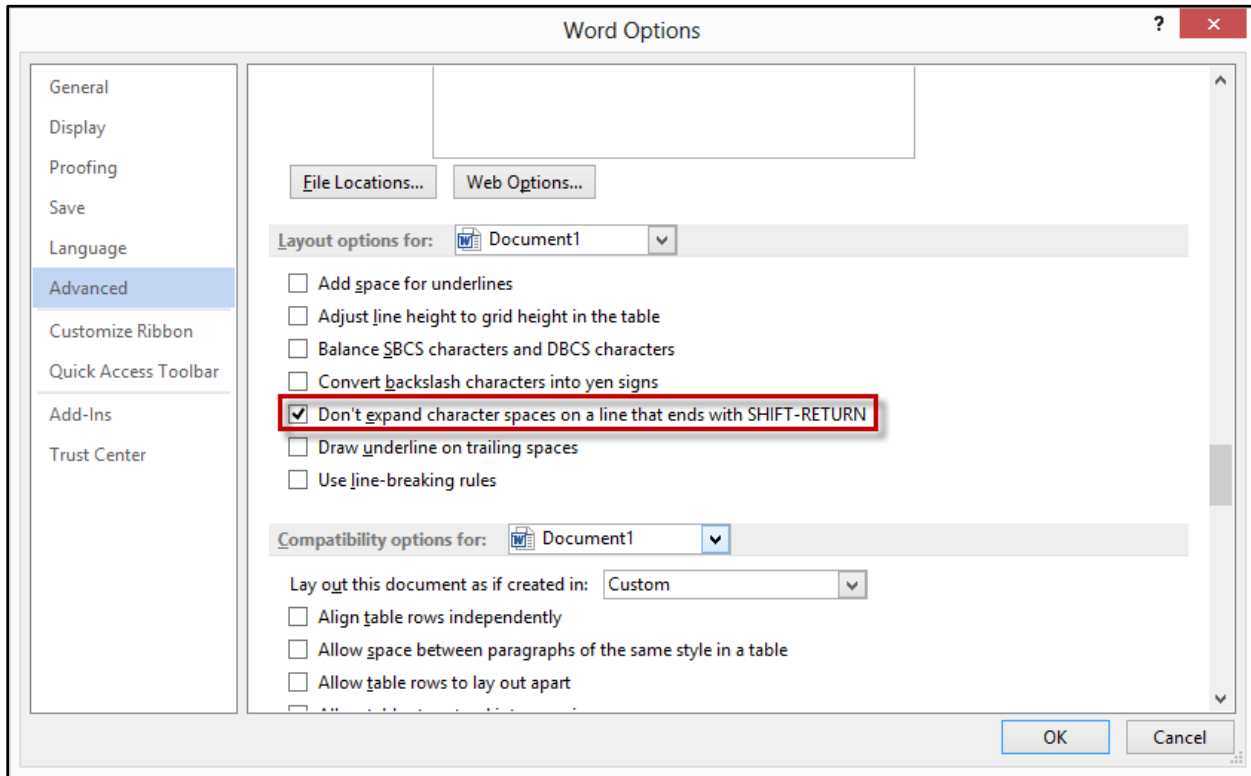
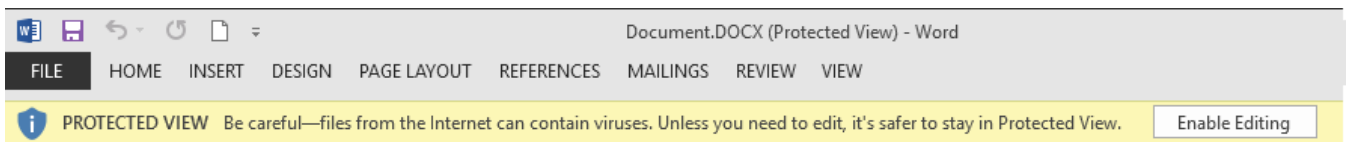


FIGURE 7-13

Check **Don't expand character spaces on a line that ends with SHIFT-RETURN** because this is the number one reason that a few words will be spread across the entire line with giant gaps between each word. For your information, Shift + Return = "soft return" which tricks Word into thinking that what appears to be two lines of text are actually one line of text.

## Options → Trust Center → Trust Center Settings Button → Protected View

By default Protected View is enabled. When enabled, Word displays a warning if the Word document was created on a different system. While the warning is displayed, the file may only be viewed, not edited. To edit the document, you must click the **Enable Editing button**.



Protected View disables all of the active content in the document and reduces the risk of infection from a worm, virus, or other malware that could be embedded in an unknown document.

If protected view bothers you, you may disable it. Yes, there is risk involved in disabling it. **You should check with your system administrator prior to unchecking these boxes.** To change these settings, go to **Protected View** and uncheck one or all of the boxes. See Figure 7-14.

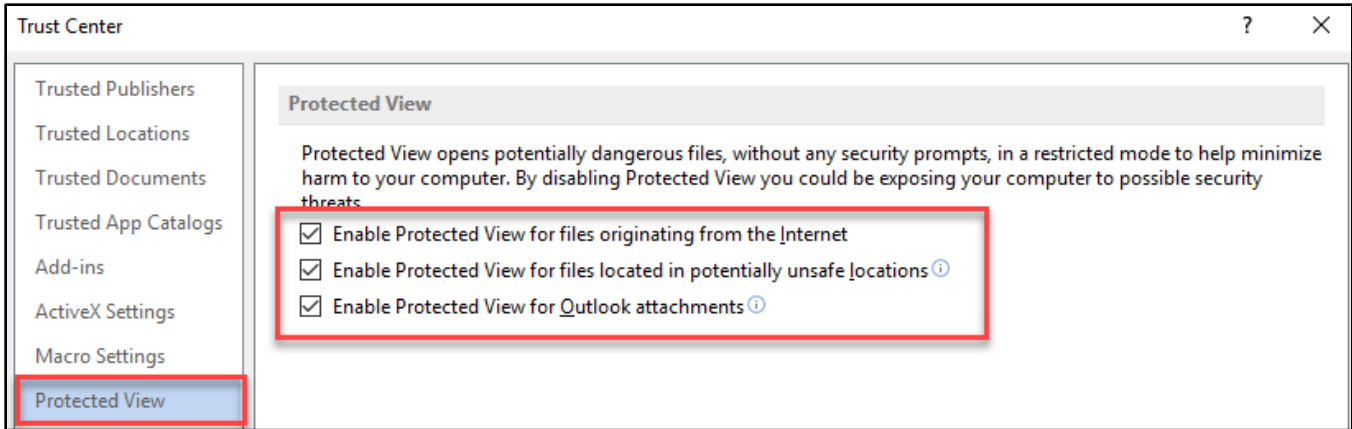


FIGURE 7-14

These boxes enable protected view, unchecking them disables the protection.

**Enable Protected View for files originating from the Internet.** This should probably remain checked. If you download a Word document from a web page, or anywhere else from the internet, you will probably want the Protected View protection.

**Enable Protected View for files located in potentially unsafe locations.** This is the main cause of triggering Protected View when opening a file from a network folder. You may disable this, but you may want to make your network server a "Trusted Location" instead. (See Trusted Location, below.) Unchecking this box also disables Protected View from other locations, such as USB thumb drives.

**Enable Protected View for Outlook attachments.** With this checked, you will receive a protected view warning for every Word document that you open as an attachment from Outlook. Unchecking this box turns off the protection.

**NOTE:** In addition to these settings, Windows may "block" Outlook attachments that you save to your file system. To unblock them, you must right-click the file, select **Properties**, check the **Unblock** box (on some systems this appears as a button instead of a checkbox), and click **OK**:

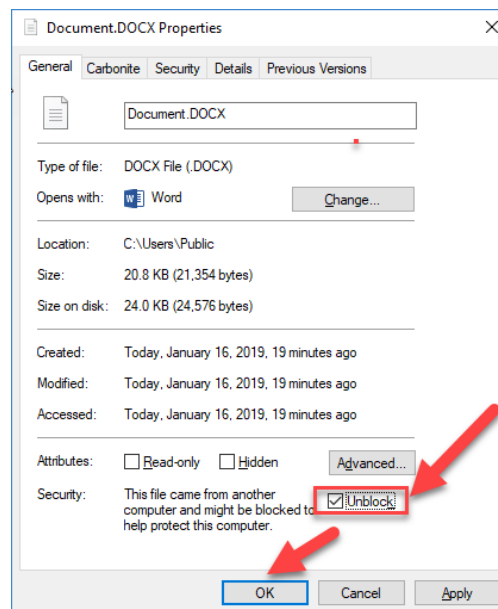


FIGURE 7-15

## Options → Trust Center → Trust Center Settings Button → Trusted Locations

Trusted Locations are for folders on your system or on your network that you trust. Adding a folder or network share as a Trusted Location completely disables all of the Trust Center checks and protections for that location. To add a folder such as "N:\Client Files" as Trusted Location:

1. Go to File → Options → Trust Center → Trust Center Settings → Trusted Locations.
2. Check the **Allow Trusted Locations on my network**. You will not be able to enter a network location without checking this box.
3. Click **Add new location**, enter the path of the folder and check **Subfolders of this location are also trusted**. Then click **OK** and **OK**. All documents in that folder will now be trusted, and the Trust Center will no longer check them.

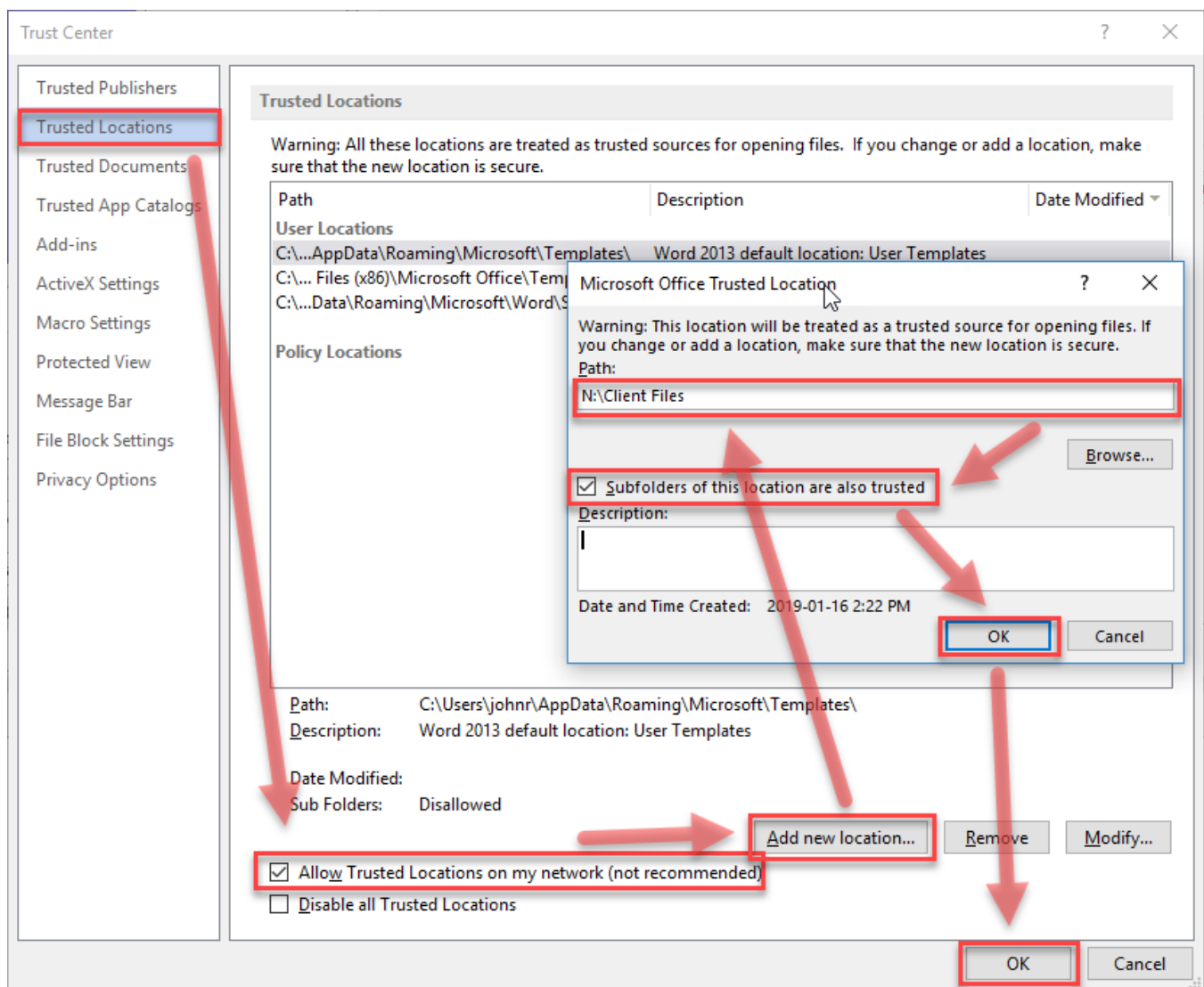


FIGURE 7-16

## Options → Trust Center → Trust Center Settings Button → File Block Settings

File Block Settings will trigger Protected View for all files of a particular type regardless of where they are located. Again, there is risk involved in disabling this feature. **Check with your system administrator before unchecking these boxes.** In particular, there have been prior issues with RTF files.

To have all file types open and allow editing without a prompt, under the **File Block Settings**, uncheck all of the check boxes and under **Open behavior for selected filed types**, select **Open selected file types in Protected View and allow editing**. See Figure 7-17.

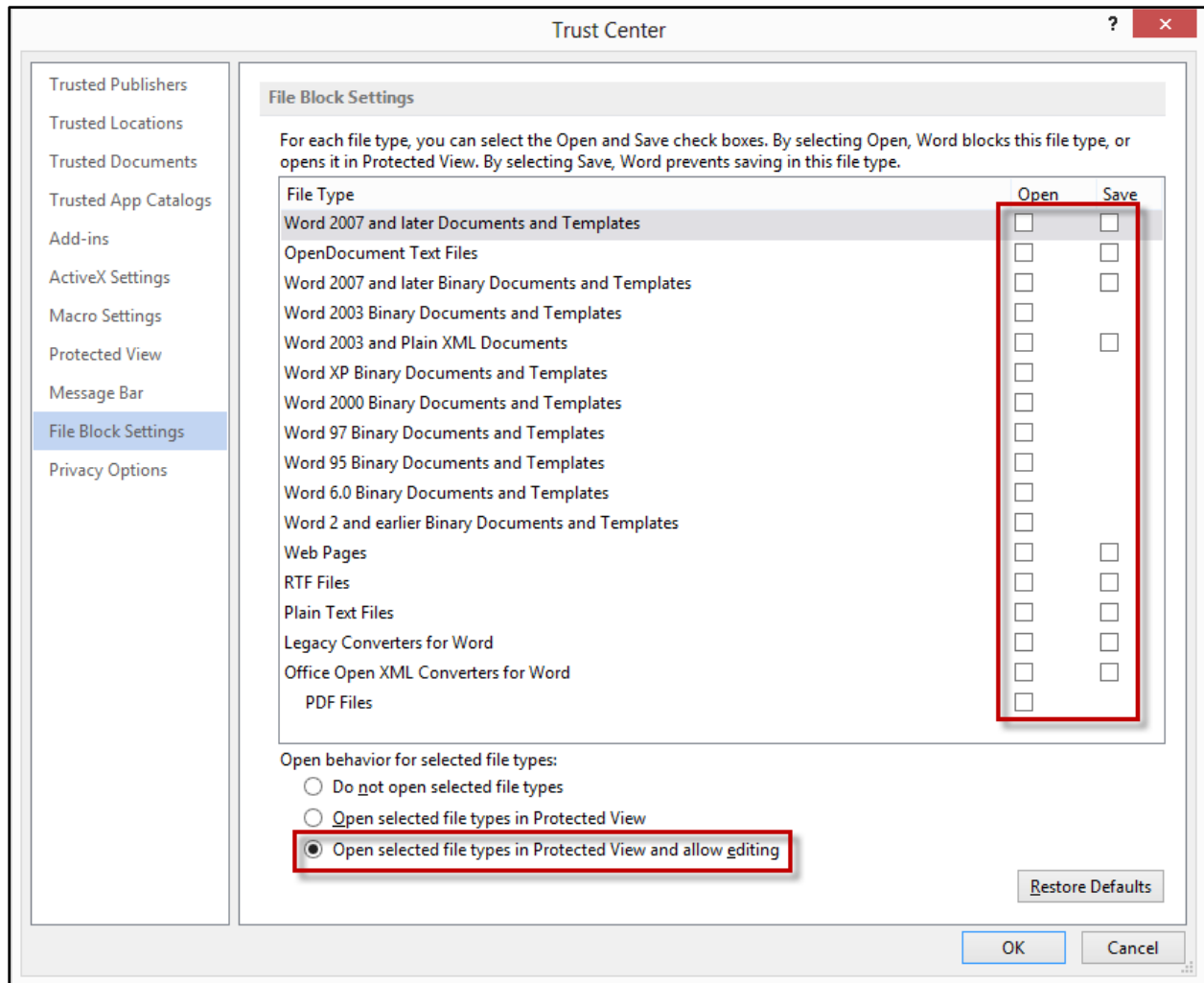


FIGURE 7-17

## Options → Trust Center → Trust Center Settings Button → Privacy Options

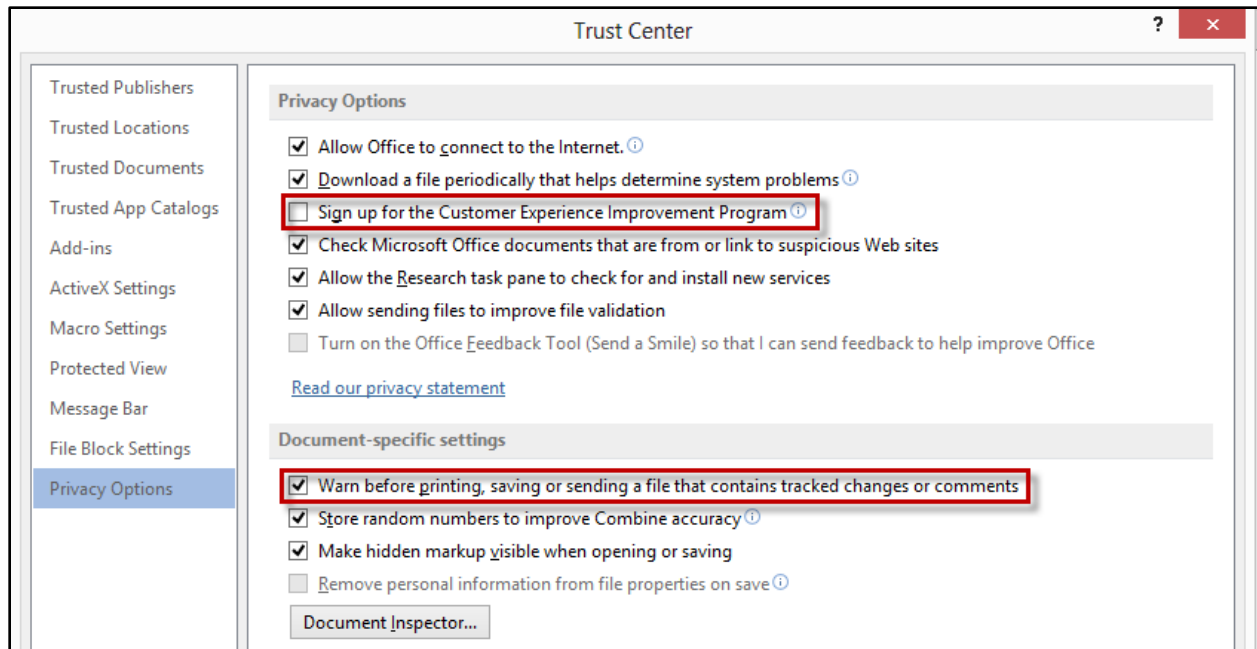


FIGURE 7-18

Make sure you clear the **Sign up for the Customer Experience Improvement Program** box and check the **Warn before printing, saving or sending a file that contains tracked changes or commands** box.

## Lock In Your Setting Changes

Make sure that after you're done with all of the foregoing changes that you click the **OK** button, **NOT Cancel** and **NOT the X button** in the top, right-hand corner of the dialog. That makes the changes stick. It's a good idea after you do this to exit Word, re-launch Word and spot check a couple of the settings to ensure that they're still modified. If the changes don't stick, there are a couple of reasons that could happen and we can help you figure out why. Just send us an email -info@affinityconsulting.com.

## Fix Track Changes Settings

Track Changes was modified in Word 2013 and there are a few changes you'll want to make with it. All of these changes begin on the **Review ribbon** in Word 2013.

### Change the Markup

By default, Word shows you **Simple Markup** which means that if you delete text, it literally disappears and a little red, vertical line appears in the left margin adjacent to the line where something was deleted. Of course, I not only want to know that something was deleted, but *what* was deleted. Therefore, switch from **Simple Markup** to **All Markup** (see below).

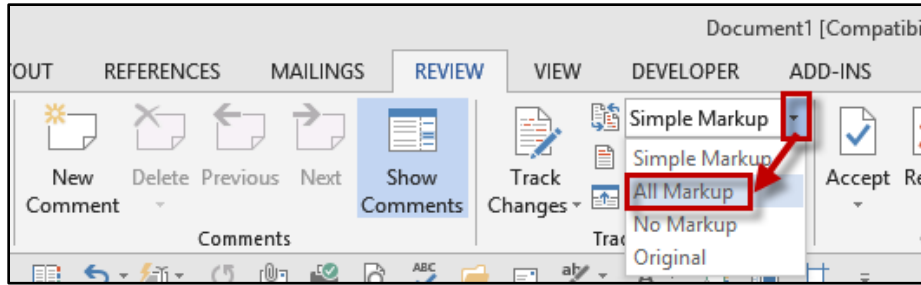


FIGURE 7-19

## Track Changes Options

In order to get to this dialog, click **Review ribbon | Tracking launcher**.

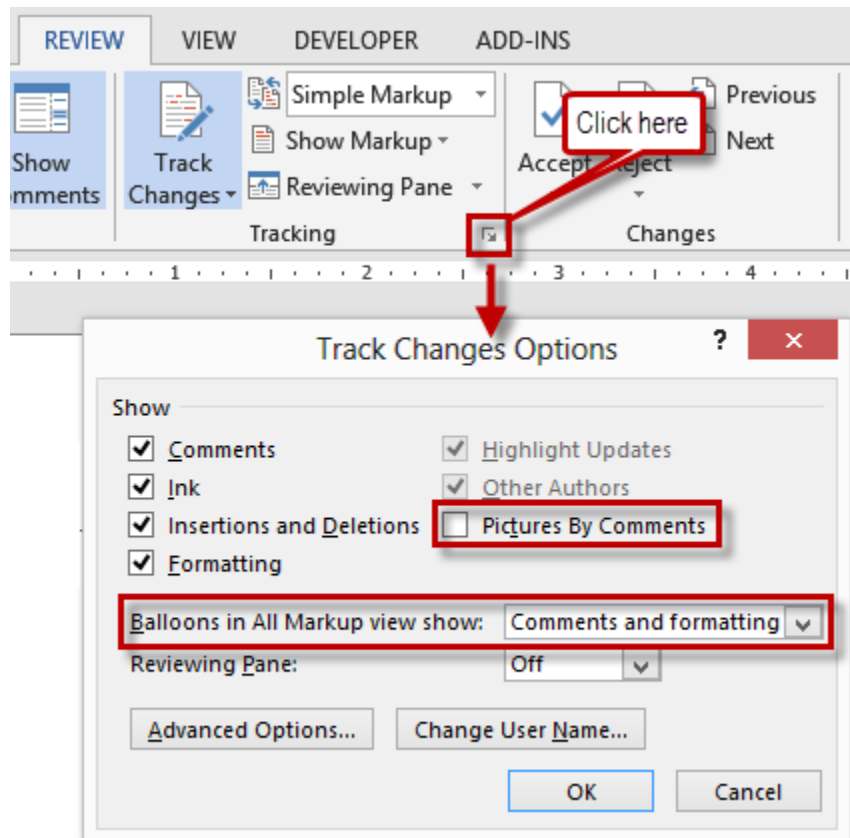


FIGURE 7-20

- Clear **Pictures By Comments** (unnecessary and clutters up the comment screen).
- **Balloons are best used for Comments and Formatting only**: not Revisions which is the default setting.

# CHAPTER 8

# DEFAULT SETTING

# CHANGES FOR WORD 2016

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

## In General

**NOTE** that you get to all of the following screens by clicking the File menu → Options.

## Options → General

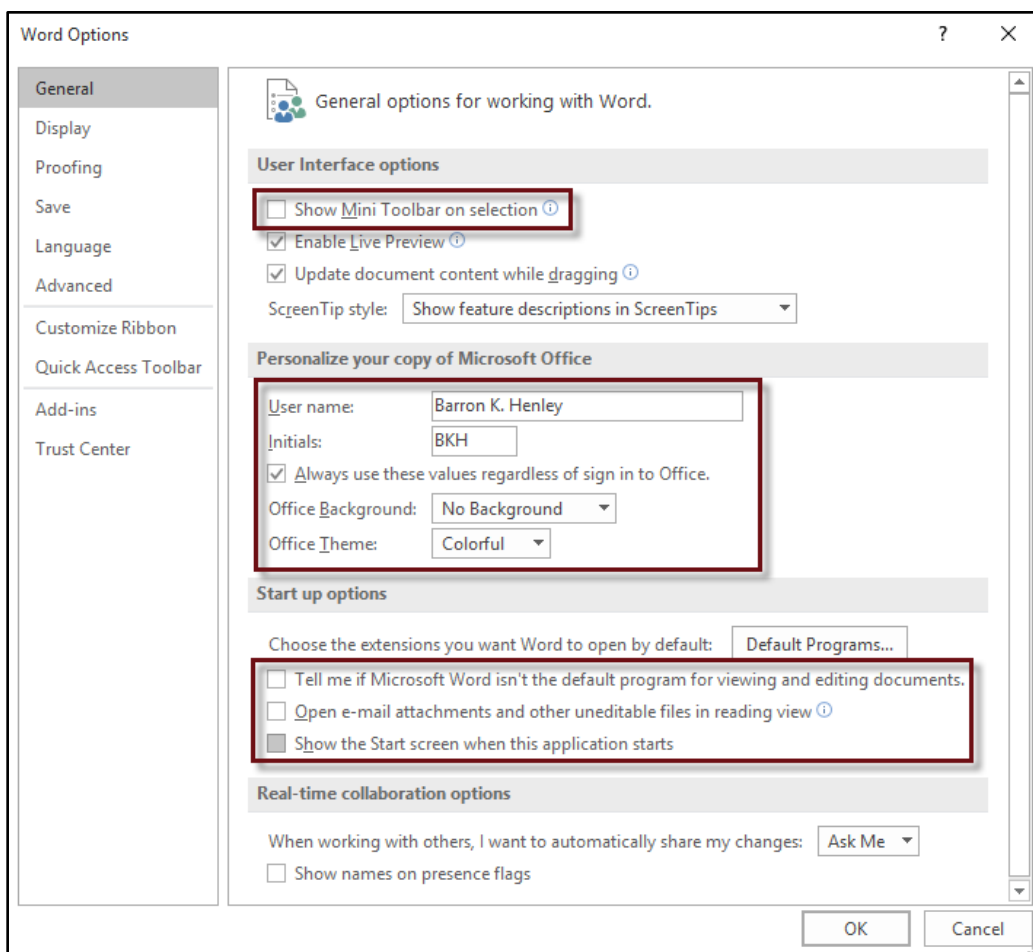


FIGURE 8-1



- **Show Mini Toolbar on selection:** This controls whether the mini toolbar appears when selecting text. Uncheck this box to prevent the mini toolbar from popping up and covering part of the document.

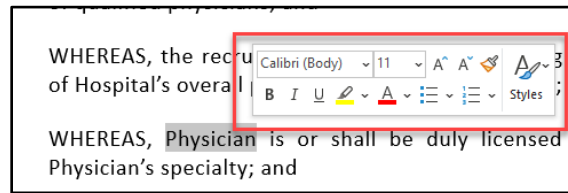


FIGURE 8-2

- Make sure your name and initials are in the **User name** and **Initials boxes**. Check **Always use these values regardless of sign in to Office** to use the values entered despite how your Office account may be setup.
- **Office Background:** the background a graphic that appears at the top, right-hand corner of the Word screen. Most users select **No Background**.
- **Office Theme: White, Dark Gray, and Black** change the bulk of the screen to the corresponding color. **Colorful** changes the bar across the top to the color associated with that program (blue for Word and Outlook, green for Excel, etc.).
- **Tell me if Word isn't default program for viewing and editing documents:** When checked, if another program is set as your default program for editing documents, Word will alert you when opening Word. If you'd prefer not to receive such an alert, uncheck this box.
- **Open e-mail attachments in Reading View:** When checked, Word documents attached to emails will open in Reading View. If you do not like the reading view, uncheck this box.
- **Show the Start screen when this application starts:** The start screen is the full screen template selection screen that opens whenever you open Word. If you would prefer to go directly to a blank document when you open Word, uncheck this box.

## Options → Display

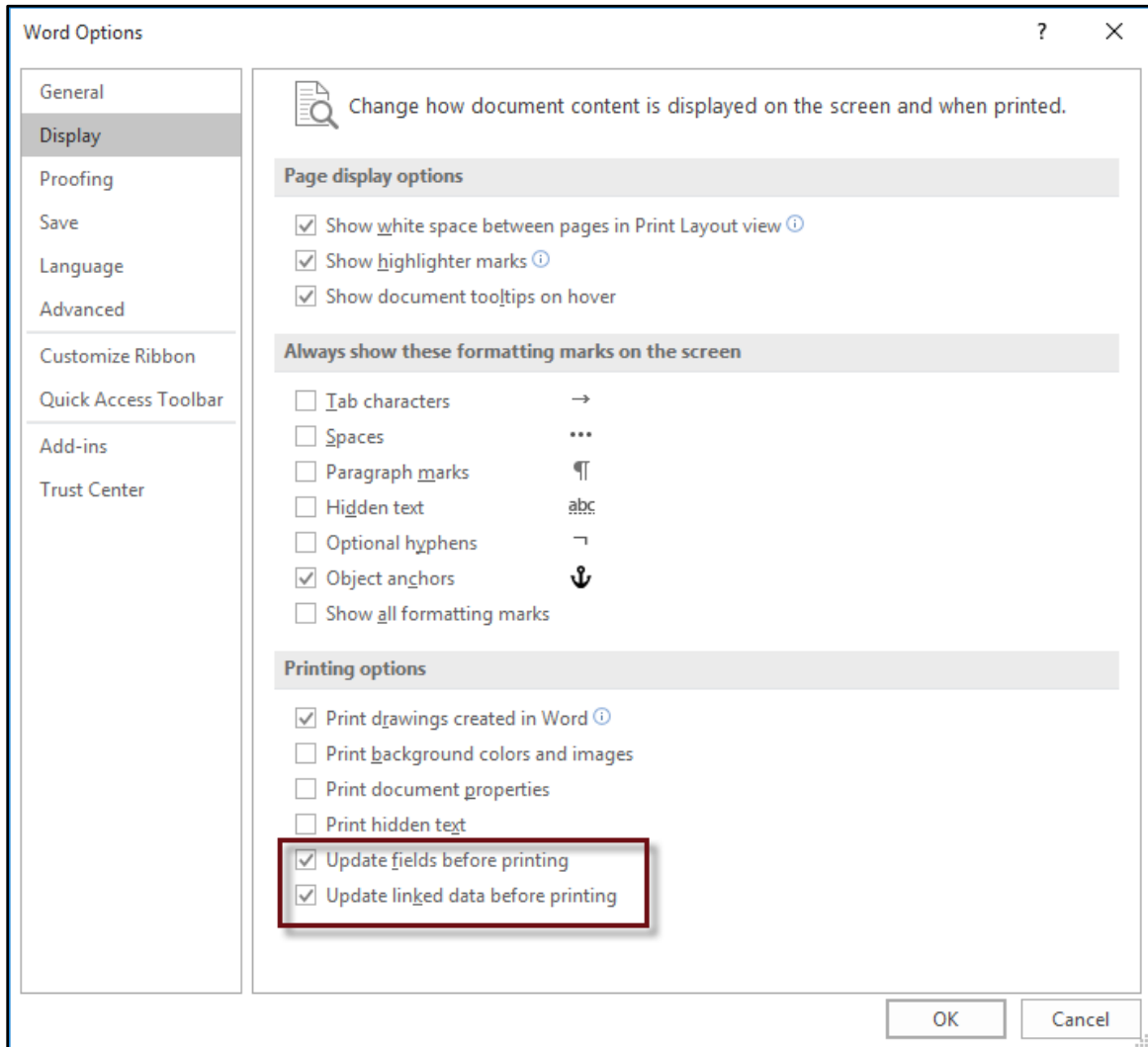


FIGURE 8-3

- Check **Update fields before printing**. Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.
- Check **Update linked data before printing**. This will make sure that all linked files are updated before printing.

## Options ➔ Proofing

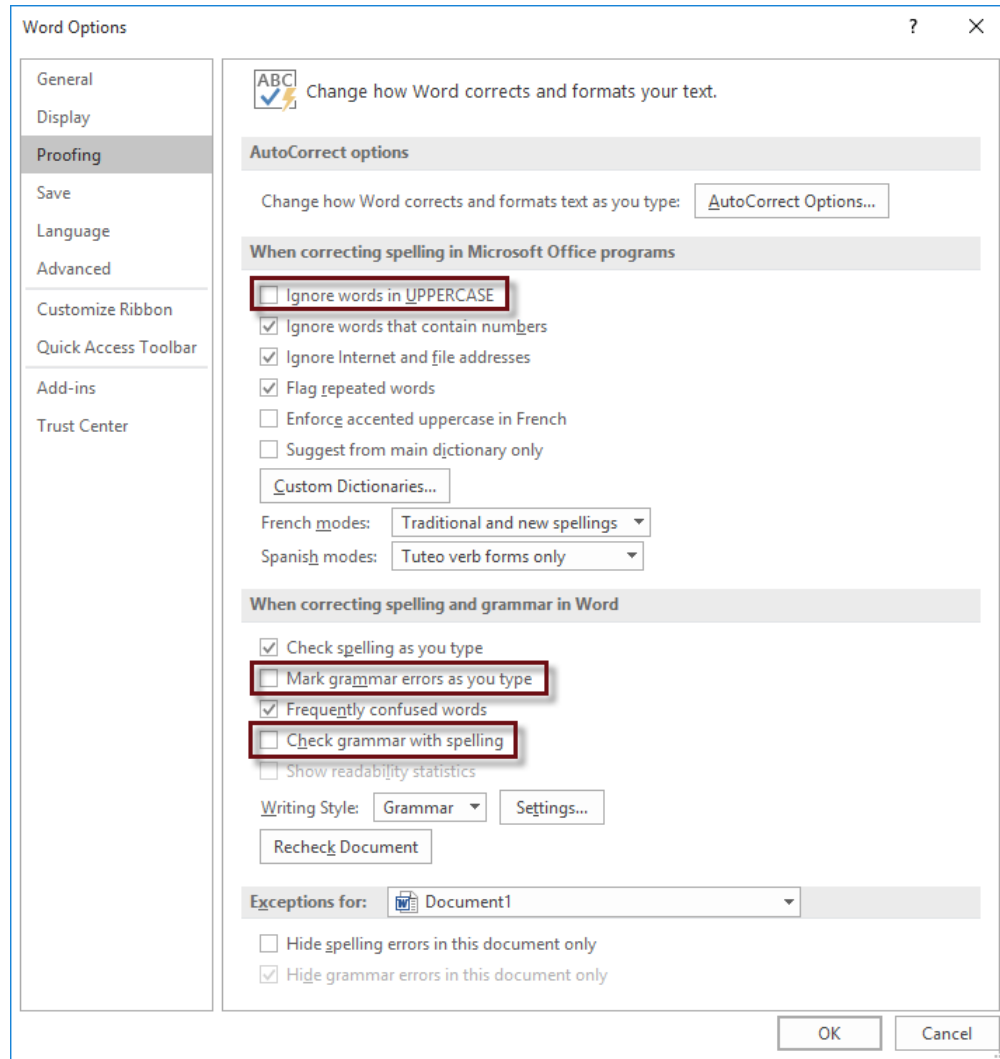


FIGURE 8-4

- Uncheck **Ignore words in UPPERCASE**. Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.
- Uncheck **Mark grammar errors as you type**. This will eliminate the green squiggly lines in the document.
- Uncheck/Check **Check grammar with spelling**. Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

## Options ➔ Proofing and Autocorrect

Next, go to **Proofing** and click on **Autocorrect Options** button. This will launch the **Autocorrect Options dialog**.

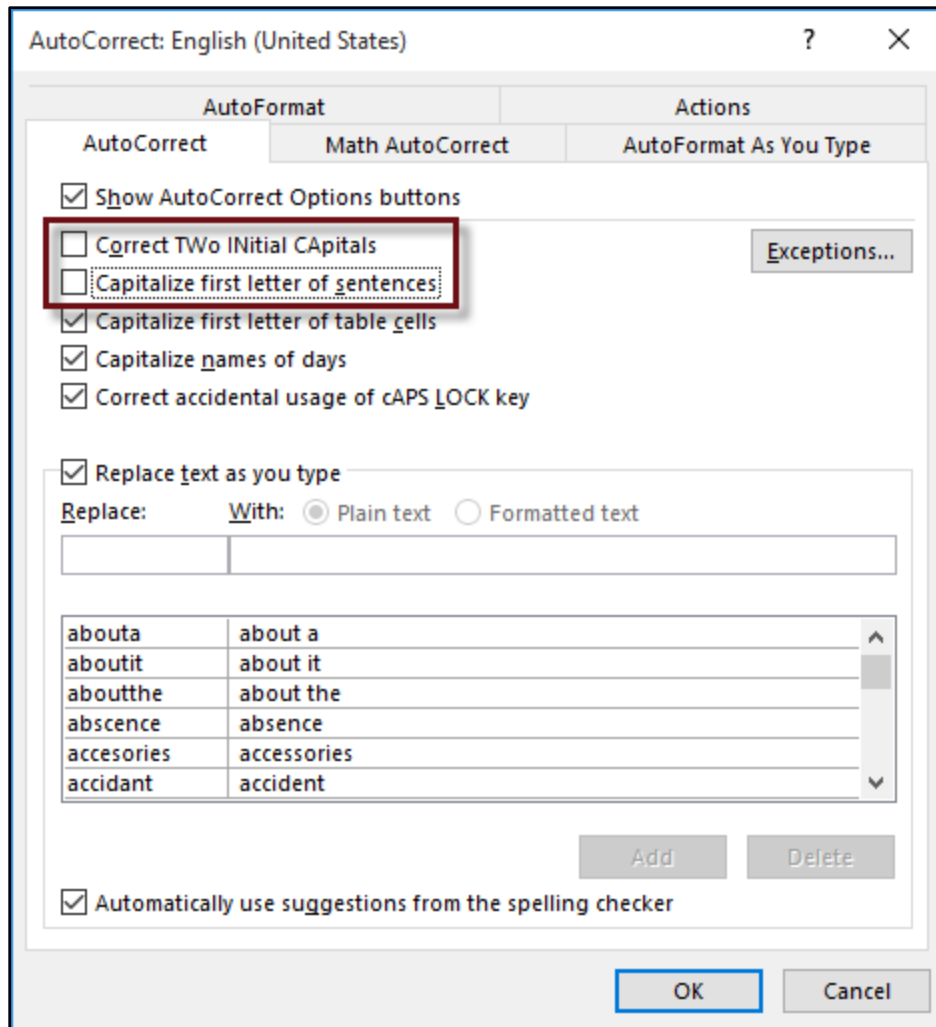


FIGURE 8-5

Uncheck **Correct Two Initial Capitals** and **Capitalize first letter of sentences** as most people find that annoying because they MEANT to do it (IDs or cc:). **Note:** you can also delete the AutoCorrect entries in the list at the bottom of the dialog which replaces (c) with © and (r) with ®.

Next click on the **AutoFormat As You Type** tab.

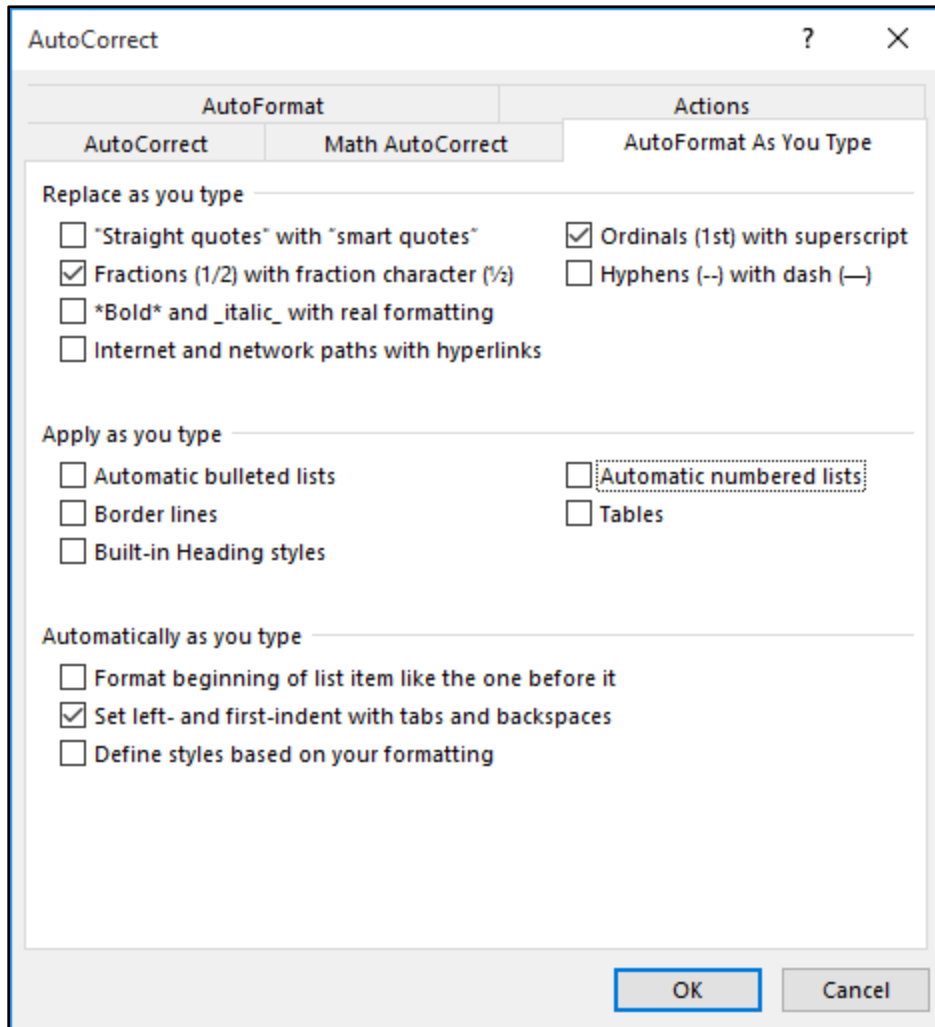


FIGURE 8-6

Uncheck everything except **Ordinals**, **Fractions** and **Set left and first indent with tabs and backspaces**. Optional items include checking **Internet and network paths with hyperlinks** will create clickable hyperlinks to internet addresses, so that a person opening the document can click on the link and go to the web address right from the document. You might also check the **Straight quotes with smart quotes** but keep in mind that this may result in your quotation marks getting converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

Be sure to uncheck everything else of this page!! The **Apply as you type section** causes Word to guess what is being typed and start inserting bulleted lists and tables on its own without any prompting to do so. Also be sure to uncheck **Define styles based on your formatting**. This option causes Word to create styles on its own.

Finally, click on the **AutoFormat** tab.

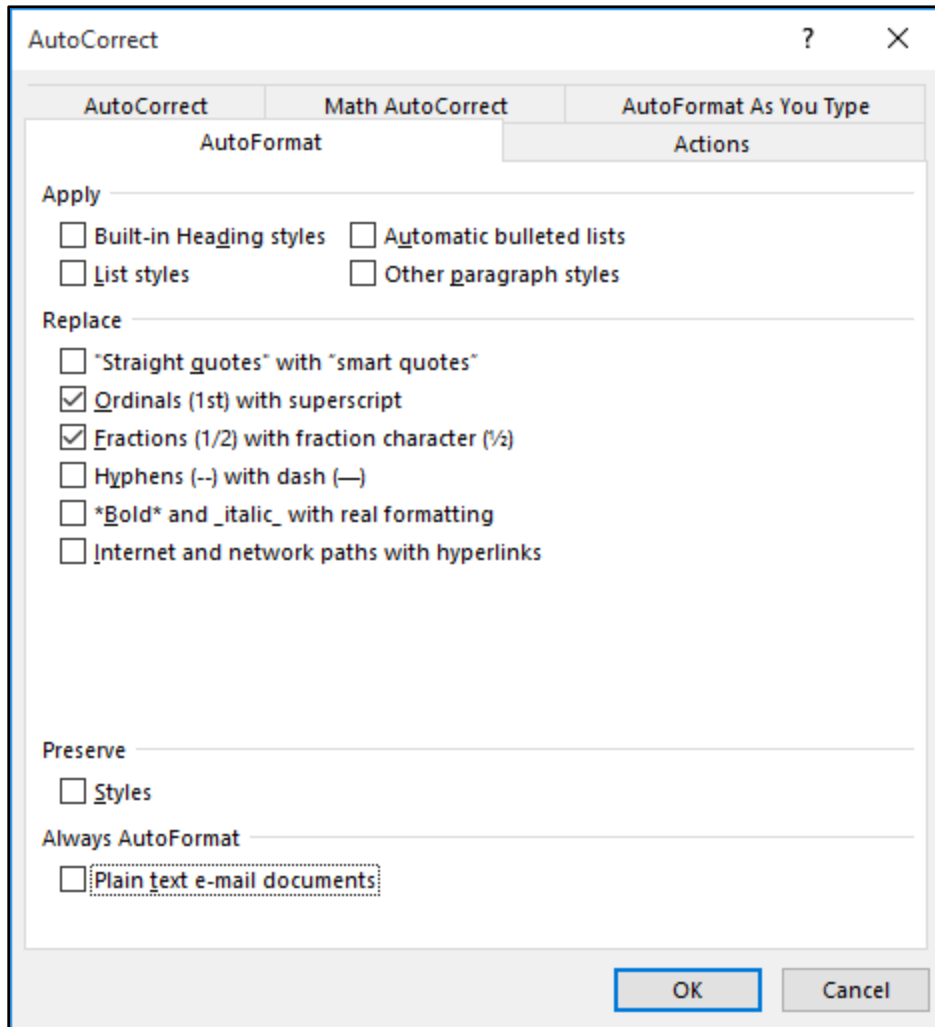


FIGURE 8-7

Make these options match the **AutoFormat As You Type** options.

At this point, make sure to click the **OK** button or all of the changes will be lost.

## Options → Save

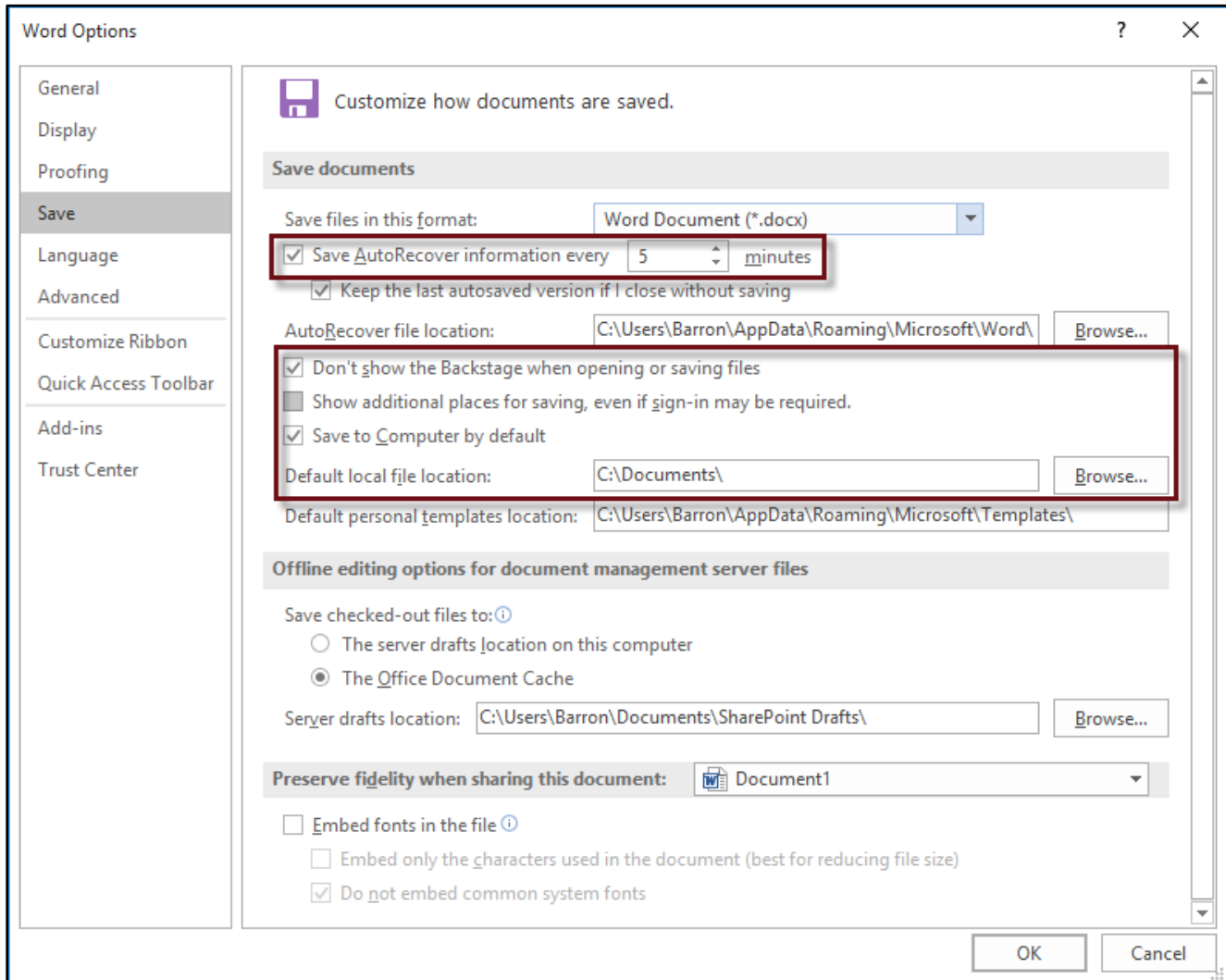


FIGURE 8-8

- **Save AutoRecover information:** Reduce this to **5 minutes** rather than 10 minutes. More frequency is a good thing.
- **Don't show the Backstage when opening or saving files:** If you want Word 2016 to go directly to the open or save browse screens when you open or save a file, then check this box.
- **Show additional places for saving, even if sign-in may be required:** This is just a waste of space on your save screen, so clear this box.
- **Save to Computer by default:** Microsoft really wants you to save everything to OneDrive and you probably don't want to. Therefore, check this box.

## Options ➔ Advanced ➔ Editing Options

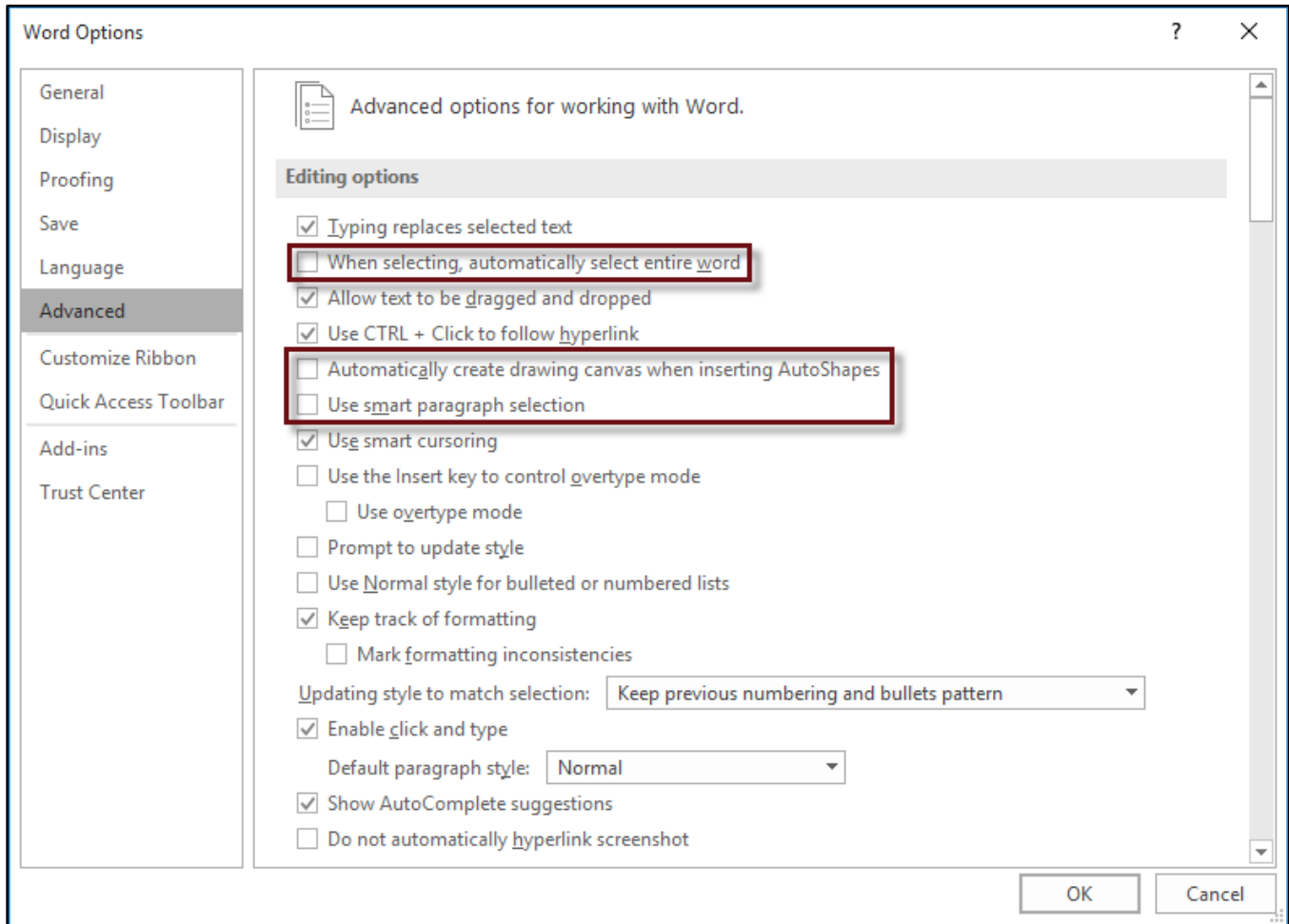


FIGURE 8-9

- Uncheck **When selecting, automatically select entire word**. Regain control over your mouse.
- Uncheck **Automatically create drawing canvas when inserting AutoShapes**.
- Uncheck **Use smart paragraph selection**.

Some other items to watch out for are:

- Make sure **Typing replaces selected text** is checked. If not, you will not be able to overwrite on top of a selected word
- **Use smart cursoring** moves the cursor when you scroll up or down through the document, this may or may not be what you want
- **Enable click and type**, in print layout, will format itself to place the text where you double click.



## Options → Advanced → Cut, Copy and Paste

Note that in this area you can control the default paste action in a variety of circumstances. When copying from other programs (such as a browser), we recommend that you strip all formatting off of the source text. By changing the setting shown below, this will always be the case. You may want to change some of the other settings as well depending upon how you work.

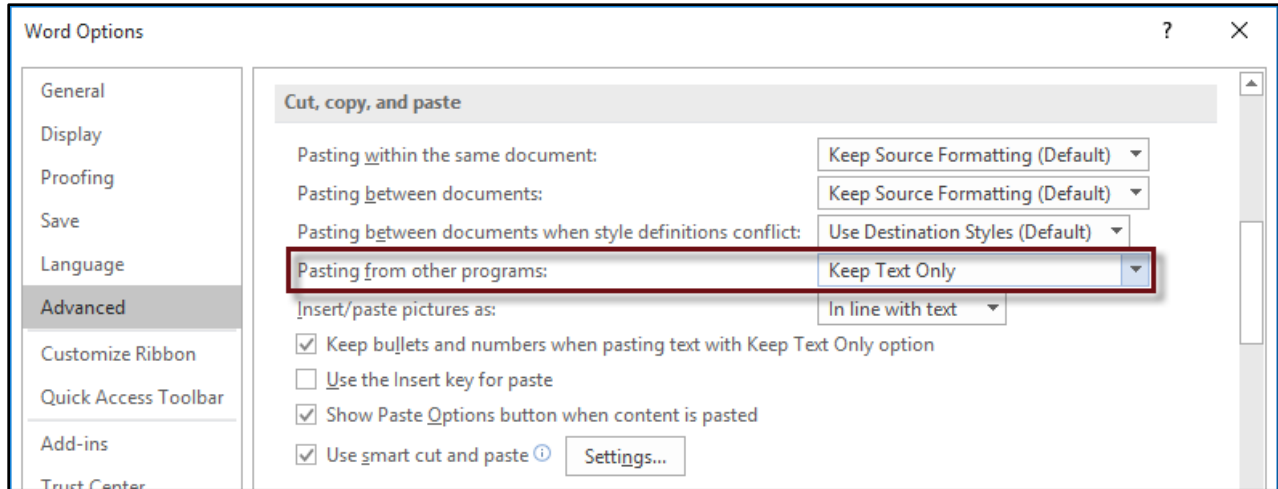


FIGURE 8-10

## Options → Advanced → Show Document Content

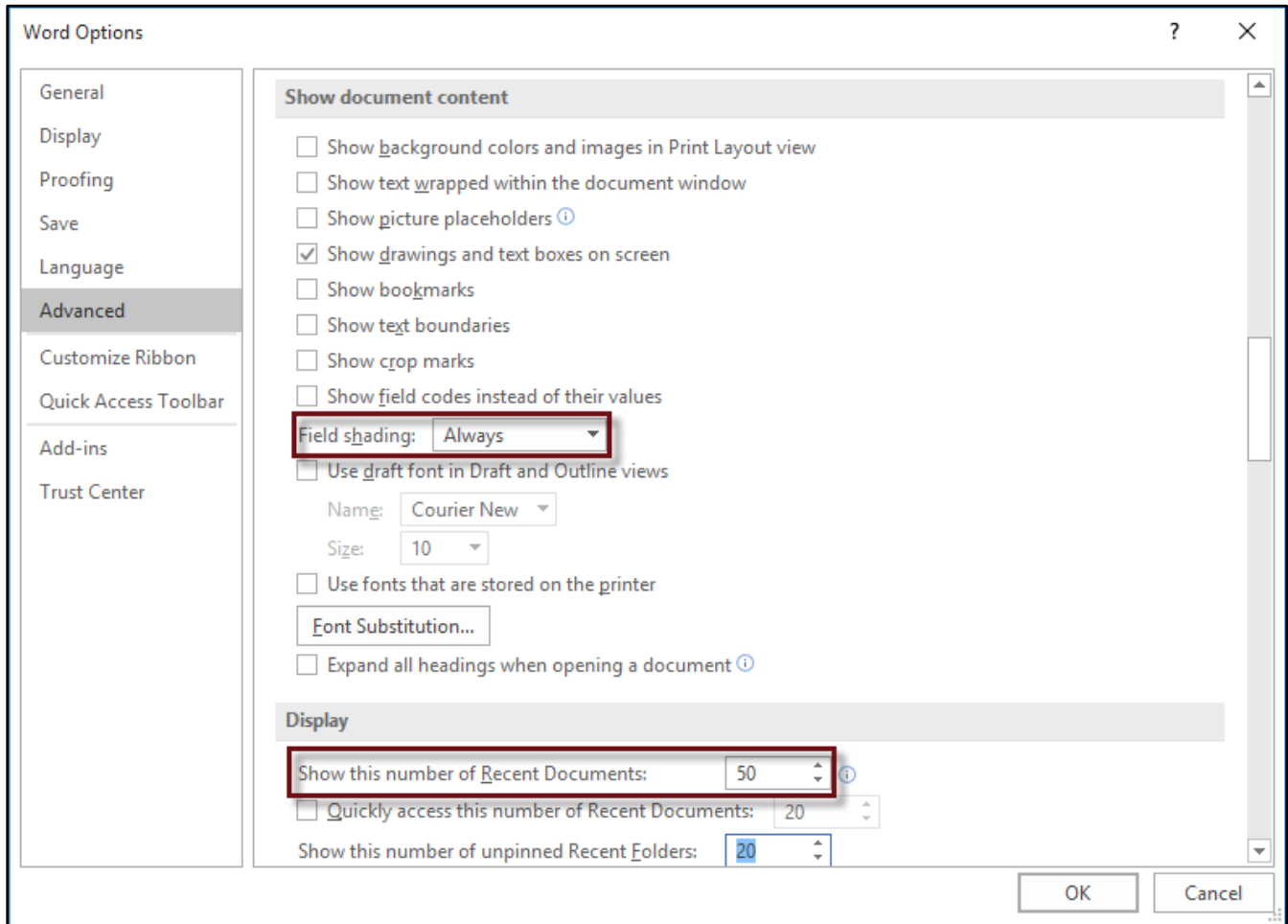


FIGURE 8-11

- Change **Field shading** to **Always**.
- Change **Show this number of Recent Documents** to your preference.

## Options → Advanced → Fidelity & General

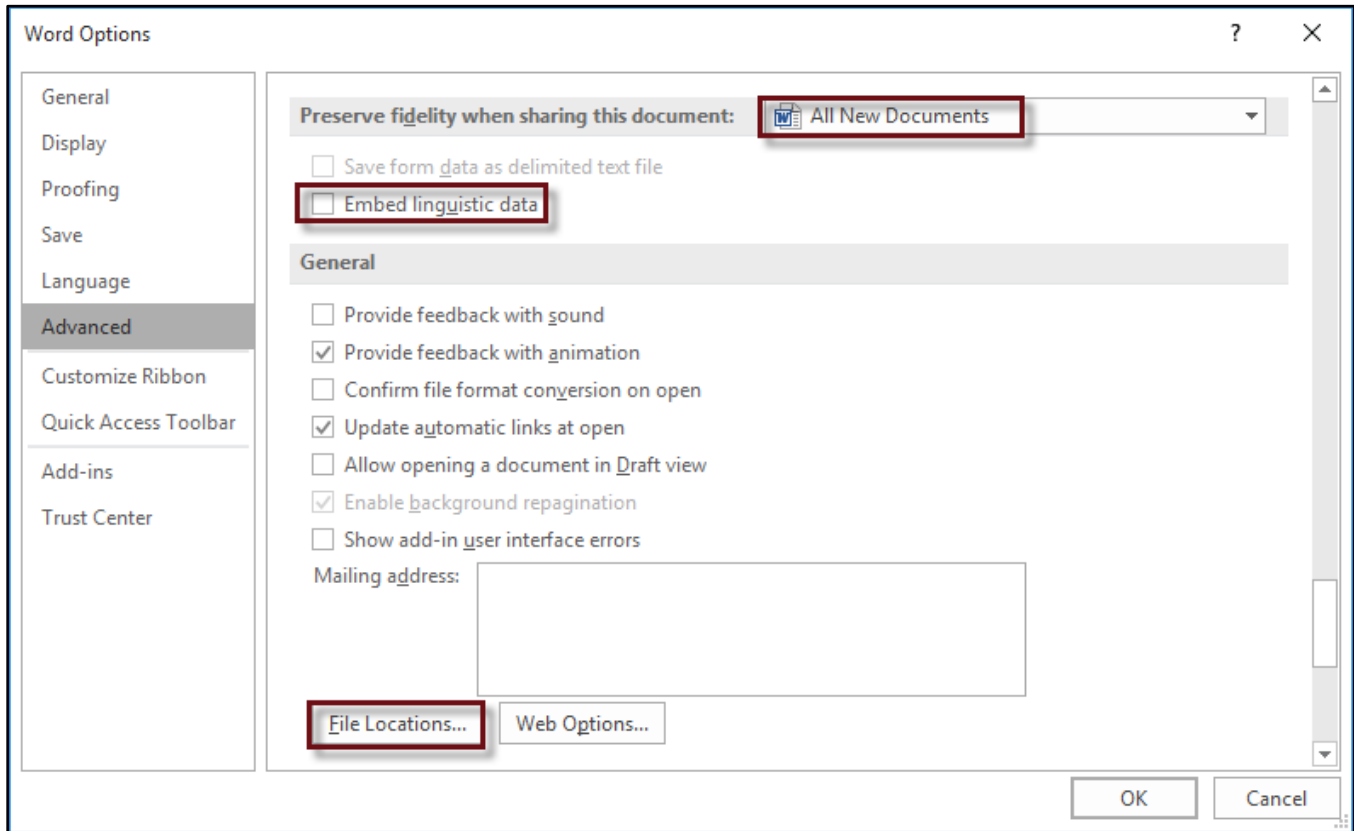


FIGURE 8-12

- Change the heading in **Preserve fidelity when sharing this document** to **All New Documents** (so the setting change applies to all future documents) and clear the **Embed linguistic data** box. "Linguistic data" refers to things like speech (from text-to-speech or speech-to-text applications or add-ins) and handwriting. You're probably not using either of those things so embedding them only makes the file-sizes bigger (unnecessarily).
- Click **File Locations** and make sure that Word is defaulted to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.

## Options ➔ Advanced ➔ Layout Options

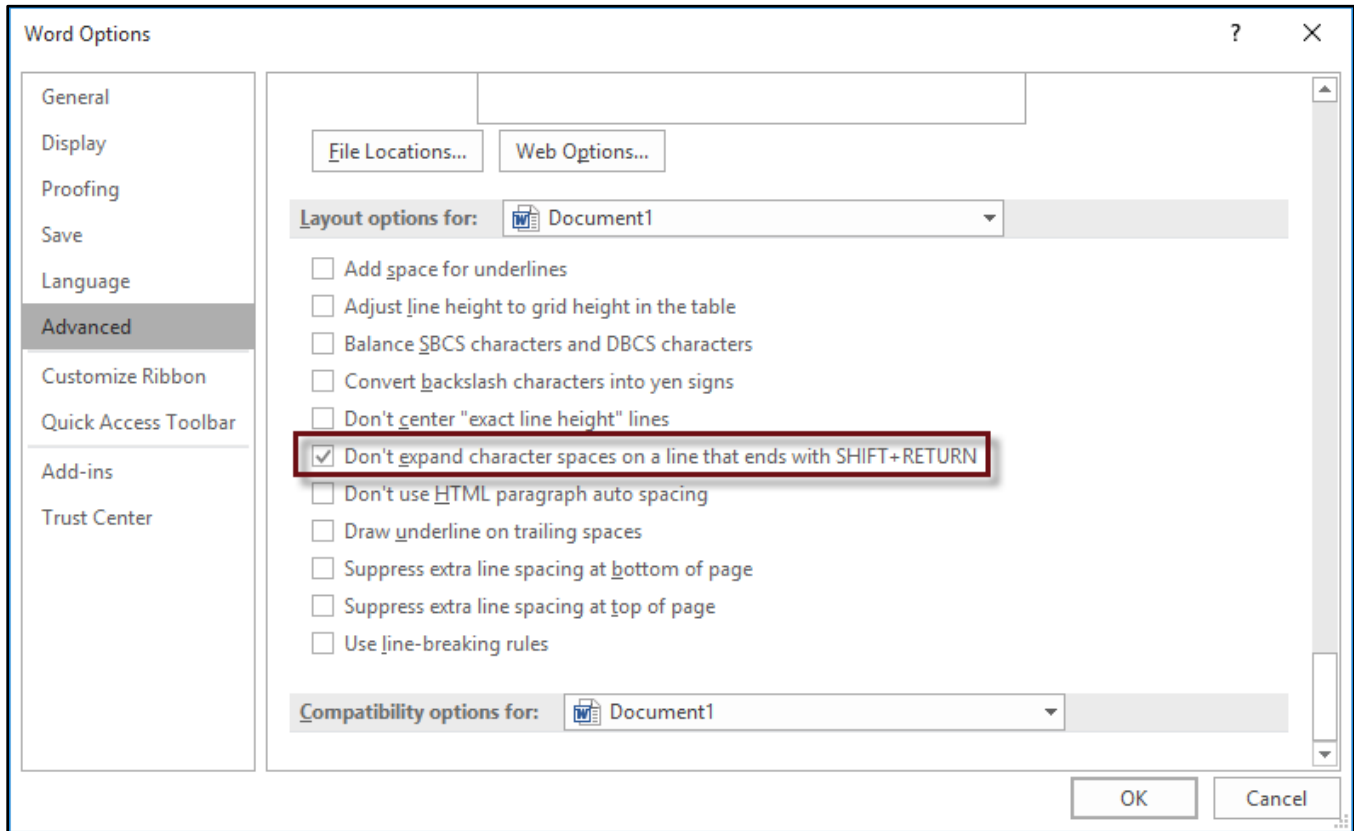
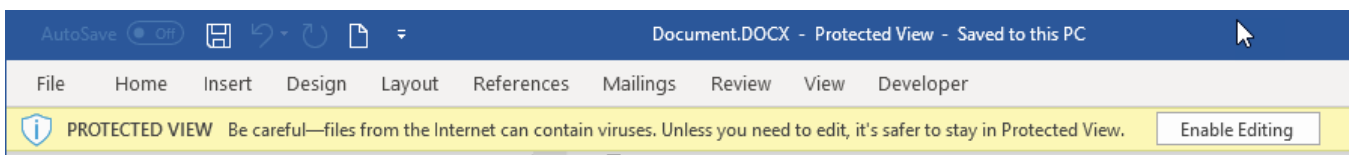


FIGURE 8-13

Check **Don't expand character spaces on a line that ends with SHIFT-RETURN** because this is the number one reason that a few words will be spread across the entire line with giant gaps between each word. For your information, Shift + Return = "soft return" which tricks Word into thinking that what appears to be two lines of text are actually one line of text.

## Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Protected View

By default Protected View is enabled. When enabled, Word displays a warning if the Word document was created on a different system. While the warning is displayed, the file may only be viewed, not edited. To edit the document, you must click the **Enable Editing button**.



Protected View disables all of the active content in the document and reduces the risk of infection from a worm, virus, or other malware that could be embedded in an unknown document.

If protected view bothers you, you may disable it. Yes, there is risk involved in disabling it. **You should check with your system administrator prior to unchecking these boxes.** To change these settings, go to **Protected View** and uncheck one or all of the boxes. See Figure 8-14.

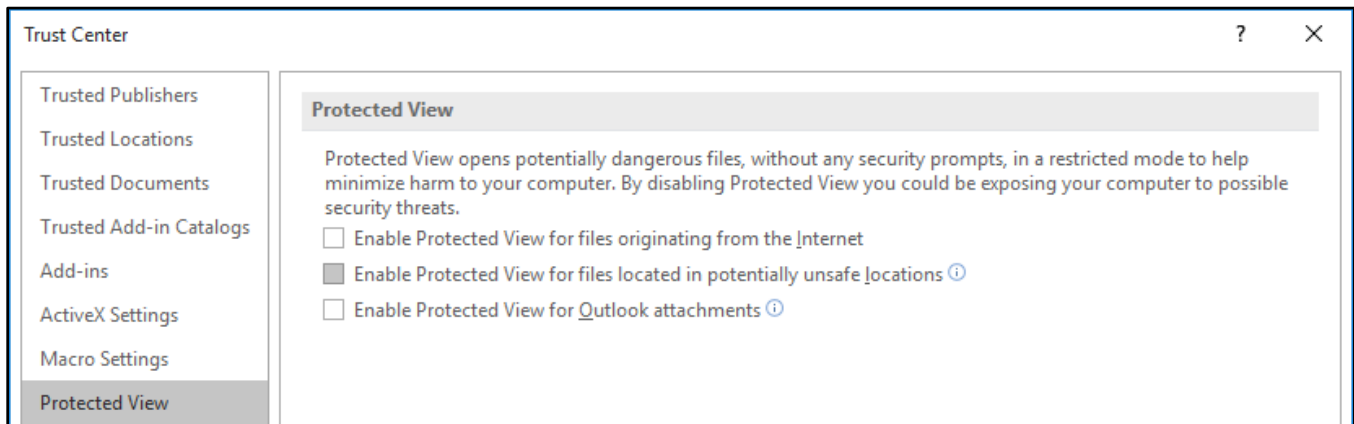


FIGURE 8-14

These boxes enable protected view, unchecking them disables the protection.

**Enable Protected View for files originating from the Internet.** This should probably remain checked. If you download a Word document from a web page, or anywhere else from the internet, you will probably want the Protected View protection.

**Enable Protected View for files located in potentially unsafe locations.** This is the main cause of triggering Protected View when opening a file from a network folder. You may disable this, but you may want to make your network server a "Trusted Location" instead. (See Trusted Location, below.) Unchecking this box also disables Protected View from other locations, such as USB thumb drives.

**Enable Protected View for Outlook attachments.** With this checked, you will receive a protected view warning for every Word document that you open as an attachment from Outlook. Unchecking this box turns off the protection.

**NOTE:** In addition to these settings, Windows may "block" Outlook attachments that you save to your file system. To unblock them, you must right-click the file, select **Properties**, check the **Unblock box** (on some systems this appears as a button instead of a checkbox), and click **OK**:

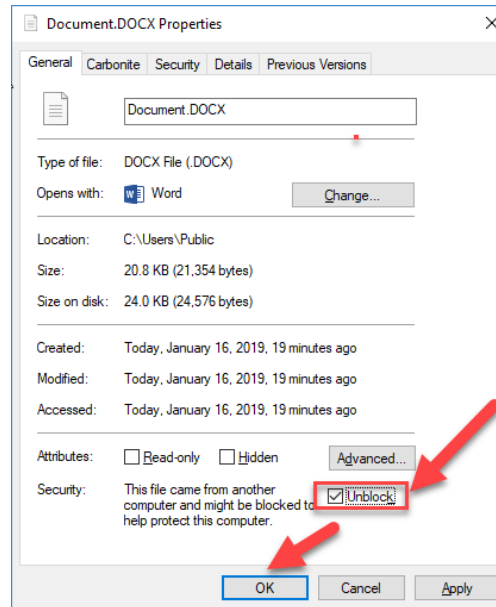


FIGURE 8-15

## Options → Trust Center → Trust Center Settings Button → Trusted Locations

Trusted Locations are for folders on your system or on your network that you trust. Adding a folder or network share as a Trusted Location completely disables all of the Trust Center checks and protections for that location. To add a folder such as "N:\Client Files" as Trusted Location:

4. Go to File → Options → Trust Center → Trust Center Settings → Trusted Locations.
5. Check the **Allow Trusted Locations on my network**. You will not be able to enter a network location without checking this box.
6. Click **Add new location**, enter the path of the folder and check **Subfolders of this location are also trusted**. Then click **OK** and **OK**. All documents in that folder will now be trusted, and the Trust Center will no longer check them.

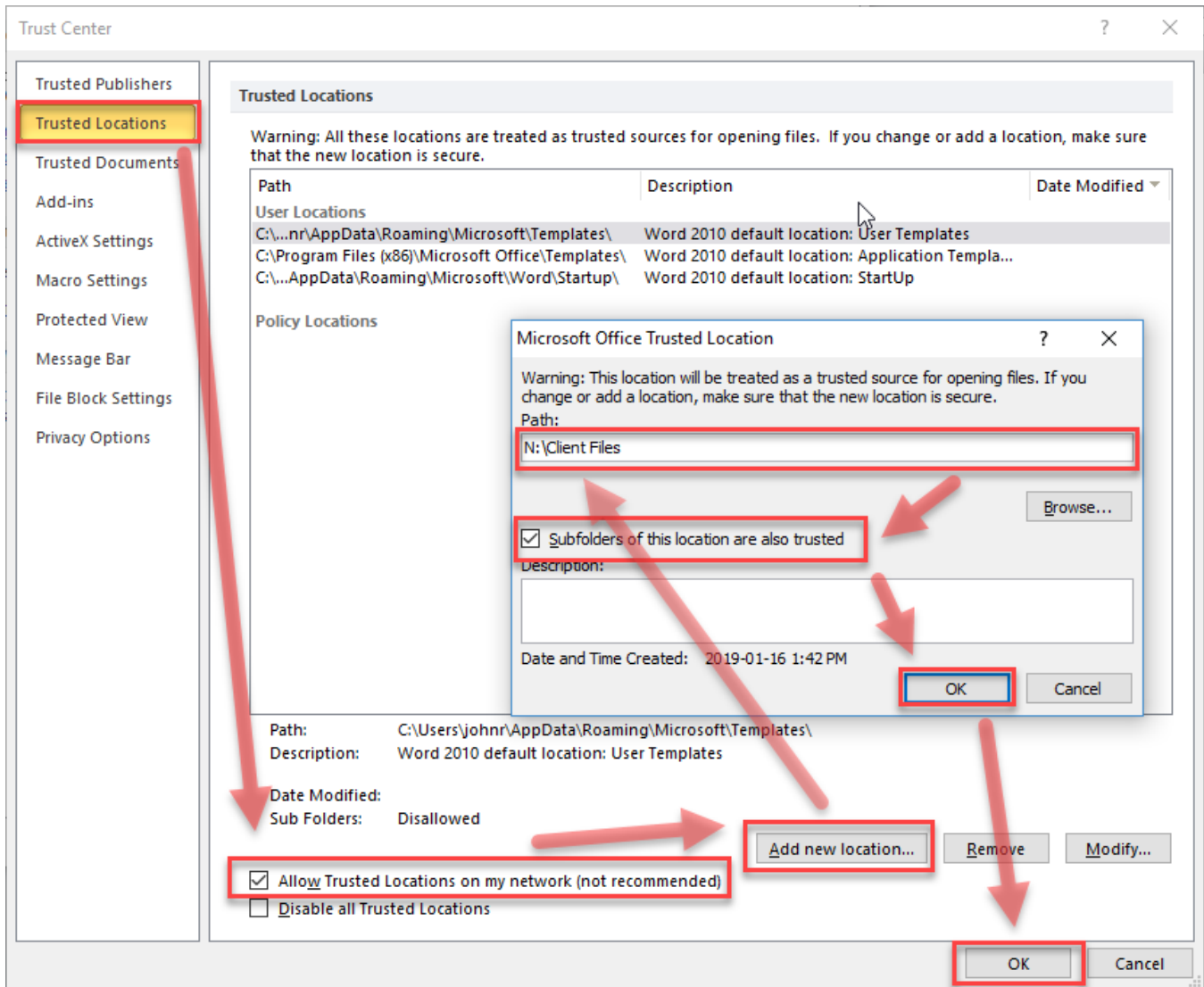


FIGURE 8-16

Options → Trust Center → Trust Center Settings Button  
 → File Block Settings

File Block Settings will trigger Protected View for all files of a particular type regardless of where they are located. Again, there is risk involved in disabling this feature. **Check with your system administrator before unchecking these boxes.** In particular, there have been prior issues with RTF files.

To have all file types open and allow editing without a prompt, under the **File Block Settings**, uncheck all of the check boxes and under **Open behavior for selected filed types**, select **Open selected file types in Protected View and allow editing**. See Figure 8-17.

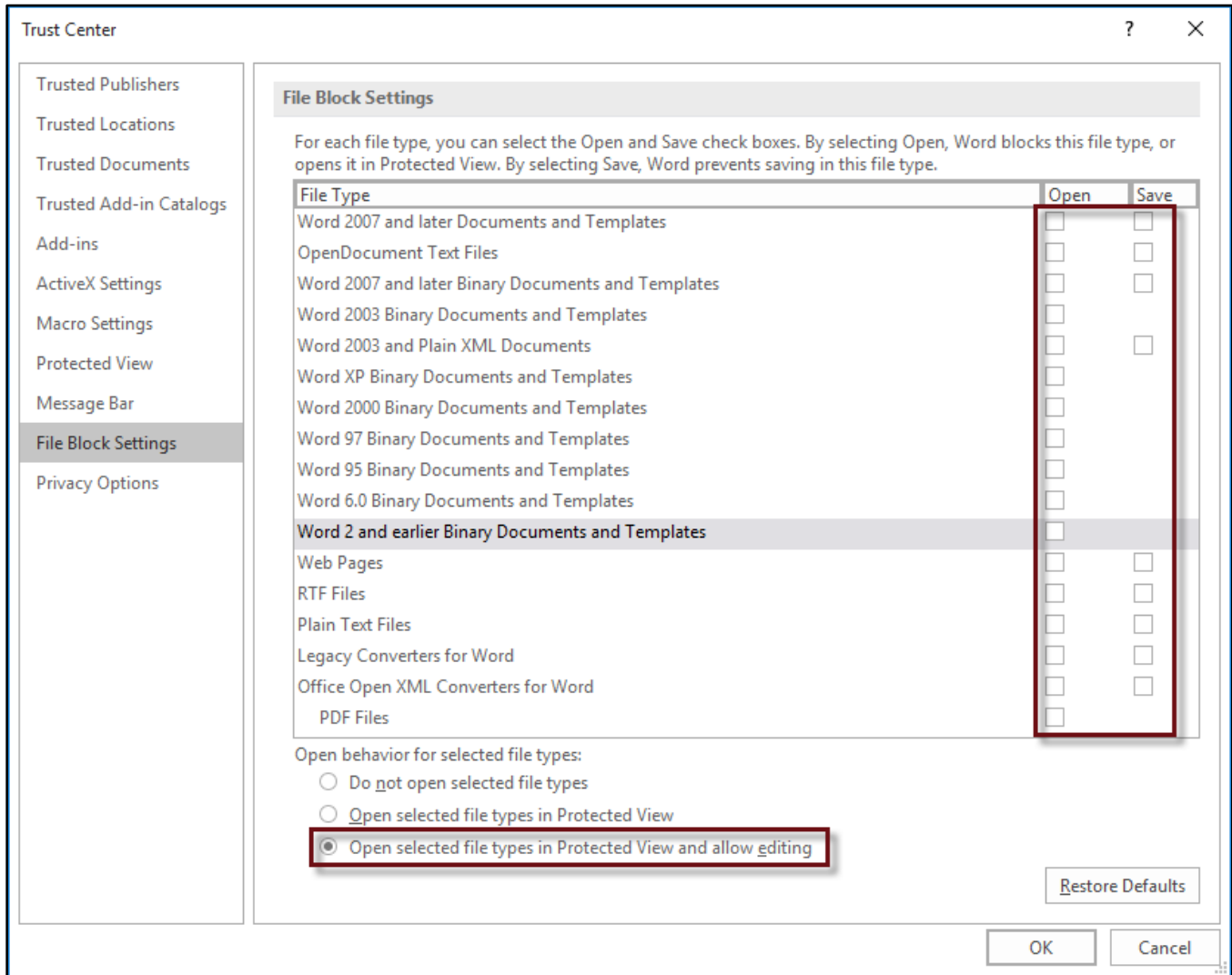


FIGURE 8-17



## Options → Trust Center → Trust Center Settings Button → Privacy Options

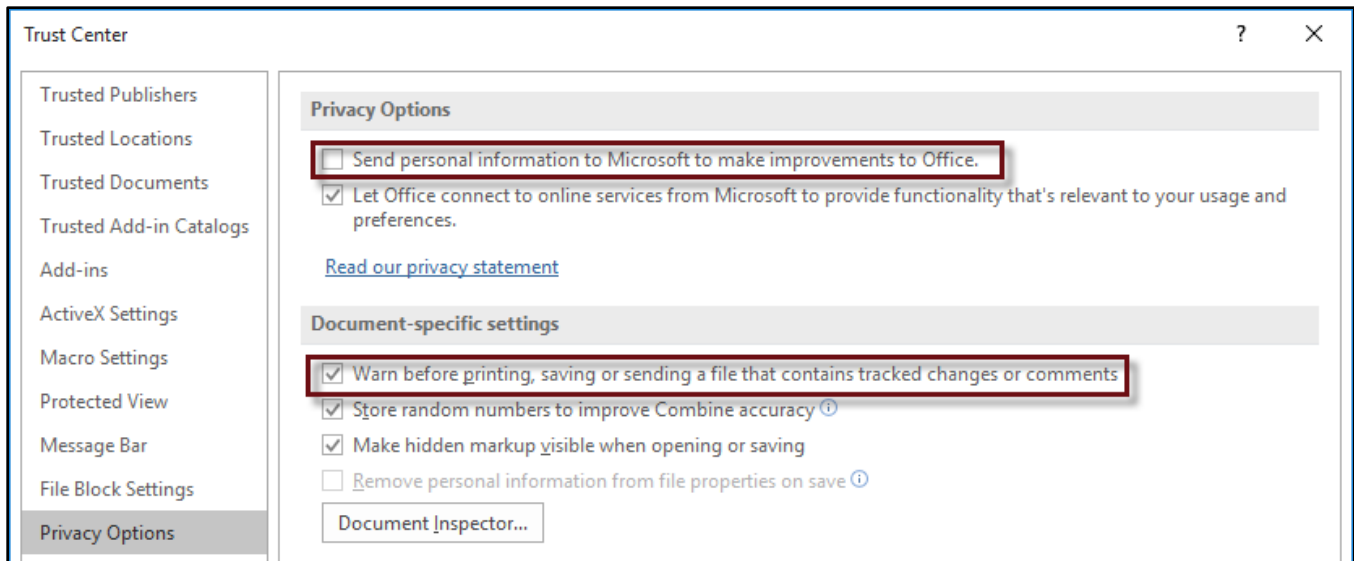


FIGURE 8-18

Go to the **Trust Center** and click the **Trust Center Settings button**. A new dialog will open. Click on **Privacy Options** and check **Warn before printing, saving or sending a file that contains tracked changes or comments**. Also clear the **Send personal information to Microsoft to make improvements to Office**.

## Lock In Your Setting Changes

Make sure that after you're doing with all of the foregoing changes that you click the **OK** button, **NOT Cancel** and **NOT** the **X** button in the top, right-hand corner of the dialog. That makes the changes stick. It's a good idea after you do this to exit Word, re-launch Word and spot check a couple of the settings to ensure that they're still modified. If the changes don't stick, there are a couple of reasons that could happen and I can help you figure out why. Just send me an email - info@affinityconsulting.com.

## Fix Track Changes Settings

There are a few changes you'll want to make to the Track Changes defaults. All of these changes begin on the **Review ribbon** in Word 2016.

### Change the Markup

By default, Word shows you **Simple Markup** which means that if you delete text, it literally disappears and a little red, vertical line appears in the left margin adjacent to the line where something was deleted. Of course, I not only want to know that something was deleted, but *what* was deleted. Therefore, switch from **Simple Markup** to **All Markup** (see below).

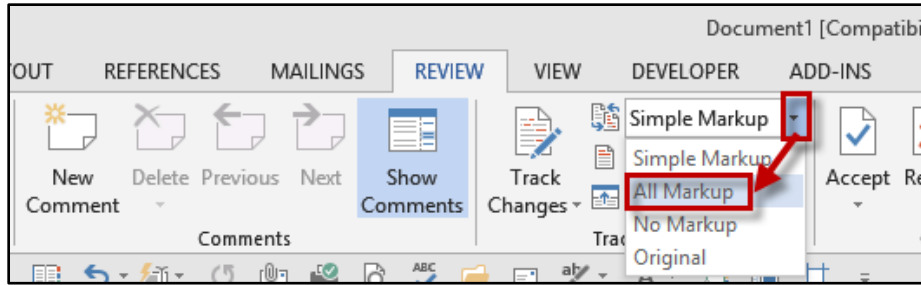


FIGURE 8-19

## Track Changes Options

In order to get to this dialog, click **Review ribbon | Tracking launcher**.

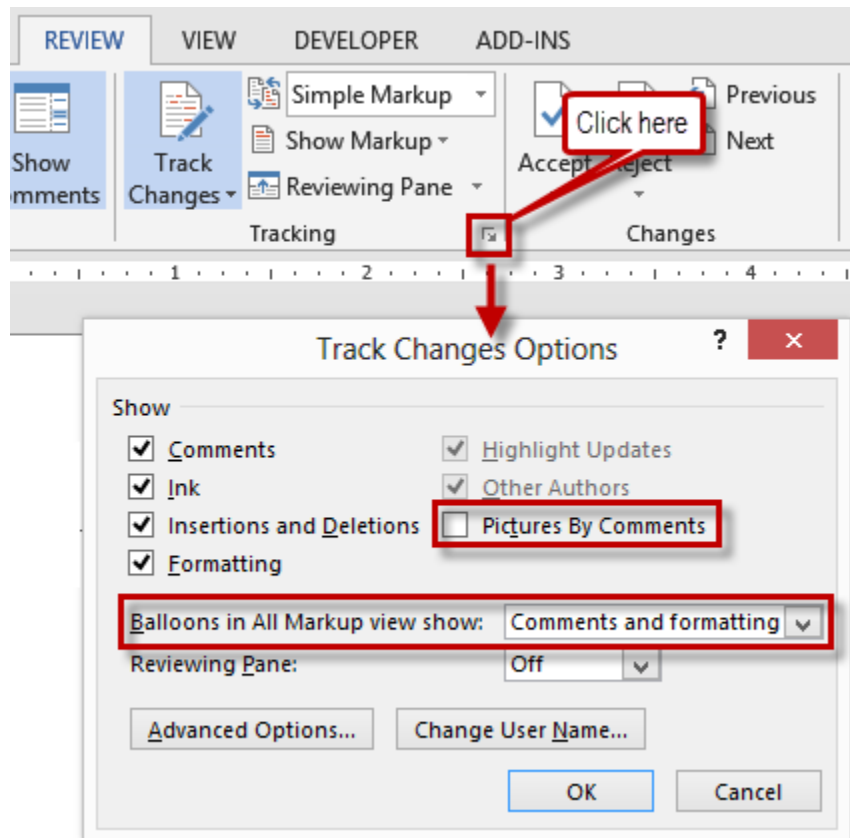


FIGURE 8-20

- Clear **Pictures By Comments** (unnecessary and clutters up the comment screen).
- **Balloons are best used for Comments and Formatting only**: not Revisions which is the default setting.

# CHAPTER 9

# DEFAULT SETTING

# CHANGES FOR WORD 2019

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

## In General

**NOTE** that you get to all of the following screens by clicking the File menu → Options.

## Options → General

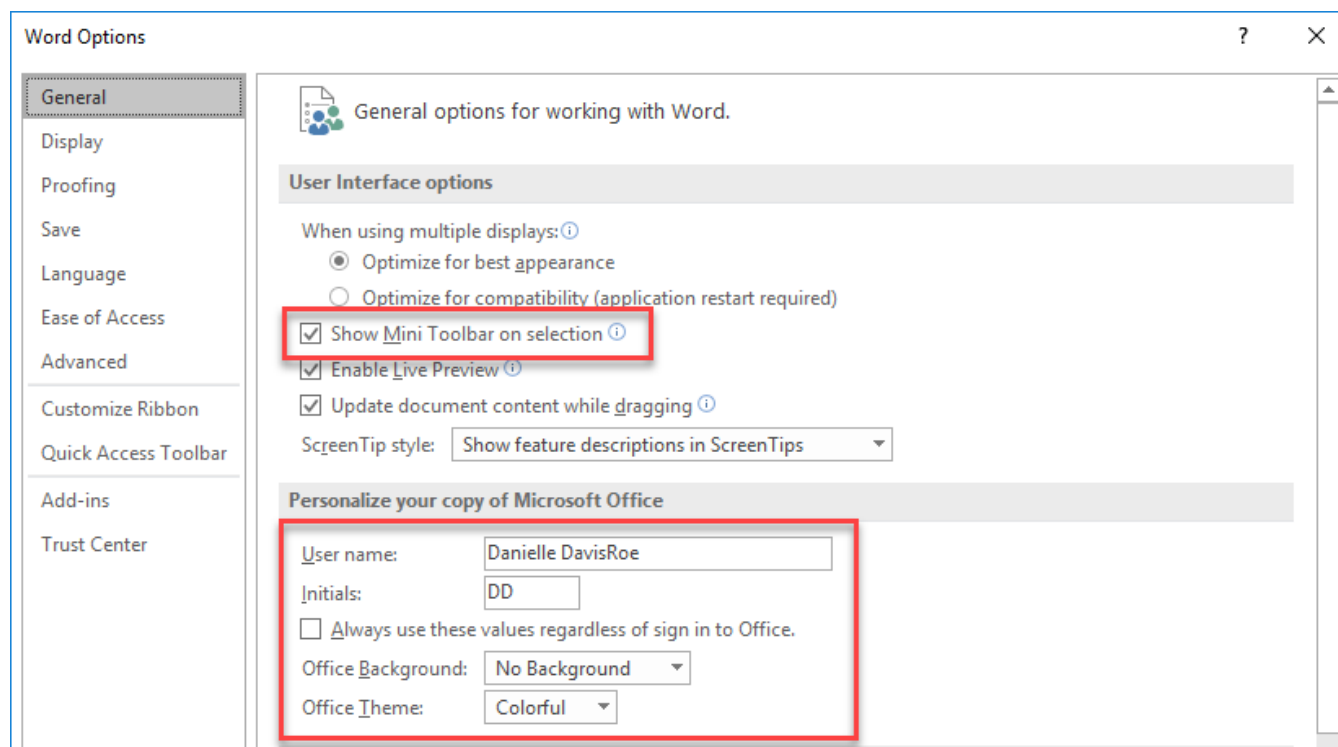


FIGURE 9-1

- Uncheck **Show Mini Toolbar on selection**. This controls whether an additional pop up window with common font options is displayed whenever text is selected. This can be distracting and cover up part of the document. Therefore, uncheck this box.
- **Personalization**: Make sure your name and initials are in the **User name** and **Initials** boxes. Check **Always use these values...** and choose an **Office Background** and **Office Theme**. The background is the frankly silly graphic that appears at the top, right-hand corner of the Word screen. You had a chance to choose something during

installation but you may want to change it now that you've seen it. The default Office Theme of stark, blinding white might not be what you would like. I recommend you change it to Colorful.

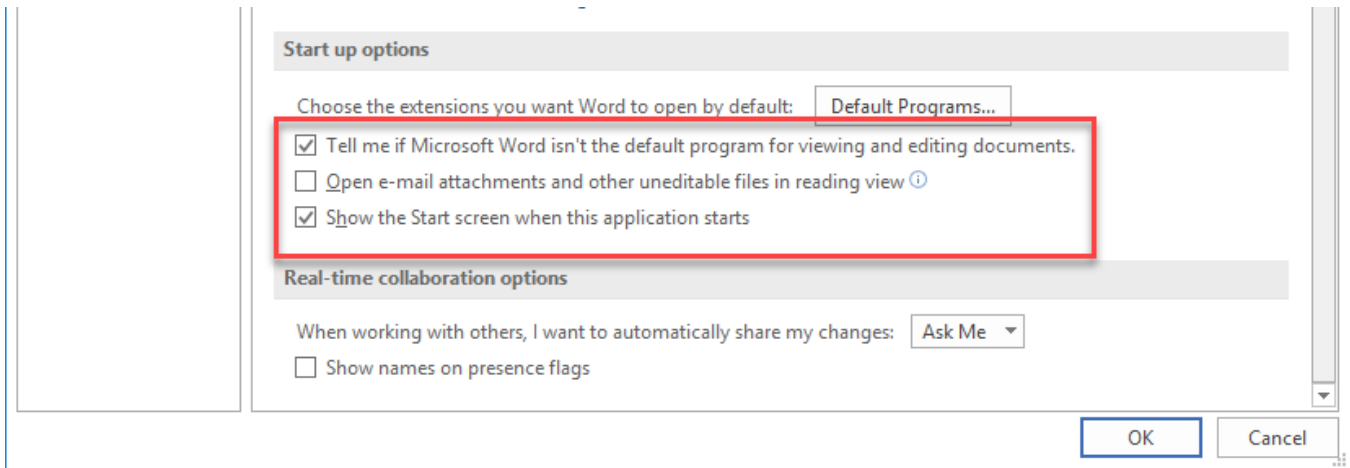


FIGURE 9-2

- **Tell me if Word isn't default program for viewing and editing documents:** This is just annoying, particularly if you just don't want Word to be your default.
- **Open e-mail attachments in Reading View:** Clear this so attachments open normally.
- **Get Rid of the Start Screen.** This is the giant template selection screen that opens whenever you open Word. If you would prefer to go directly to a blank document when you open Word, clear the **Show the Start Screen when this application starts** box.

## Options → Display

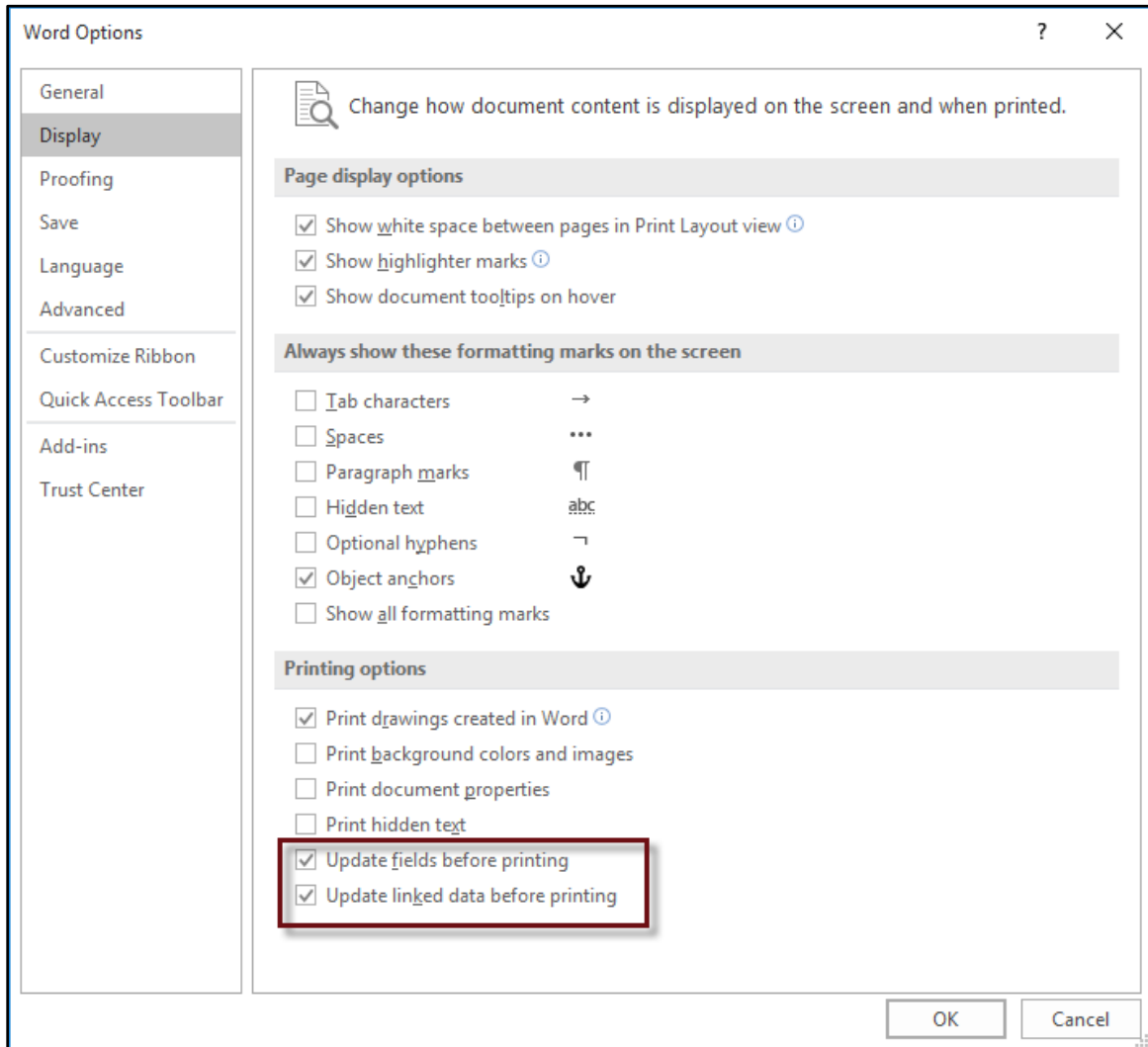


FIGURE 9-3

- Check **Update fields before printing**. Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.
- Check **Update linked data before printing**. This will make sure that all linked files are updated before printing.

## Options ➔ Proofing

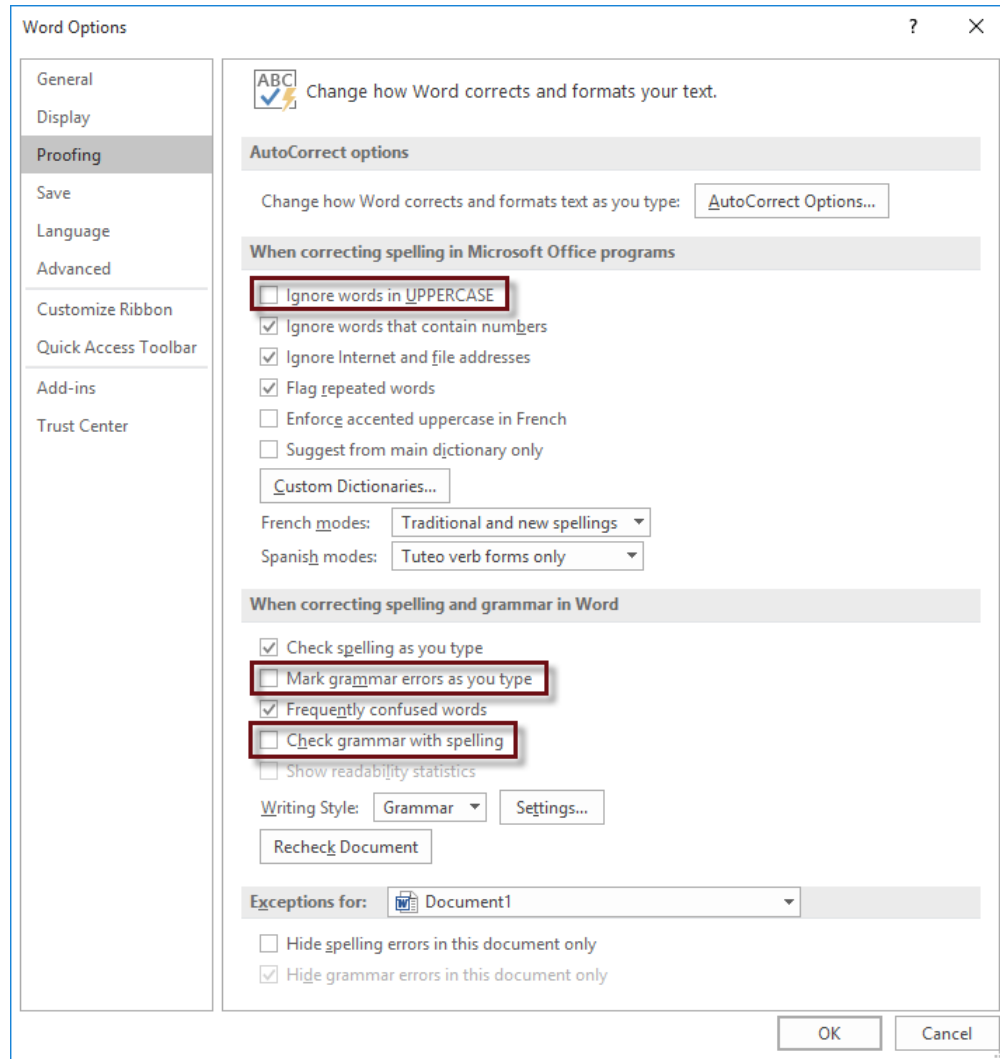


FIGURE 9-4

- Uncheck **Ignore words in UPPERCASE**. Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.
- Uncheck **Mark grammar errors as you type**. This will eliminate the green squiggly lines in the document.
- Uncheck/Check **Check grammar with spelling**. Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

## Options ➔ Proofing and Autocorrect

Next, go to **Proofing** and click on **Autocorrect Options** button. This will launch the **Autocorrect Options dialog**.

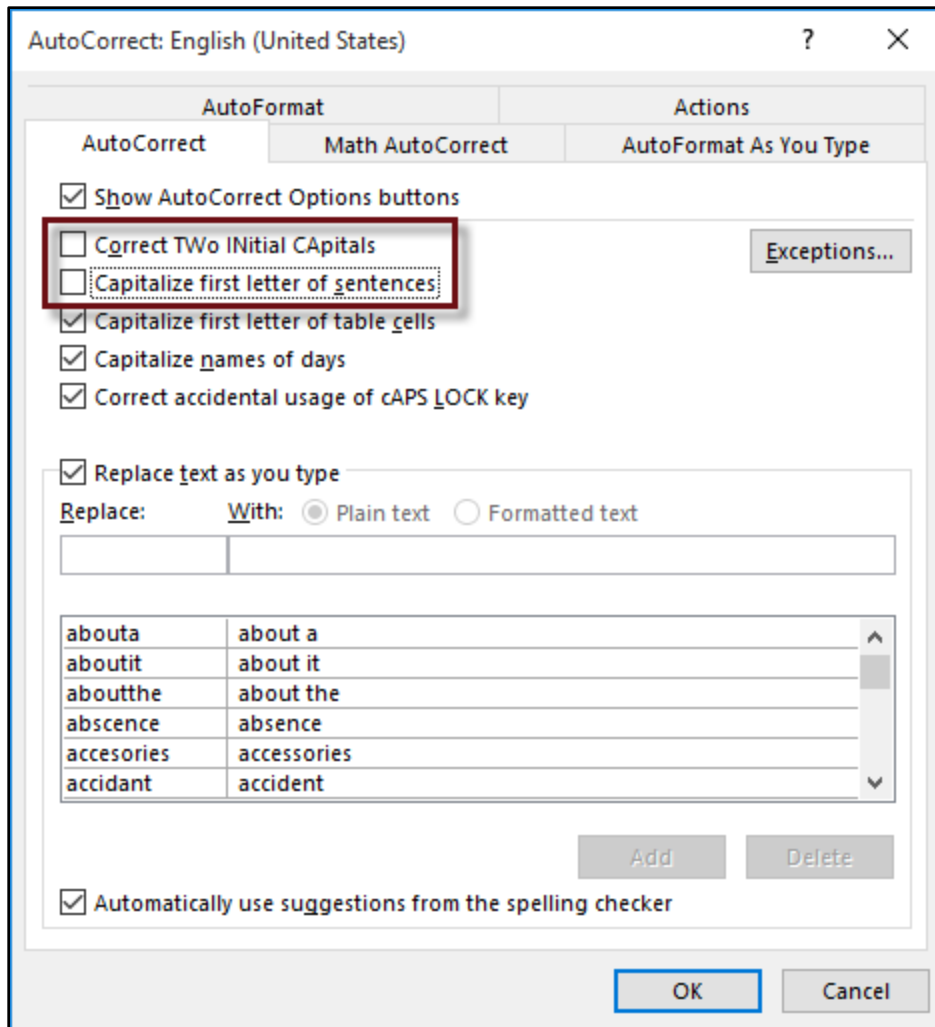


FIGURE 9-5

Uncheck **Correct Two Initial Capitals** and **Capitalize first letter of sentences** as most people find that annoying because they MEANT to do it (IDs or cc:). **Note:** you can also delete the AutoCorrect entries in the list at the bottom of the dialog which replaces (c) with © and (r) with ®.

Next click on the **AutoFormat As You Type** tab.

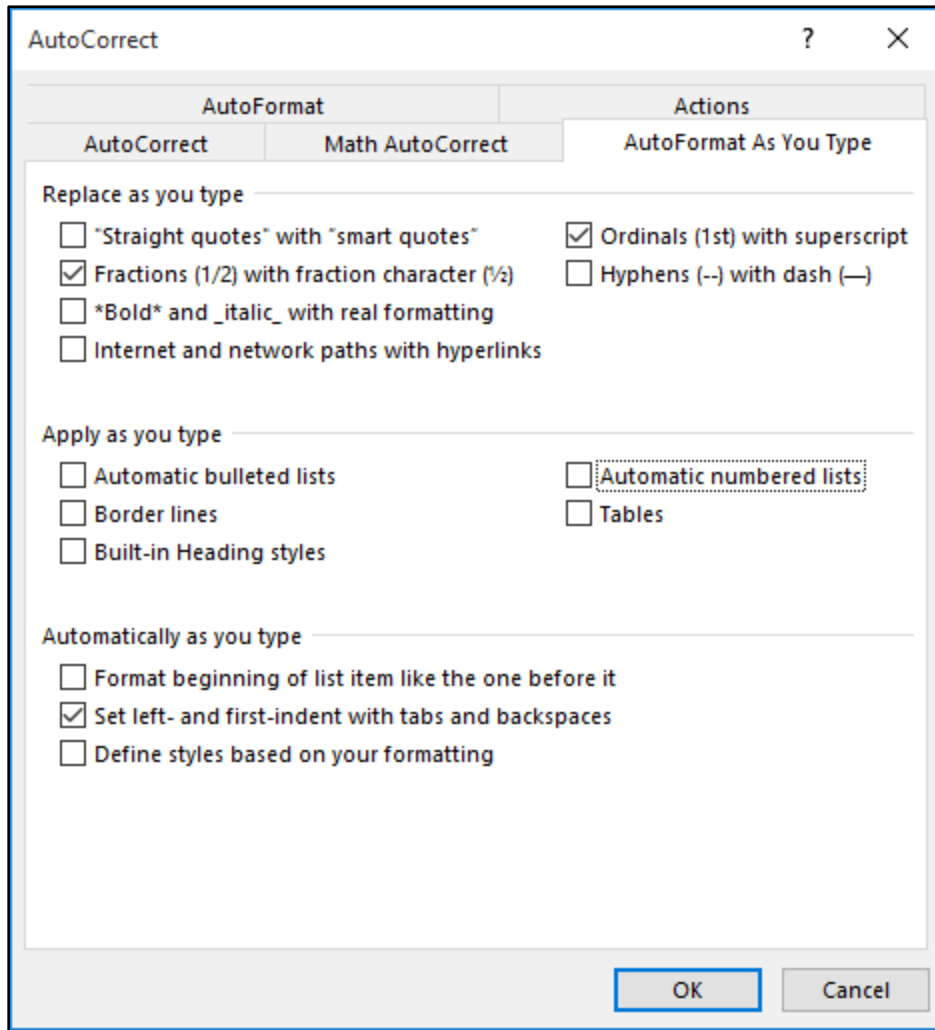


FIGURE 9-6

Uncheck everything except **Ordinals**, **Fractions** and **Set left and first indent with tabs and backspaces**. Optional items include checking **Internet and network paths with hyperlinks** will create clickable hyperlinks to internet addresses, so that a person opening the document can click on the link and go to the web address right from the document. You might also check the **Straight quotes with smart quotes** but keep in mind that this may result in your quotation marks getting converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

Be sure to uncheck everything else of this page!! The **Apply as you type section** causes Word to guess what is being typed and start inserting bulleted lists and tables on its own without any prompting to do so. Also be sure to uncheck **Define styles based on your formatting**. This option causes Word to create styles on its own.



Finally, click on the **AutoFormat** tab.

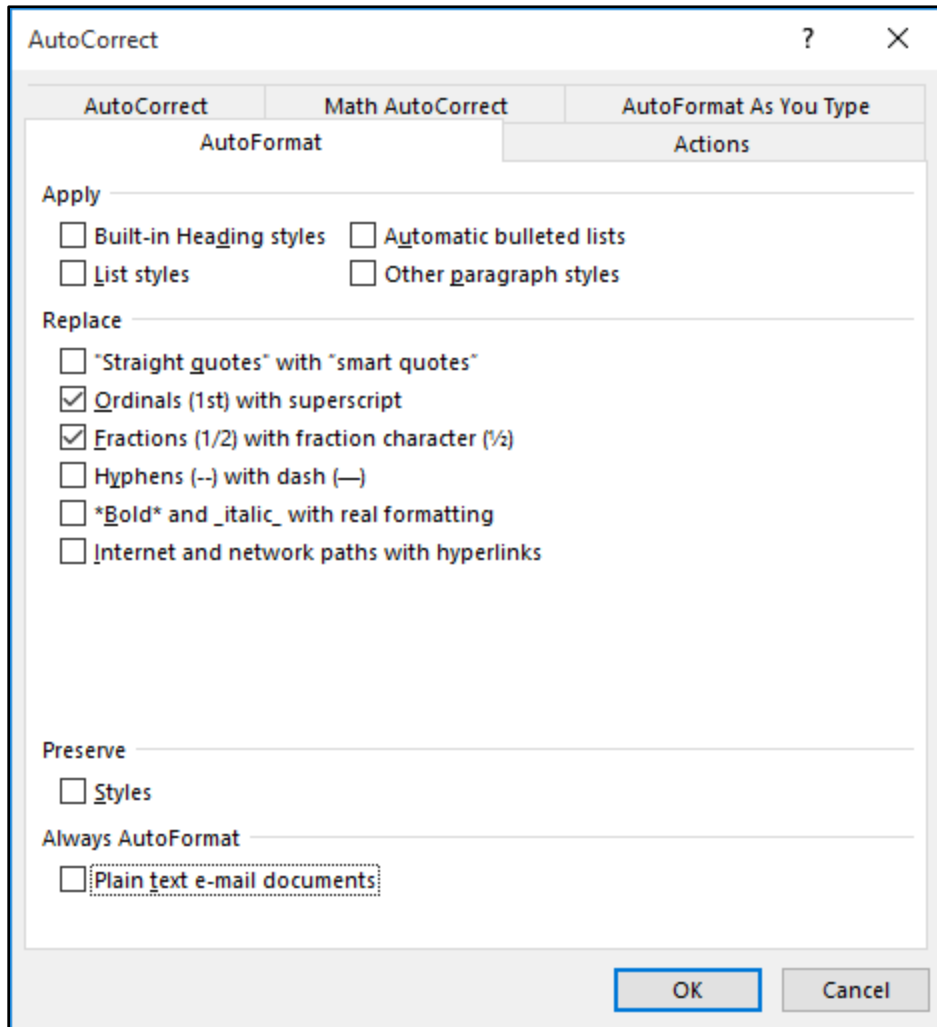


FIGURE 9-7

Make these options match the **AutoFormat As You Type** options.

At this point, make sure to click the **OK** button or all of the changes will be lost.

## Options → Save

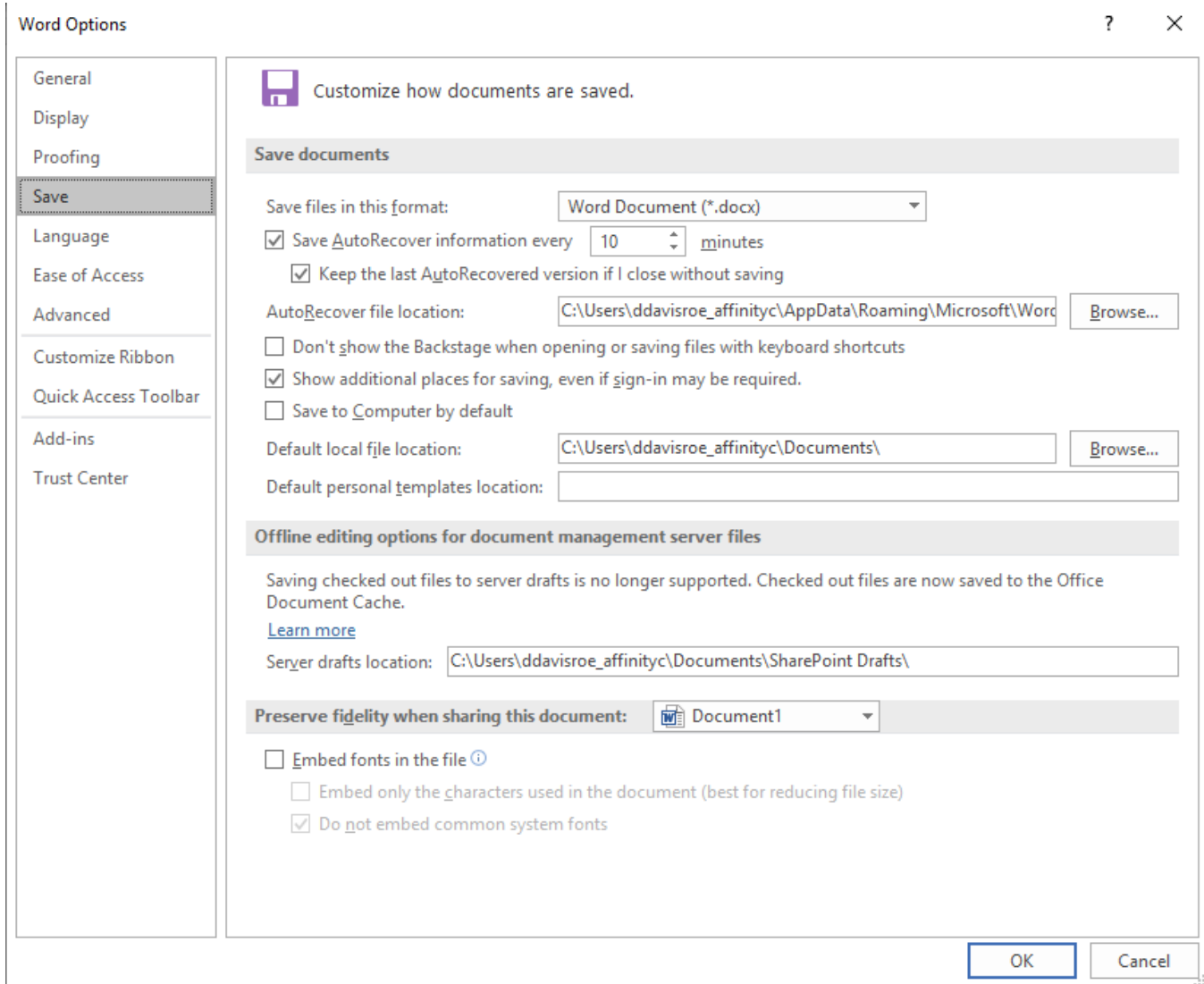


FIGURE 9-8

- **Save AutoRecover information:** Reduce this to **5 minutes** rather than 10 minutes. More frequency is a good thing.
- **Don't show the Backstage when opening or saving files with keyboard shortcuts:** If you want Word to go directly to the open or save browse screens when you open or save a file using keyboard shortcuts (Ctrl + O and Ctrl + N), then check this box. There is no longer a setting to go directly to the open or save browse screens when clicking on the File menu.
- **Show additional places for saving, even if sign-in may be required:** This is just a waste of space on your save screen, so clear this box.
- **Save to Computer by default:** Microsoft really wants you to save everything to OneDrive and you probably don't want to. Therefore, check this box.



## Options → Advanced → Cut, Copy and Paste

Note that in this area you can control the default paste action in a variety of circumstances. When copying from other programs (such as a browser), we recommend that you strip all formatting off of the source text. By changing the setting shown below, this will always be the case. You may want to change some of the other settings as well depending upon how you work.

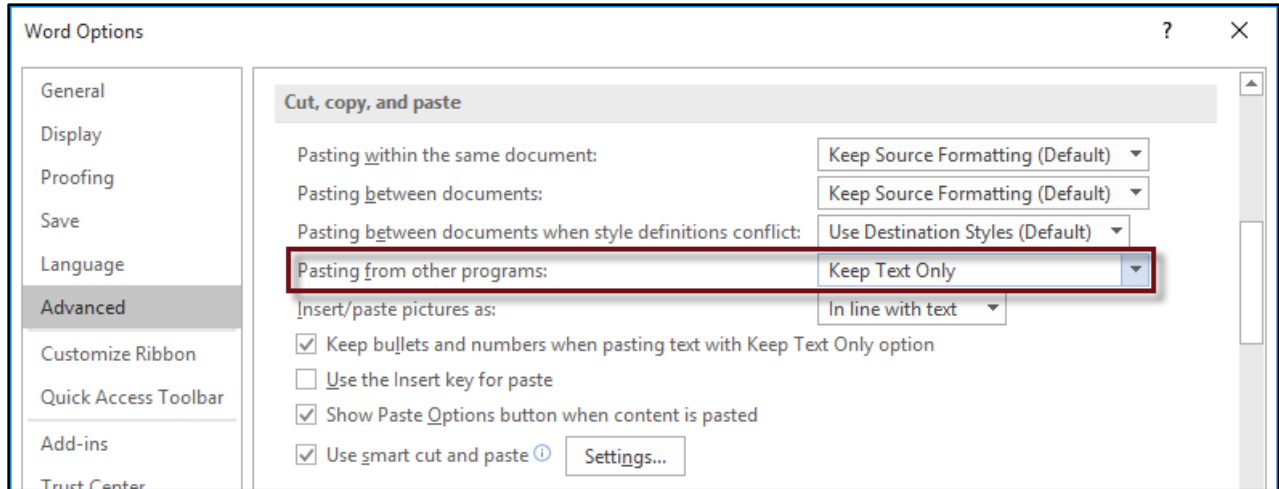


FIGURE 9-10

## Options → Advanced → Show Document Content

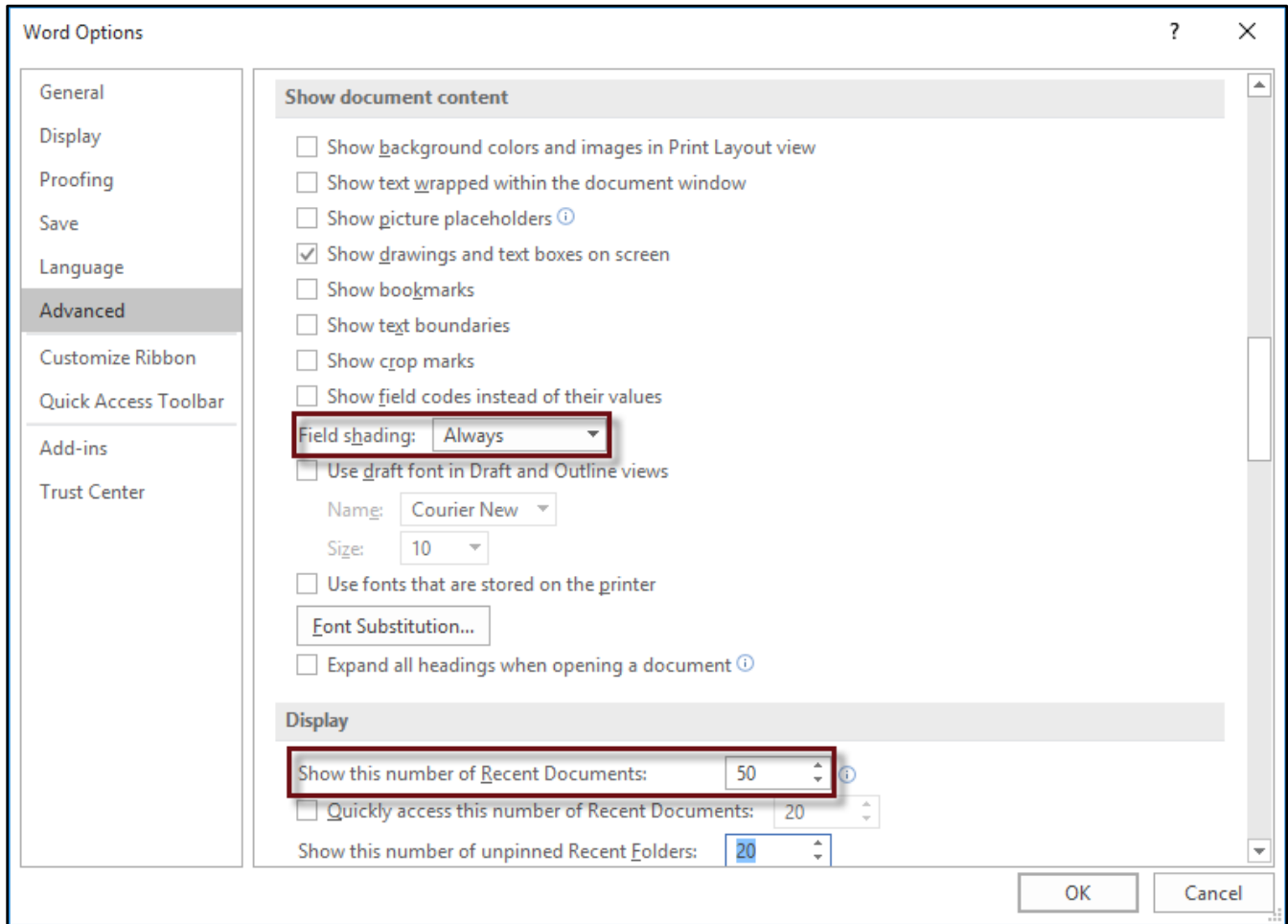


FIGURE 9-11

- Change **Field shading** to **Always**.
- Change **Show this number of Recent Documents** to your preference.

## Options → Advanced → Fidelity & General

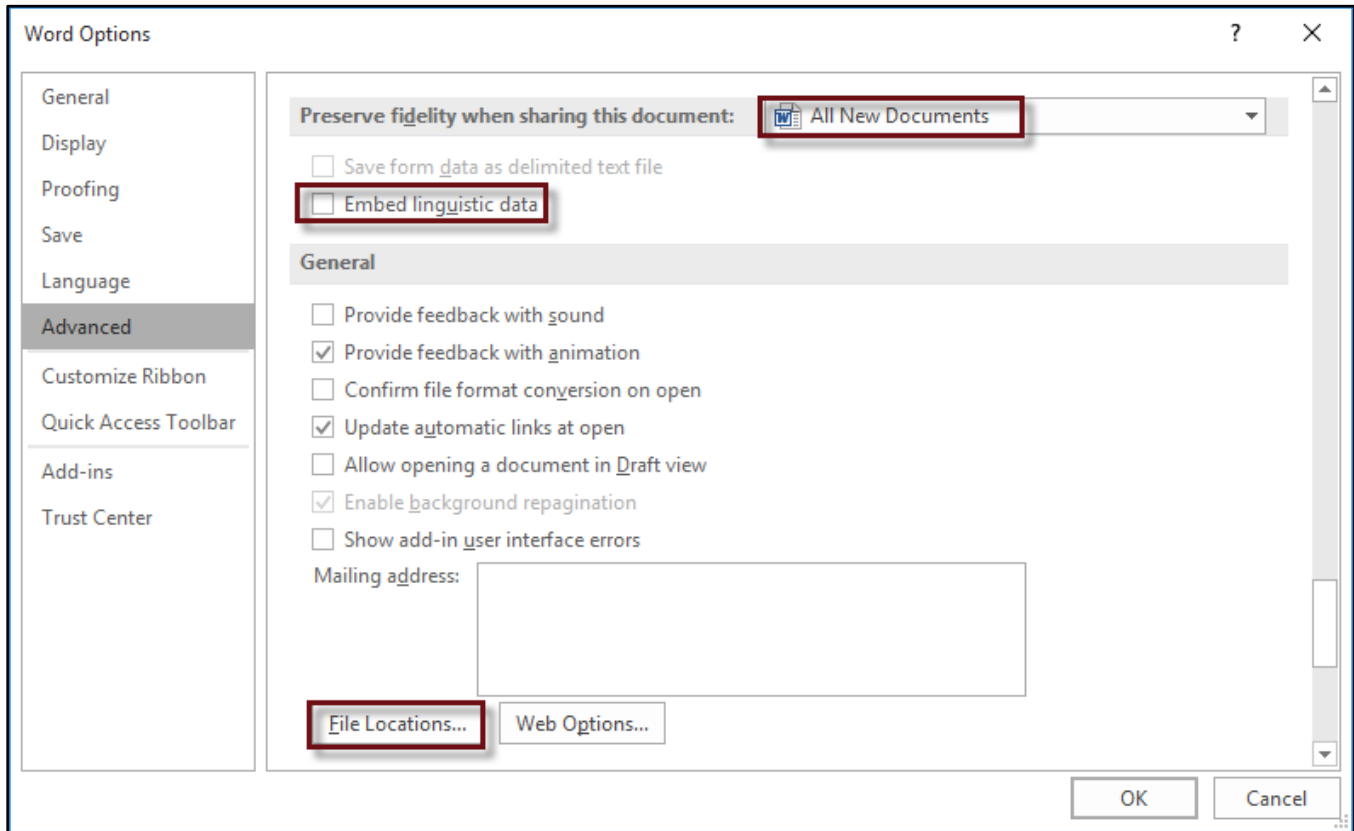


FIGURE 9-12

- Change the heading in **Preserve fidelity when sharing this document** to **All New Documents** (so the setting change applies to all future documents) and clear the **Embed linguistic data** box. "Linguistic data" refers to things like speech (from text-to-speech or speech-to-text applications or add-ins) and handwriting. You're probably not using either of those things so embedding them only makes the file-sizes bigger (unnecessarily).
- Click **File Locations** and make sure that Word is defaulted to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.

## Options ➔ Advanced ➔ Layout Options

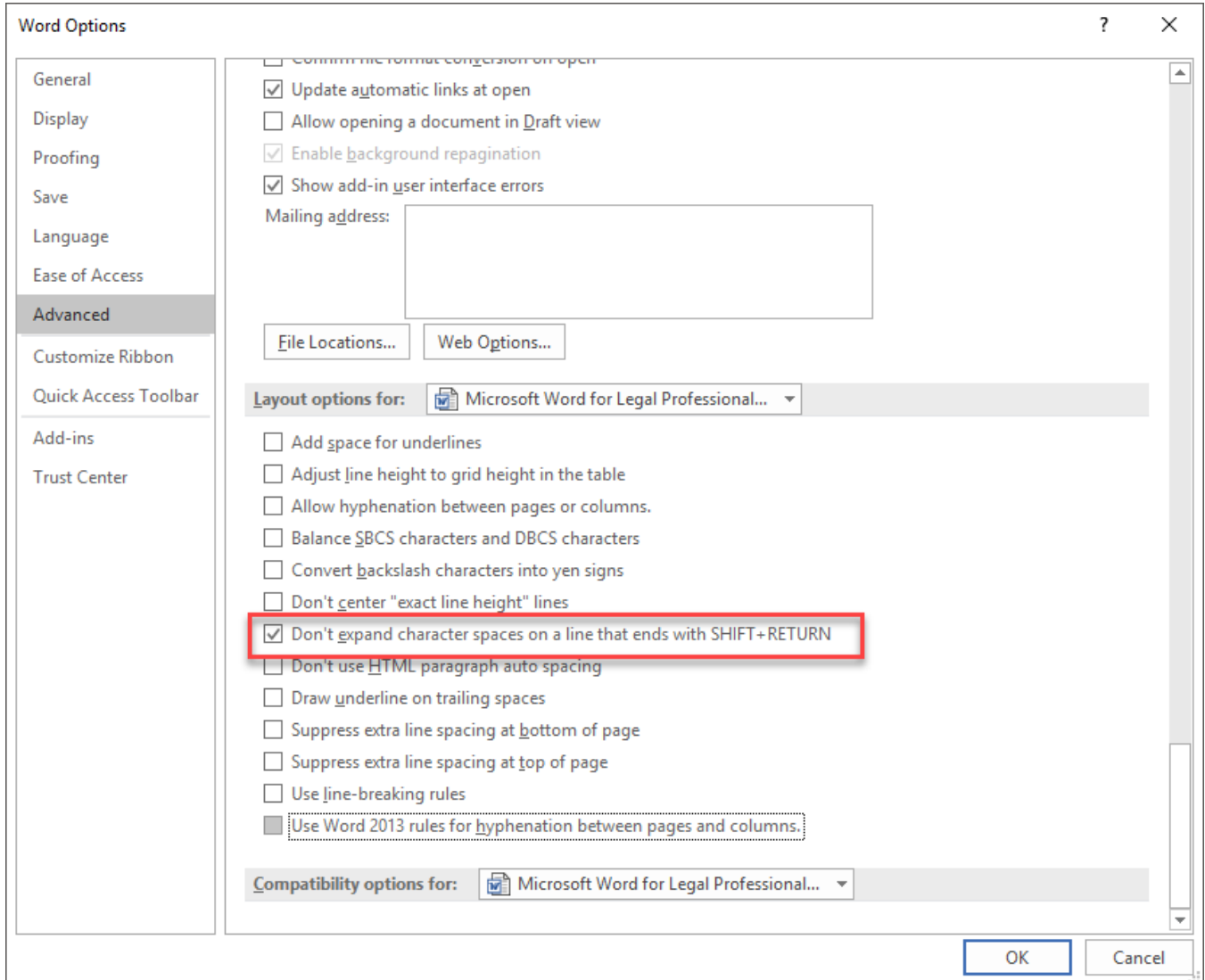
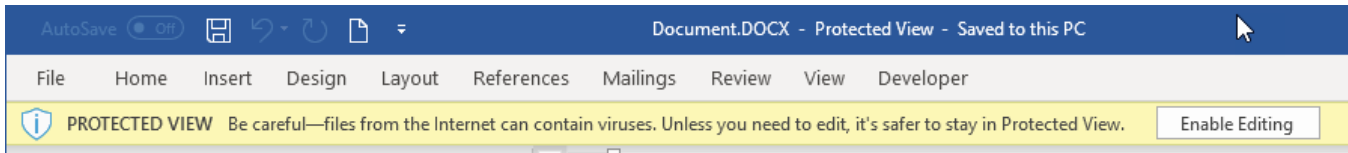


FIGURE 9-13

Check **Don't expand character spaces on a line that ends with SHIFT-RETURN** because this is the number one reason that a few words will be spread across the entire line with giant gaps between each word. For your information, Shift + Return = "soft return" which tricks Word into thinking that what appears to be two lines of text are actually one line of text.

## Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Protected View

By default Protected View is enabled. When enabled, Word displays a warning if the Word document was created on a different system. While the warning is displayed, the file may only be viewed, not edited. To edit the document, you must click the **Enable Editing button**.



Protected View disables all of the active content in the document and reduces the risk of infection from a worm, virus, or other malware that could be embedded in an unknown document.

If protected view bothers you, you may disable it. Yes, there is risk involved in disabling it. **You should check with your system administrator prior to unchecking these boxes.** To change these settings, go to **Protected View** and uncheck one or all of the boxes. See Figure 9-14.

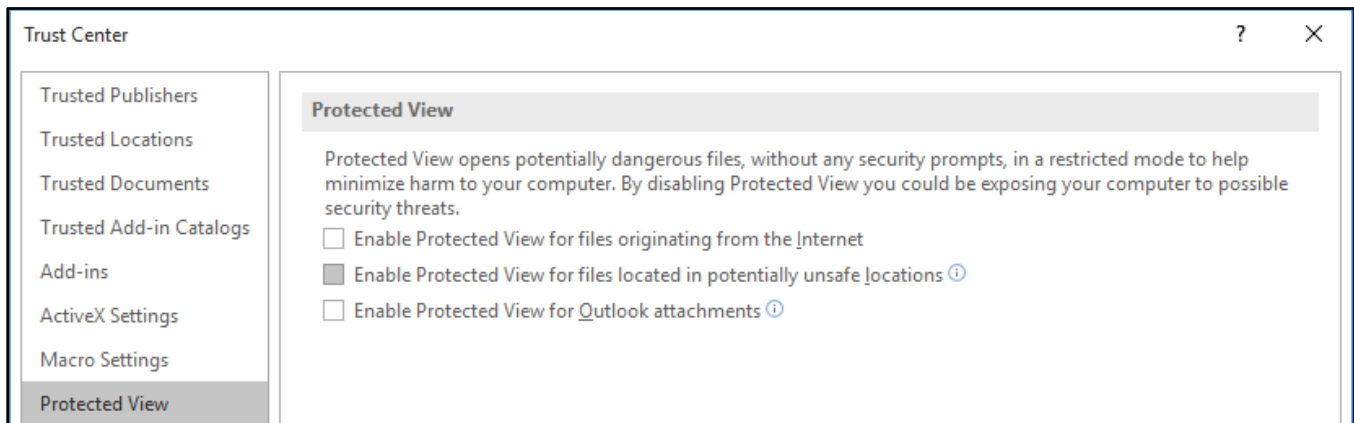


FIGURE 9-14

These boxes enable protected view, unchecking them disables the protection.

**Enable Protected View for files originating from the Internet.** This should probably remain checked. If you download a Word document from a web page, or anywhere else from the internet, you will probably want the Protected View protection.

**Enable Protected View for files located in potentially unsafe locations.** This is the main cause of triggering Protected View when opening a file from a network folder. You may disable this, but you may want to make your network server a "Trusted Location" instead. (See Trusted Location, below.) Unchecking this box also disables Protected View from other locations, such as USB thumb drives.

**Enable Protected View for Outlook attachments.** With this checked, you will receive a protected view warning for every Word document that you open as an attachment from Outlook. Unchecking this box turns off the protection.

**NOTE:** In addition to these settings, Windows may "block" Outlook attachments that you save to your file system. To unblock them, you must right-click the file, select **Properties**, check the **Unblock box** (on some systems this appears as a button instead of a checkbox), and click **OK**:



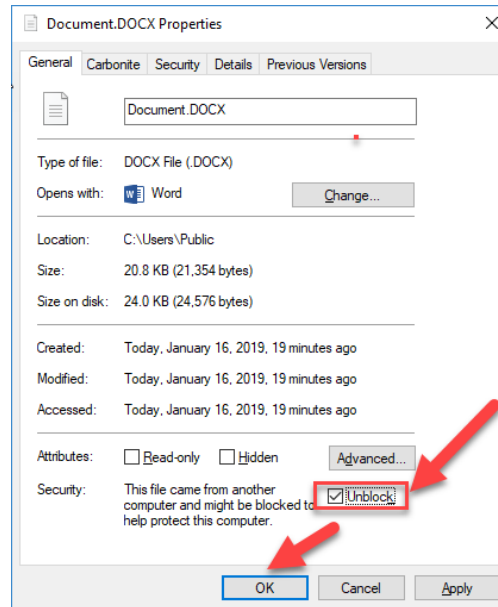


FIGURE 9-15

## Options → Trust Center → Trust Center Settings Button → Trusted Locations

Trusted Locations are for folders on your system or on your network that you trust. Adding a folder or network share as a Trusted Location completely disables all of the Trust Center checks and protections for that location. To add a folder such as "N:\Client Files" as Trusted Location:

7. Go to File → Options → Trust Center → Trust Center Settings → Trusted Locations.
8. Check the **Allow Trusted Locations on my network**. You will not be able to enter a network location without checking this box.
9. Click **Add new location**, enter the path of the folder and check **Subfolders of this location are also trusted**. Then click **OK** and **OK**. All documents in that folder will now be trusted, and the Trust Center will no longer check them.

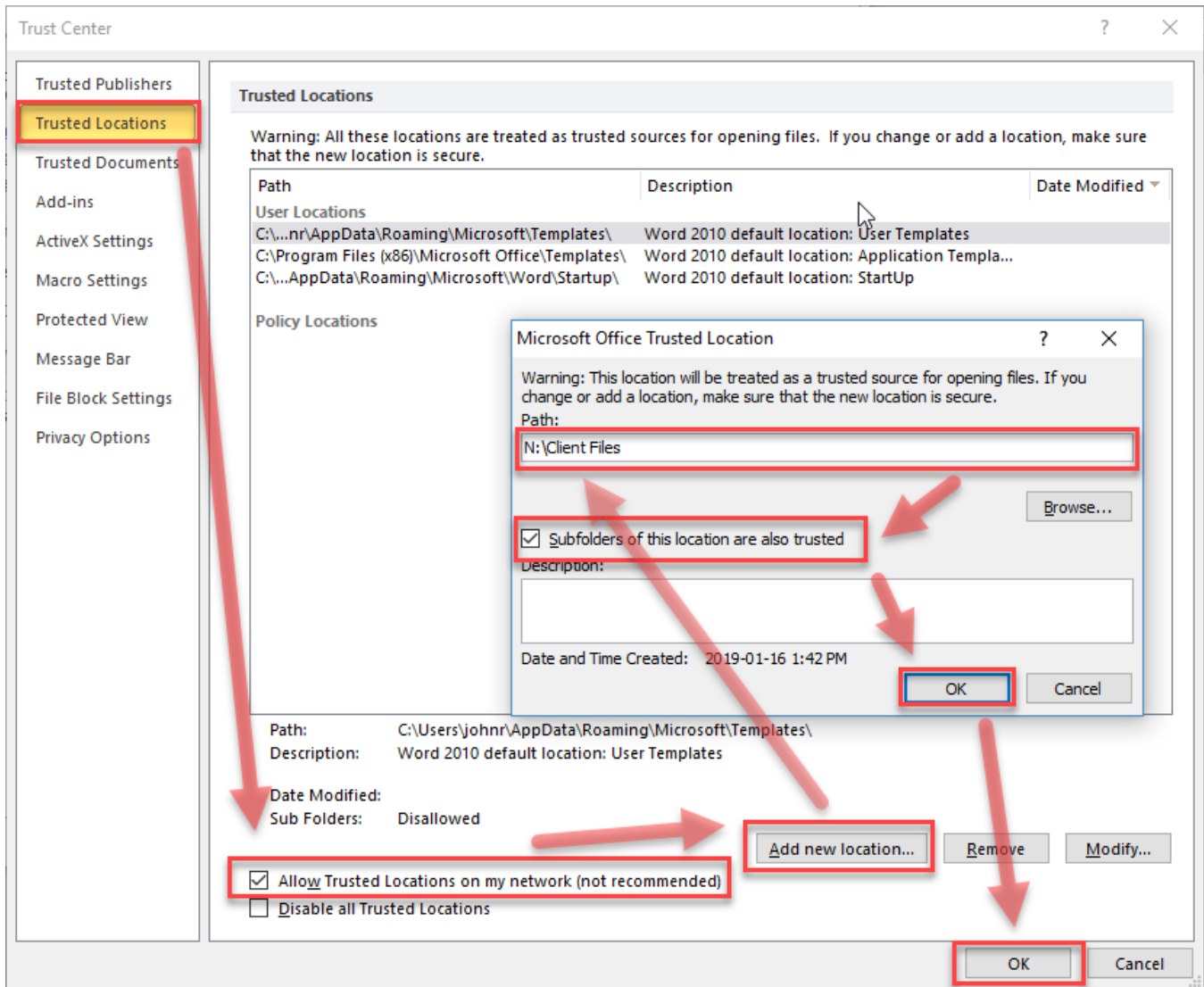


FIGURE 9-16

Options → Trust Center → Trust Center Settings Button  
 → File Block Settings

File Block Settings will trigger Protected View for all files of a particular type regardless of where they are located. Again, there is risk involved in disabling this feature. **Check with your system administrator before unchecking these boxes.** In particular, there have been prior issues with RTF files.

To have all file types open and allow editing without a prompt, under the **File Block Settings**, uncheck all of the check boxes and under **Open behavior for selected filed types**, select **Open selected file types in Protected View and allow editing**. See Figure 9-17.

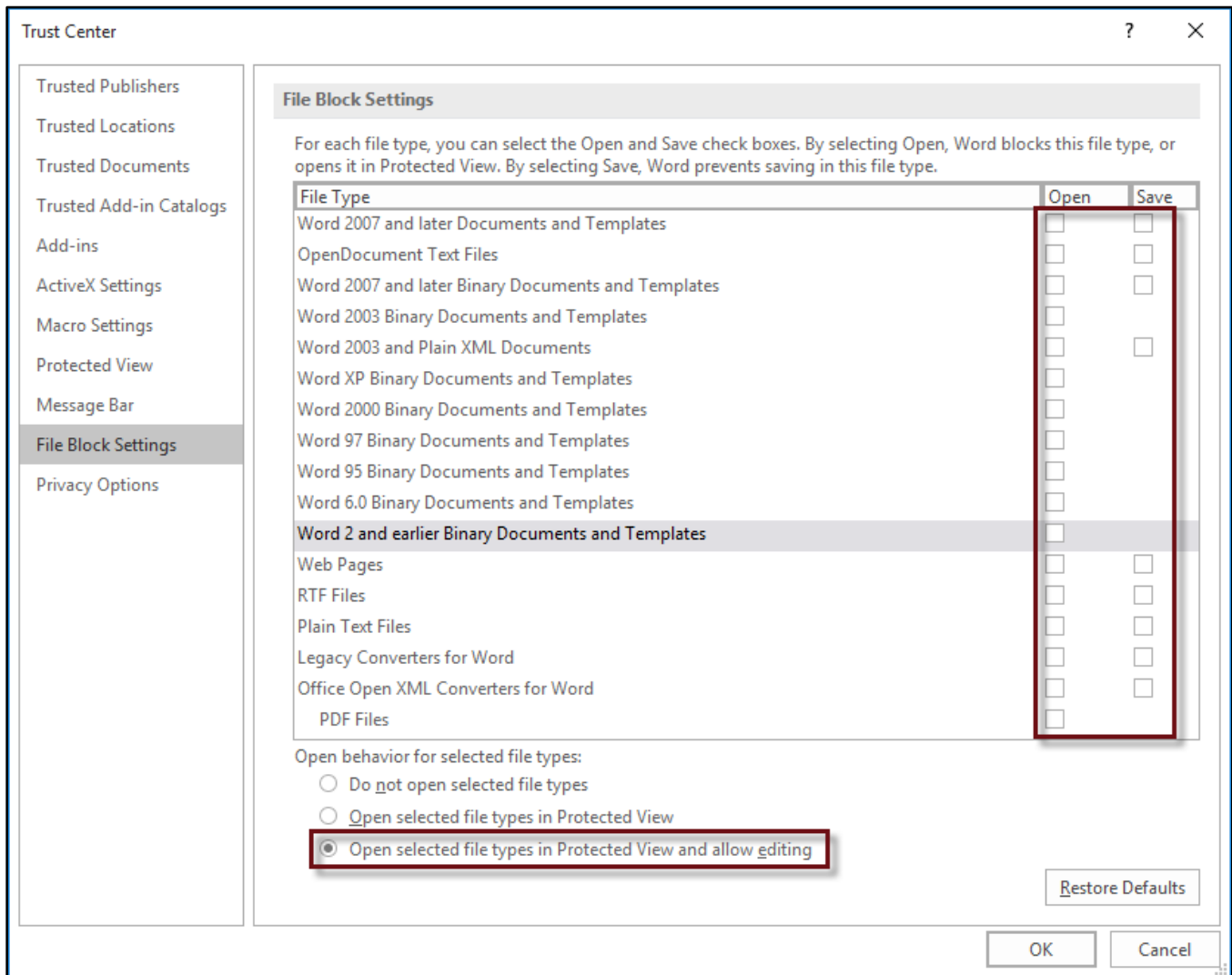


FIGURE 9-17

## Options → Trust Center → Trust Center Settings Button → Privacy Options

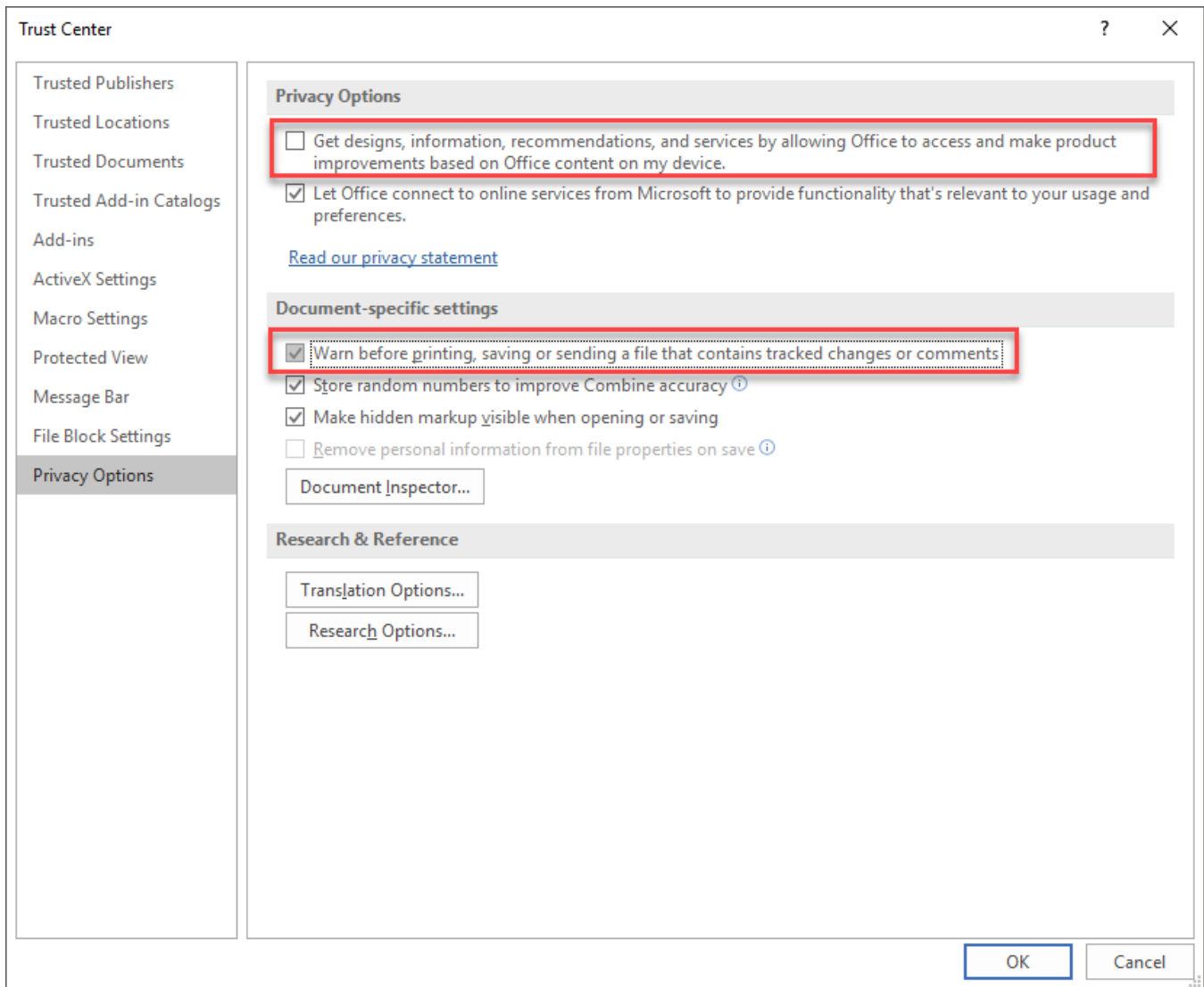


FIGURE 9-18

Go to the **Trust Center** and click the **Trust Center Settings** button. A new dialog will open. Click on **Privacy Options** and check **Warn before printing, saving or sending a file that contains tracked changes or comments**. Also clear the **Send personal information to Microsoft to make improvements to Office**.

### Lock In Your Setting Changes

Make sure that after you're doing with all of the foregoing changes that you click the **OK** button, **NOT Cancel** and **NOT the X button** in the top, right-hand corner of the dialog. That makes the changes stick. It's a good idea after you do this to exit Word, re-launch Word and spot check a couple of the settings to ensure that they're still modified. If the changes don't stick, there are a couple of reasons that could happen and I can help you figure out why. Just send me an email - info@affinityconsulting.com.

## Fix Track Changes Settings

There are a few changes you'll want to make to the Track Changes defaults. All of these changes begin on the **Review ribbon** in Word 2016.

### Change the Markup

By default, Word shows you **Simple Markup** which means that if you delete text, it literally disappears and a little red, vertical line appears in the left margin adjacent to the line where something was deleted. Of course, I not only want to know that something was deleted, but *what* was deleted. Therefore, switch from **Simple Markup** to **All Markup** (see below).

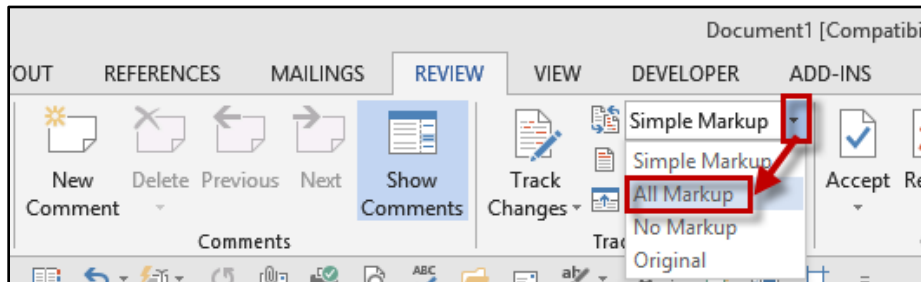


FIGURE 9-19

### Track Changes Options

In order to get to this dialog, click **Review ribbon | Tracking launcher**.

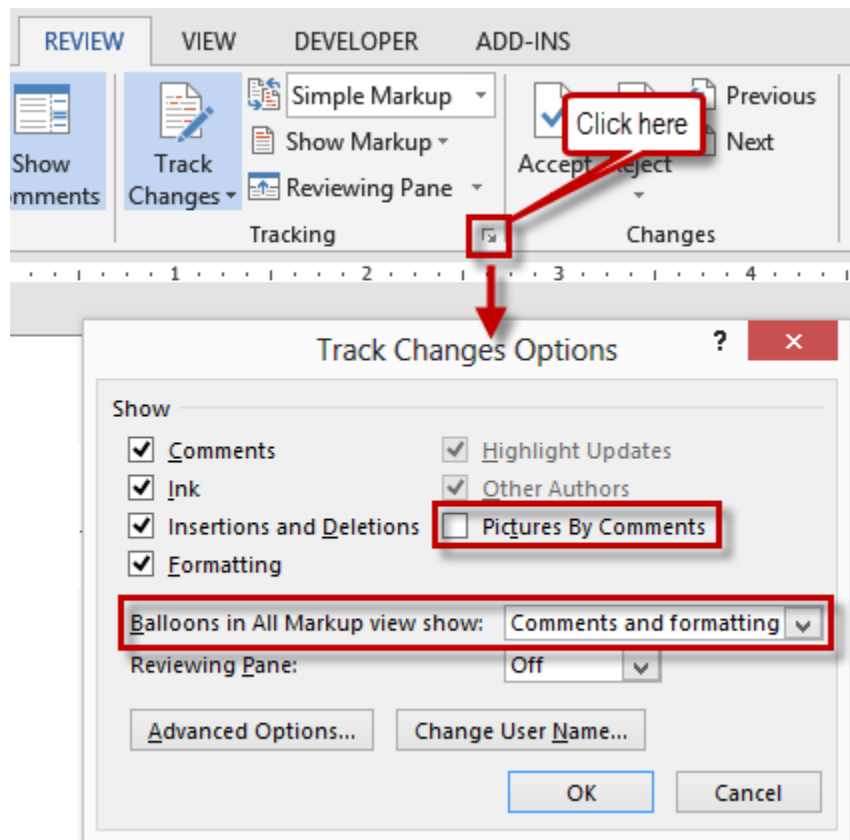


FIGURE 9-20

- Clear **Pictures By Comments** (unnecessary and clutters up the comment screen).
- **Balloons are best used for Comments and Formatting only:** not Revisions which is the default setting.

# CHAPTER 10

# DEFAULT SETTING

# CHANGES FOR WORD FOR

# MICROSOFT 365/2021

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

## In General

**NOTE** that you get to all of the following screens by clicking the **File menu** → **Options button**.

## Options → General

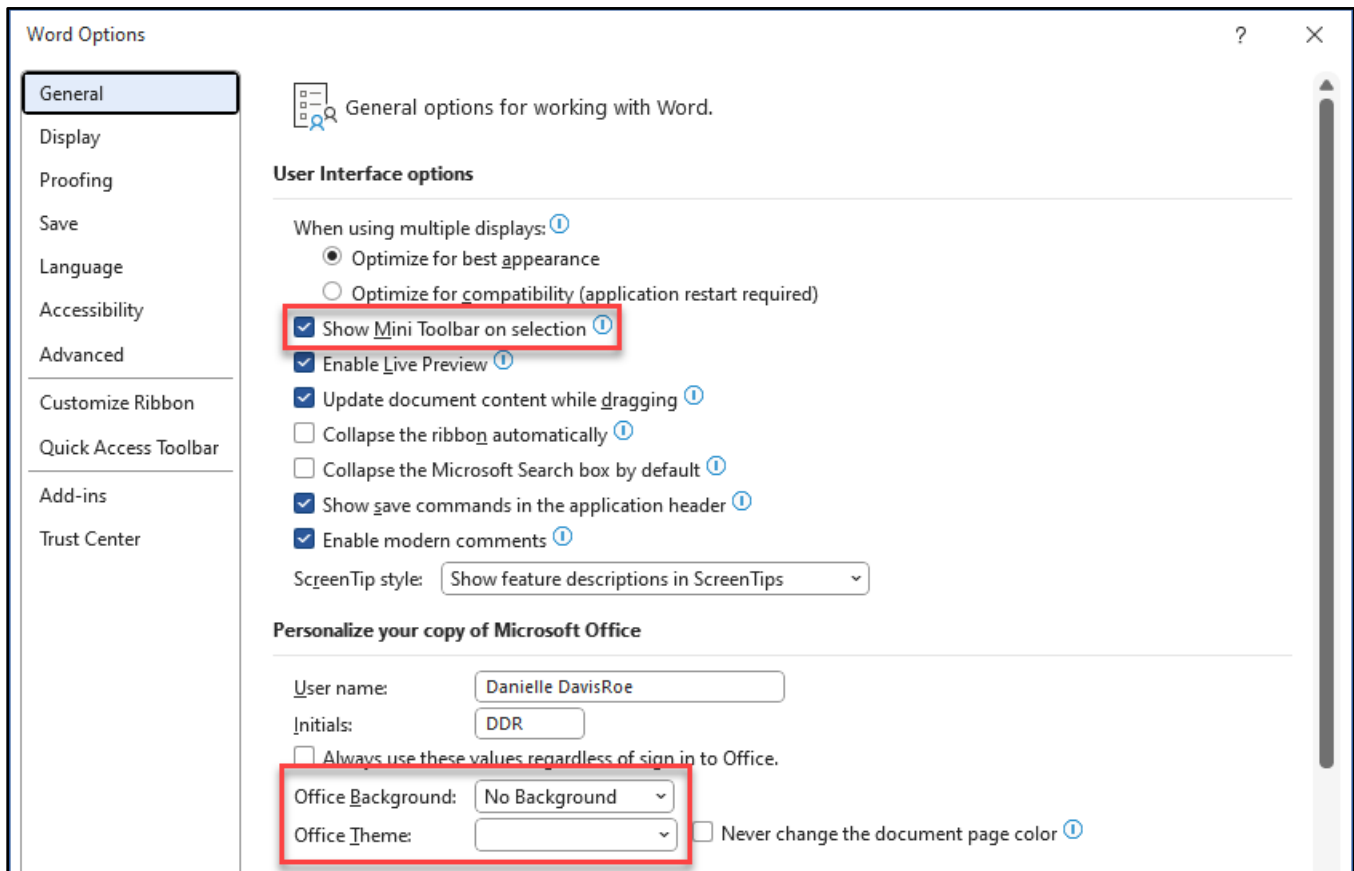


FIGURE 10-1

- **Show Mini Toolbar on selection:** This controls whether the mini toolbar appears when selecting text. Uncheck this box to prevent the mini toolbar from popping up and covering part of the document.

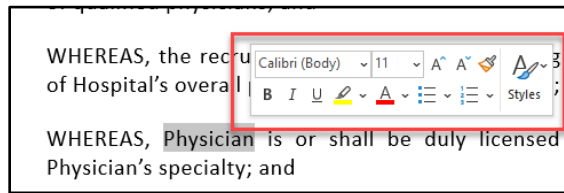


FIGURE 10-2

- Make sure your name and initials are in the **Username** and **Initials** boxes. Check **Always use these values regardless of sign in to Office** to use the values entered despite how your Office account may be setup.
- **Office Background:** the background a graphic that appears at the top, right-hand corner of the Word screen. Most users select **No Background**.

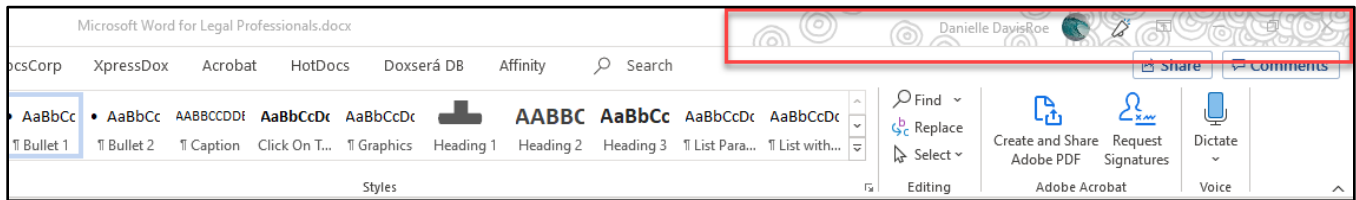


FIGURE 10-3

- **Office Theme: White, Dark Gray, and Black** change the bulk of the screen to the corresponding color. **Colorful** changes the bar across the top to the color associated with that program (blue for Word and Outlook, green for Excel, etc.).

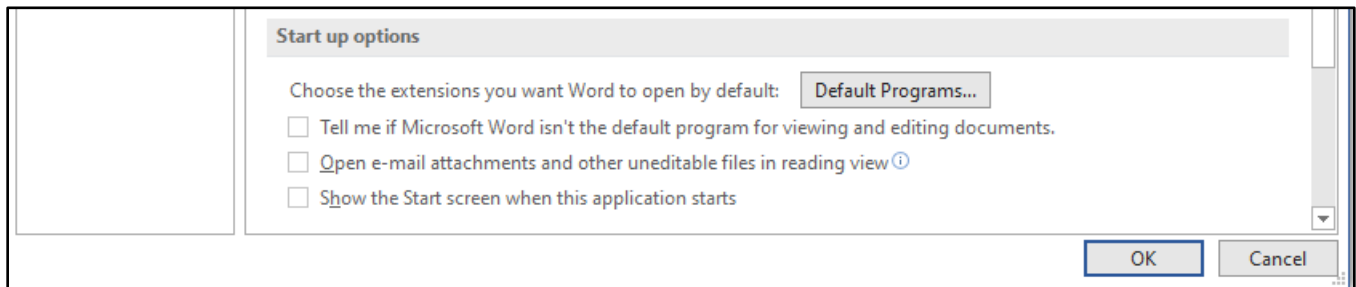


FIGURE 10-4

- **Tell me if Word isn't default program for viewing and editing documents:** When checked, if another program is set as your default program for editing documents, Word will alert you when opening Word. If you'd prefer not to receive such an alert, uncheck this box.
- **Open e-mail attachments in Reading View:** When checked, Word documents attached to emails will open in Reading View. If you do not like the reading view, uncheck this box.
- **Show the Start screen when this application starts:** If checked, this is the reason you see the templates and previously used document list when you launch Word. If you'd prefer to go directly to a new blank document when you launch Word (which is how previous versions worked), then uncheck this box.



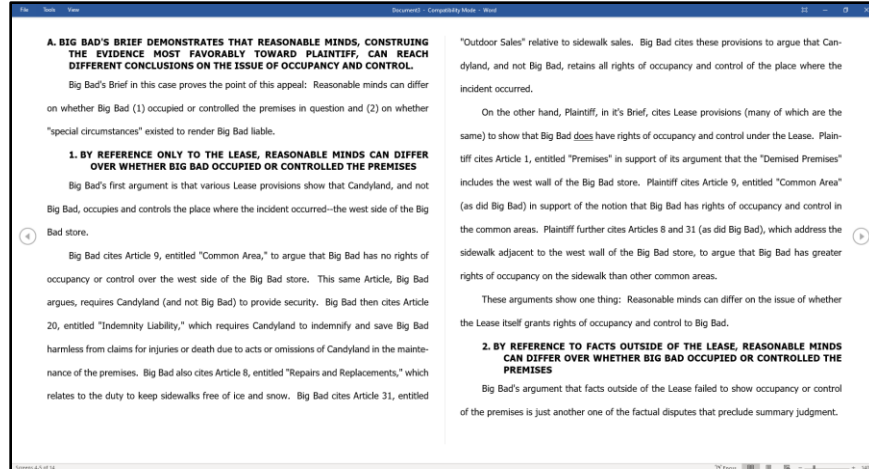


FIGURE 10-5

## Options → Display

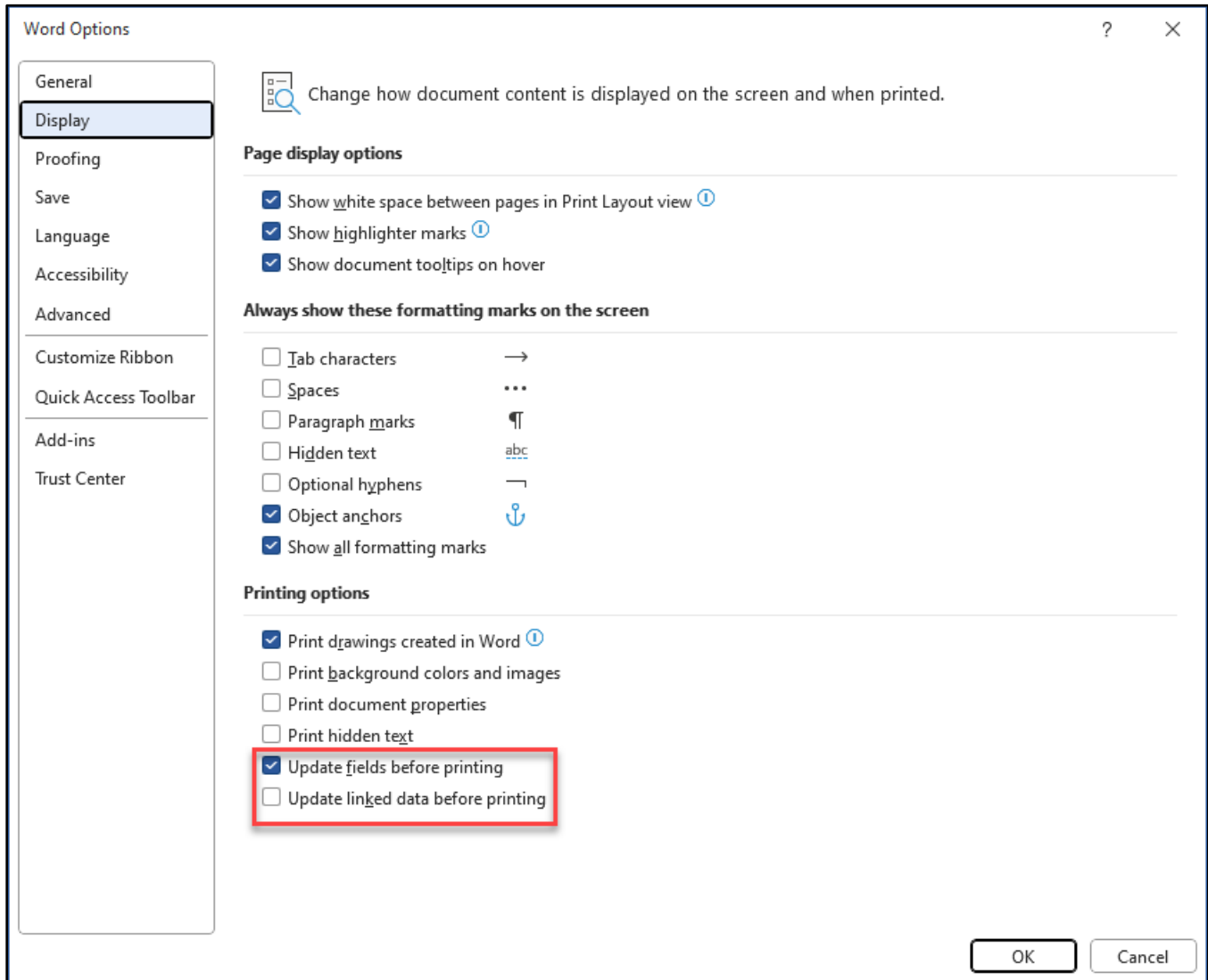


FIGURE 10-6

- **Update fields before printing:** Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.
- **Update linked data before printing:** This will make sure that all linked files are updated before printing.

## Options → Proofing

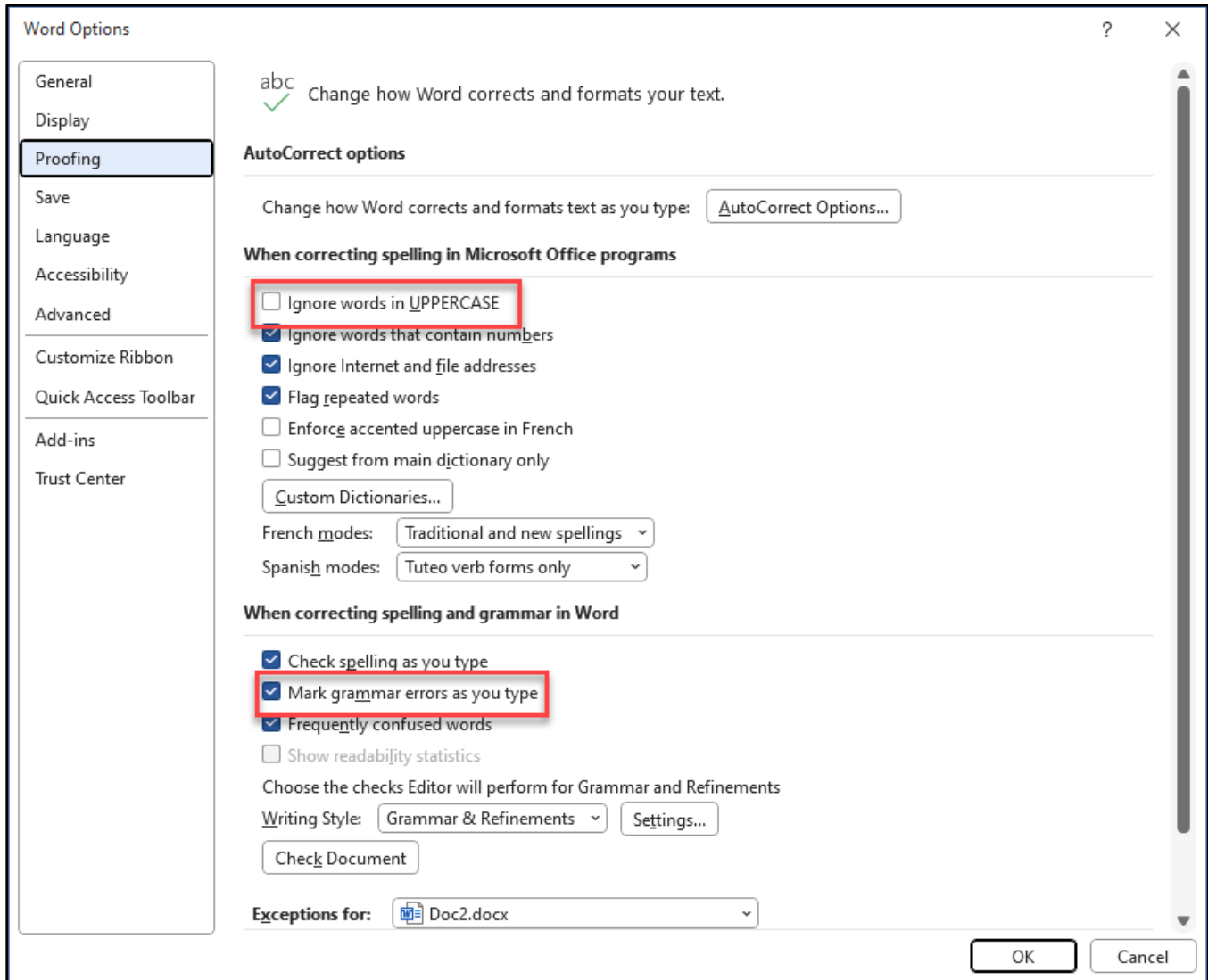
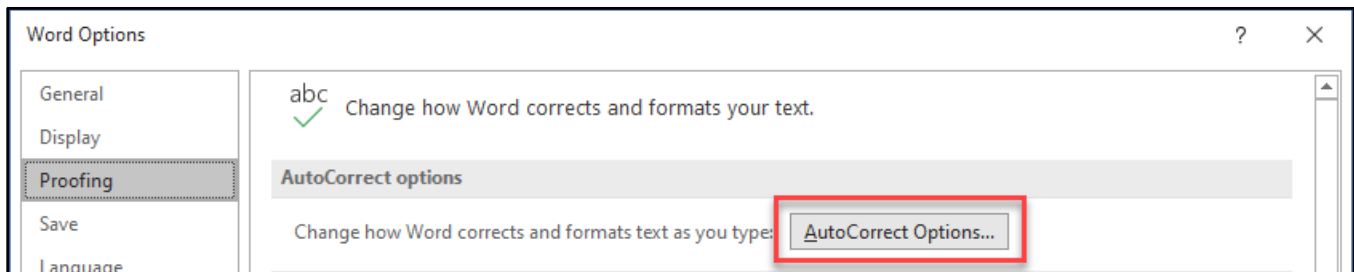


FIGURE 10-7

- **Ignore words in UPPERCASE. Uncheck this box.** Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.
- **Mark grammar errors as you type.** When checked, Word checks your grammar as you type and notes any perceived grammatical errors with green squiggly lines. Uncheck this box to eliminate the green squiggly lines in the document.
- **Check grammar and refinements in the Editor Pane.** If you find Word's grammar checker to be annoying, or you are using another grammar add-in such as grammarly.com, you may want to uncheck this box as well.

## Options → Proofing and Autocorrect

Under **Proofing**, click on the **Autocorrect Options** button.



### AutoCorrect

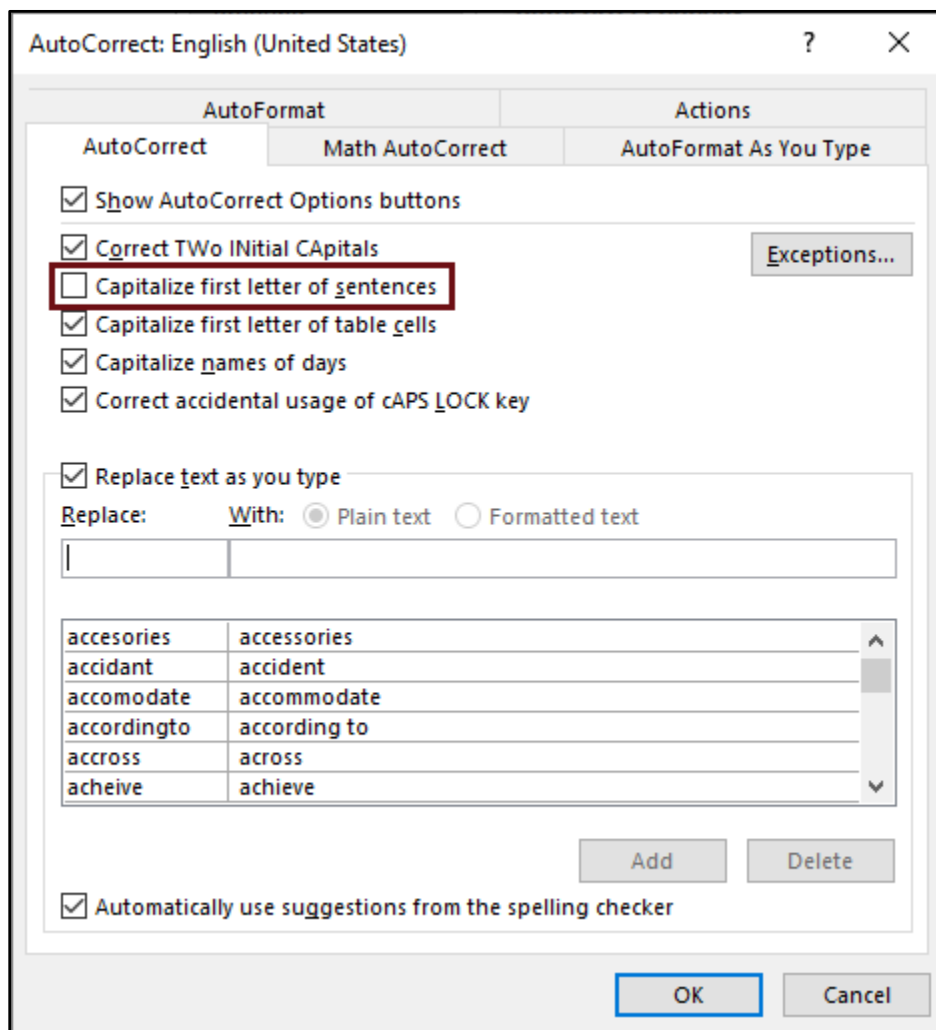


FIGURE 10-8

- Capitalize first letter of sentences:** When checked, Word automatically capitalizes the first word of each sentence and paragraph. For example, when typing "cc:" on a new line, Word will correct it to "Cc:." If you would prefer for Word to stop correcting the first letter, uncheck this box.

- **Capitalize first letter of table cells:** Likewise, when checked, Word automatically capitalizes the first letter of the first word in a table cell. If you would prefer for Word to stop doing so, uncheck this box.
- **AutoCorrect Entries:** You probably also want to delete the AutoCorrect entries in the list at the bottom of the dialog which replace (c) with © and (r) with ®.

## AutoFormat As You Type

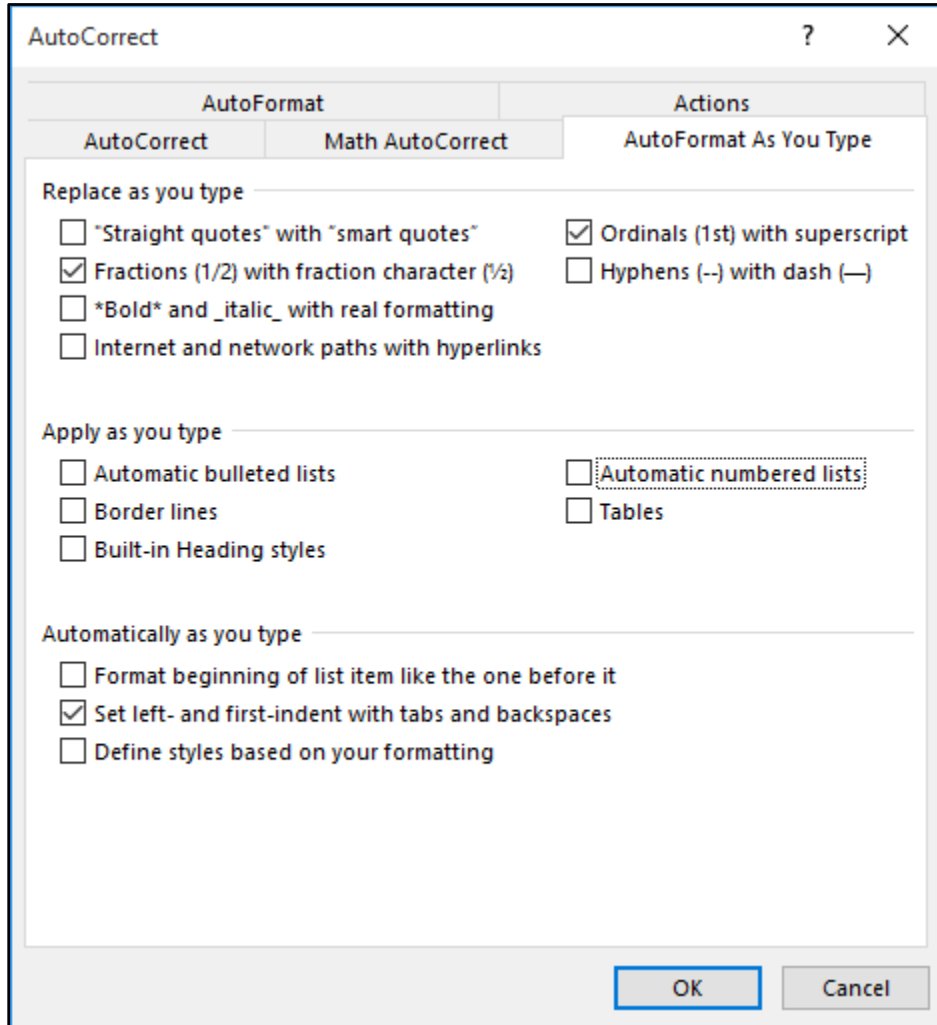


FIGURE 10-9

Uncheck everything except **Ordinals**, **Fractions** and **Set left and first indent with tabs and backspaces**. Optional items include checking **Internet and network paths with hyperlinks** will create clickable hyperlinks to internet addresses, so that a person opening the document can click on the link and go to the web address right from the document. You might also check the **Straight quotes with smart quotes** but keep in mind that this may result in your quotation marks getting converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

Be sure to uncheck everything else of this page!! The **Apply as you type section** causes Word to guess what is being typed and start inserting bulleted lists and tables on its own without any

prompting to do so. Also be sure to uncheck **Define styles based on your formatting**. This option causes Word to create styles on its own.

Finally, click on the **AutoFormat tab**.

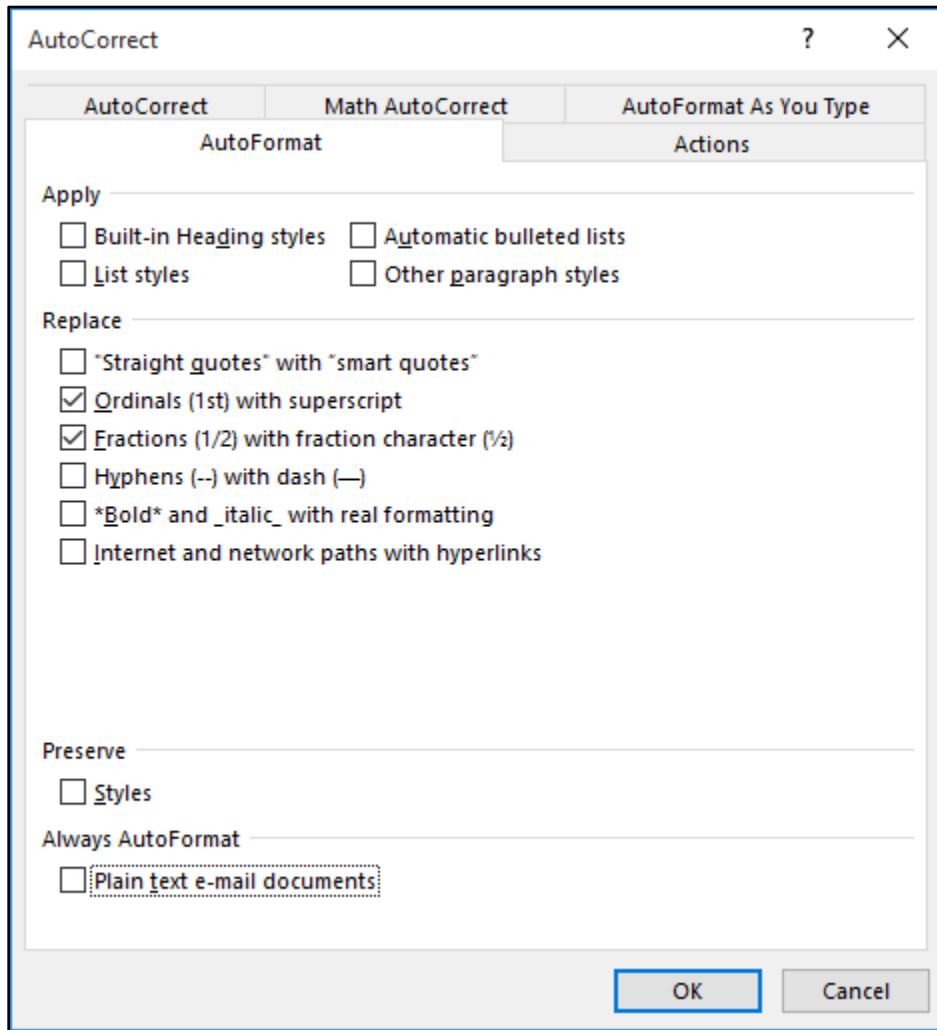


FIGURE 10-10

Make these options match the **AutoFormat As You Type options**.

At this point, make sure to click the **OK** button or all of the changes will be lost.

## Options → Save

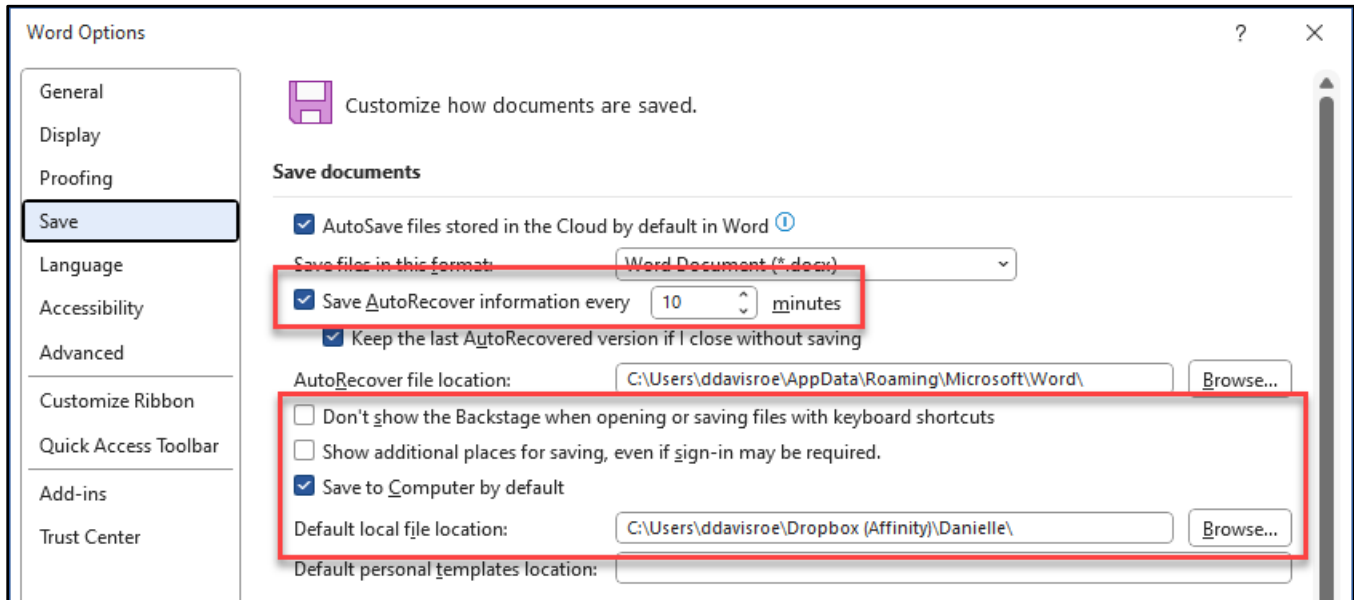


FIGURE 10-11

- **Save AutoRecover information:** Reduce this to **5 minutes** rather than 10 minutes. More frequency is a good thing.
- **Don't show the Backstage when opening or saving files with keyboard shortcuts:** If you want Word to go directly to the open or save browse screens when you open or save a file using keyboard shortcuts (Ctrl + O and Ctrl + N), then check this box. There is no longer a setting to go directly to the open or save browse screens when clicking on the File menu.
- **Show additional places for saving, even if sign-in may be required:** If you don't use OneDrive for storing documents, you can uncheck this box to save space on your screen.
- **Save to Computer by default:** If you don't want to save to OneDrive by default, check this box.

## Options ➔ Advanced ➔ Editing Options

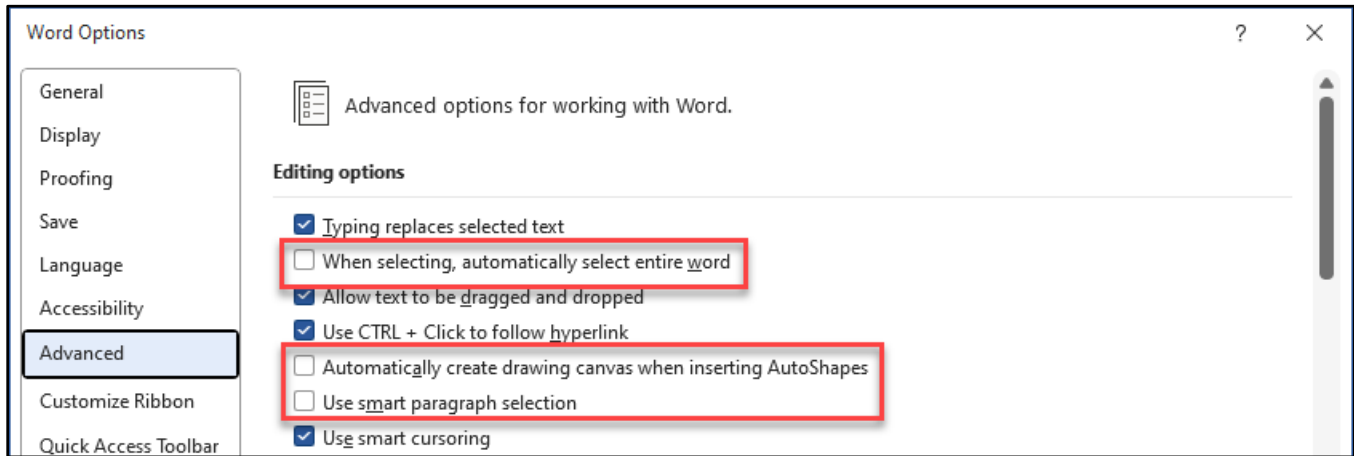


FIGURE 10-12

- Uncheck **When selecting, automatically select entire word**. Regain control over your mouse.
- Uncheck **Automatically create drawing canvas when inserting AutoShapes**.
- Uncheck **Use smart paragraph selection**. If checked, Word will automatically select the paragraph mark at the end of a paragraph you select and you may not always want to do that. If you don't select the paragraph mark and copy text, it will not bring the paragraph formatting with it when you paste.

Some other items to watch out for are:

- Make sure **Typing replaces selected text** is checked. If not, you will not be able to overwrite on top of a selected word.
- **Use smart cursoring** moves the cursor when you scroll up or down through the document, this may or may not be what you want.
- **Enable click and type**, in print layout, this will move your cursor anywhere you double-click in an open area.

## Options ➔ Advanced ➔ Cut, Copy and Paste

Note that in this area you can control the default paste action in a variety of circumstances. When copying from other programs (such as a browser), we recommend that you strip all formatting off of the source text. By changing the setting shown below, this will always be the case. You may want to change some of the other settings as well depending upon how you work.



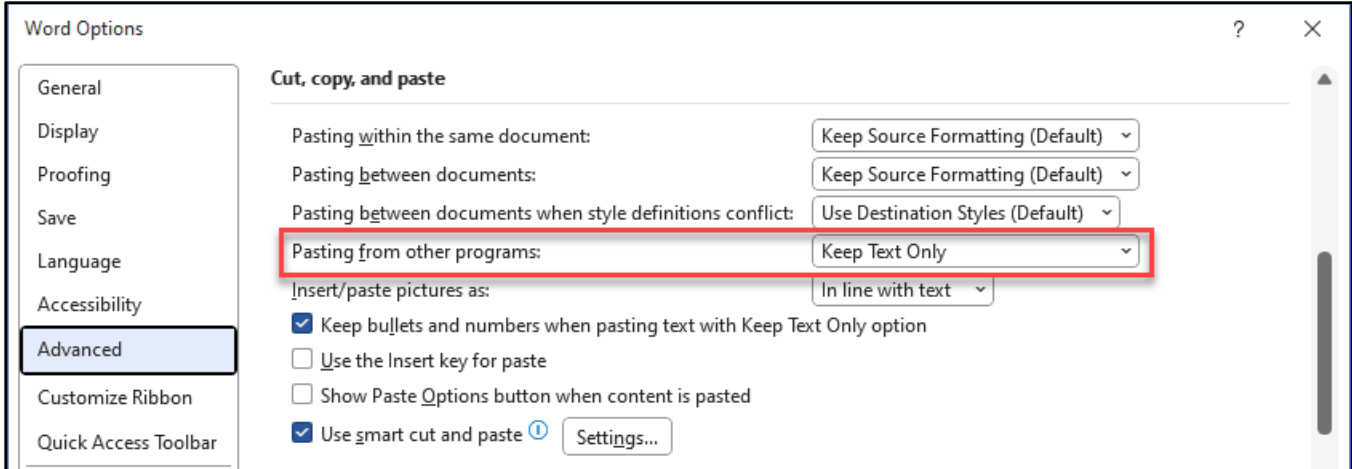


FIGURE 10-13

## Options → Advanced → Show Document Content

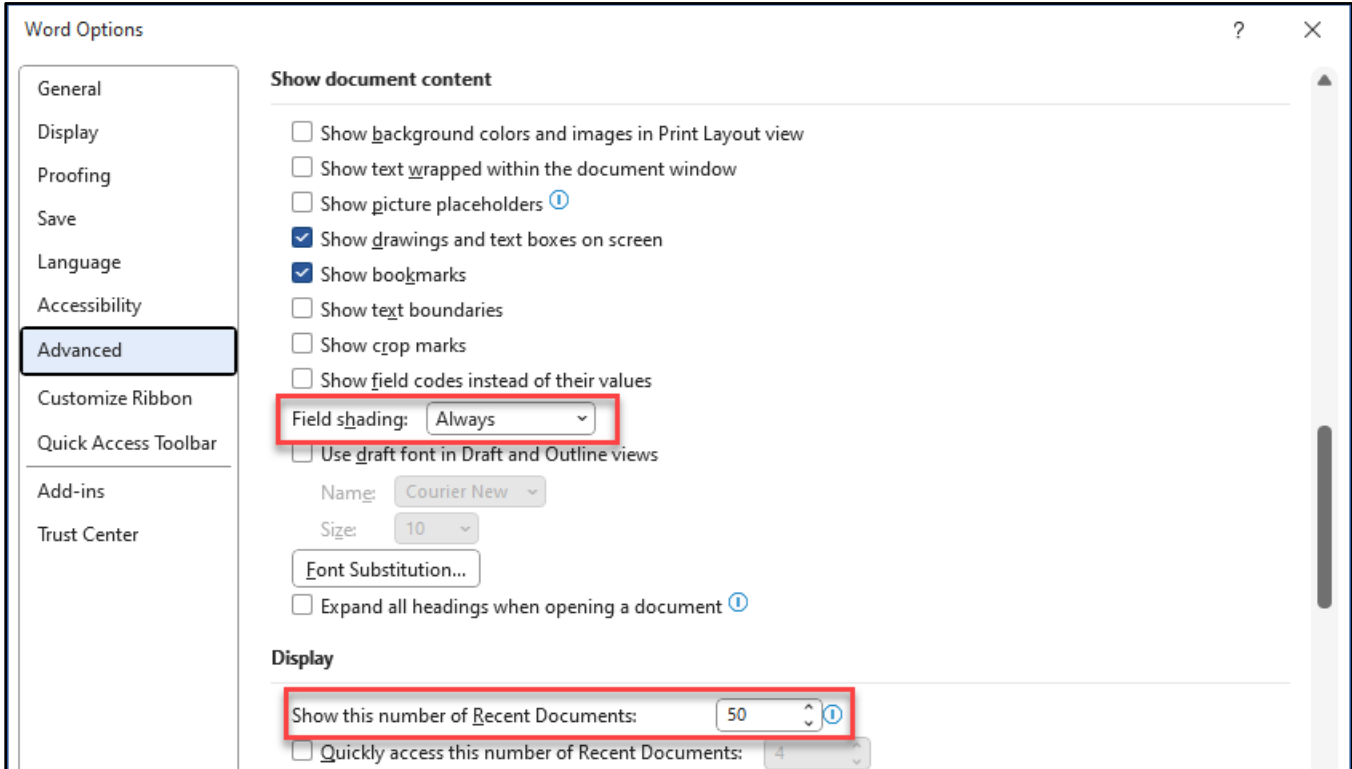


FIGURE 10-14

- Change **Field shading** to **Always**.
- Change **Show this number of Recent Documents** to your preference.

## Options ➔ Advanced ➔ Fidelity & General

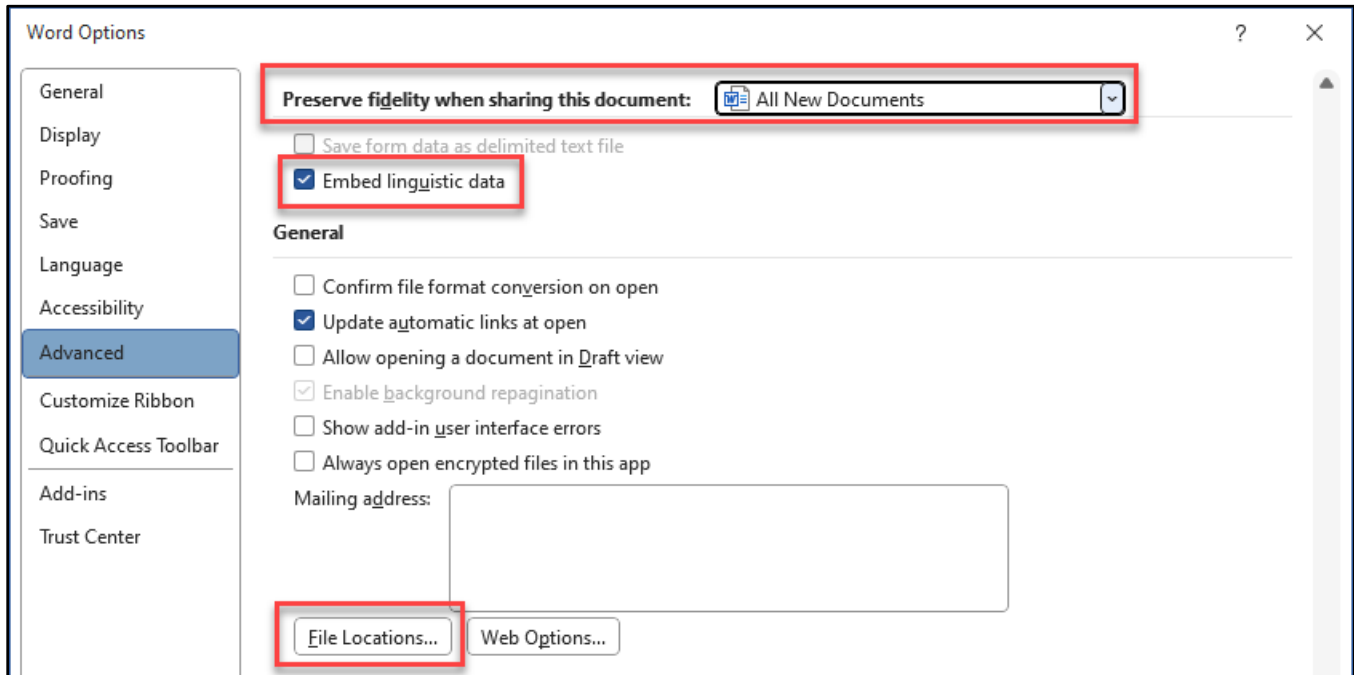


FIGURE 10-15

- Change the heading in **Preserve fidelity when sharing this document** to **All New Documents** (so the setting change applies to all future documents) and clear the **Embed linguistic data** box. "Linguistic data" refers to things like speech (from text-to-speech or speech-to-text applications or add-ins) and handwriting. Embedding them makes the file-sizes bigger.
- Click **File Locations** and make sure that Word is defaulted to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.

## Options → Advanced → Layout Options

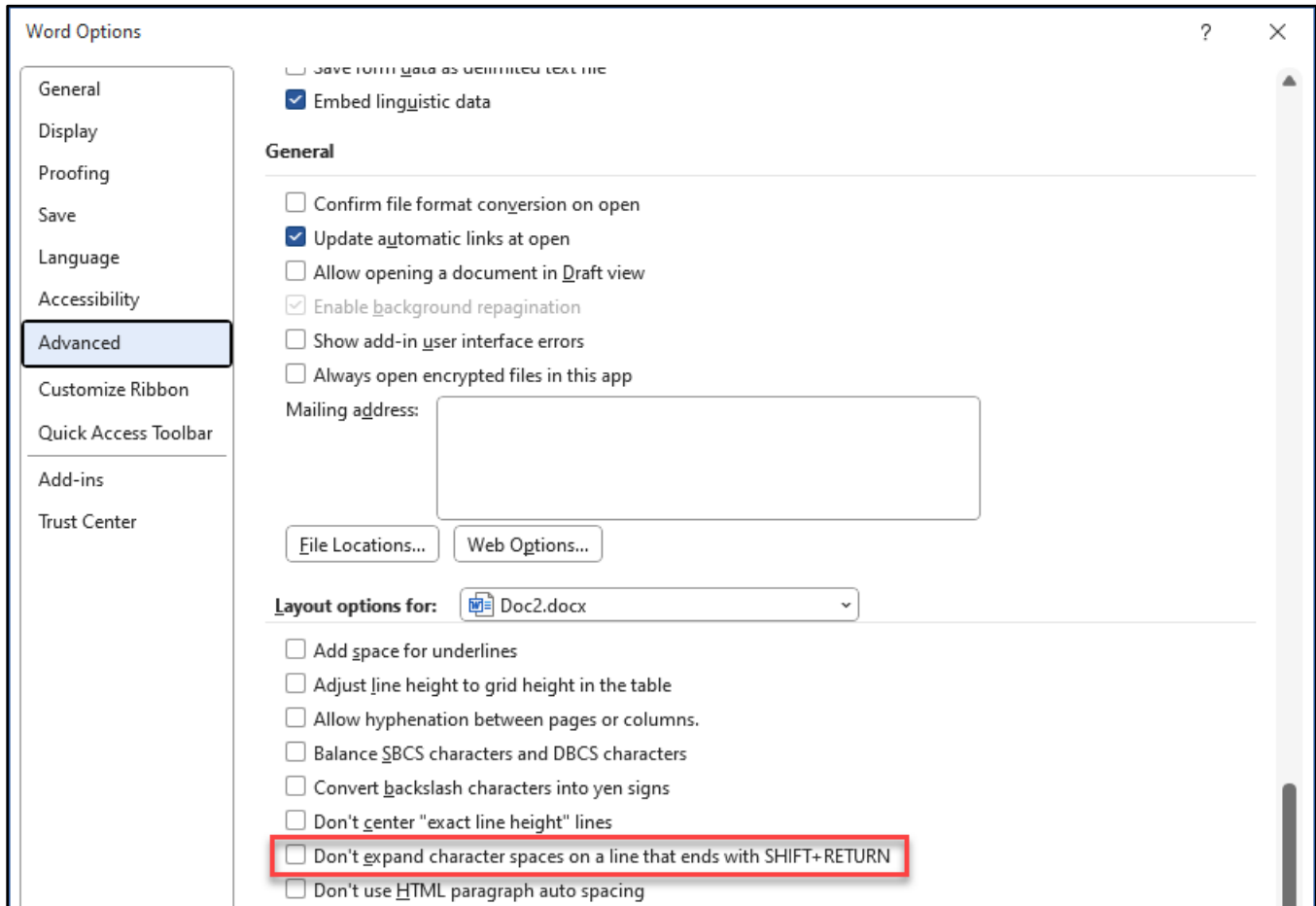
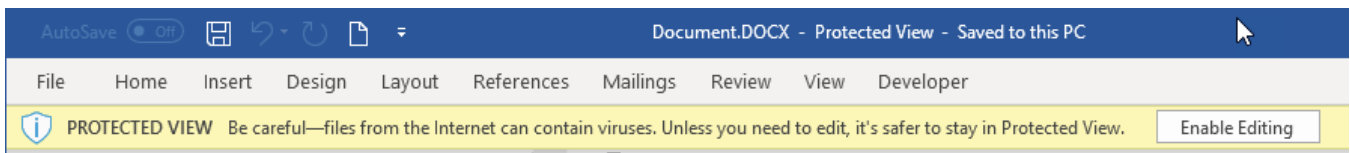


FIGURE 10-16

Check **Don't expand character spaces on a line that ends with SHIFT-RETURN** because this is the number one reason that a few words will be spread across the entire line with giant gaps between each word. For your information, Shift + Return = "soft return" which tricks Word into thinking that what appears to be two lines of text are actually one line of text.

## Options → Trust Center → Trust Center Settings Button → Protected View

By default, Protected View is enabled. When enabled, Word displays a warning if the Word document was created on a different system. While the warning is displayed, the file may only be viewed, not edited. To edit the document, you must click the **Enable Editing button**.



Protected View disables all of the active content in the document and reduces the risk of infection from a worm, virus, or other malware that could be embedded in an unknown document.

If protected view bothers you, you may disable it. There is risk involved in disabling it. **You should check with your system administrator prior to unchecking these boxes.** To change these settings, go to **Protected View** and uncheck one or all of the boxes. See Figure 10-17.

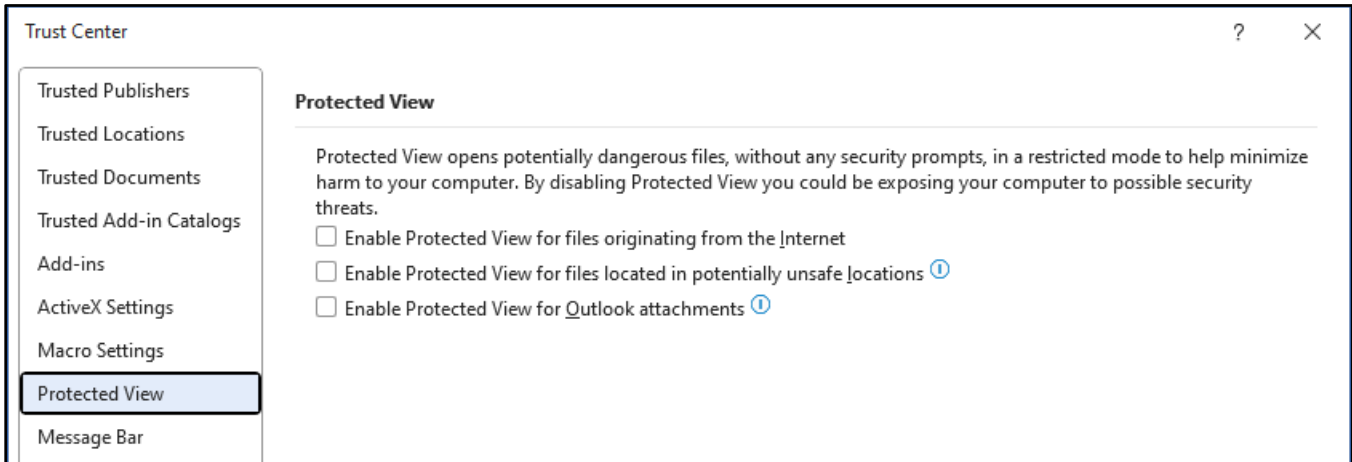


FIGURE 10-17

These boxes enable protected view, unchecking them disables the protection.

- **Enable Protected View for files originating from the Internet.** This should probably remain checked. If you download a Word document from a web page, or anywhere else from the internet, you will probably want the Protected View protection.
- **Enable Protected View for files located in potentially unsafe locations.** This is the main cause of triggering Protected View when opening a file from a network folder. You may disable this, but you may want to make your network server a "Trusted Location" instead. (See Trusted Location, below.) Unchecking this box also disables Protected View from other locations, such as USB thumb drives.
- **Enable Protected View for Outlook attachments.** With this checked, you will receive a protected view warning for every Word document that you open as an attachment from Outlook. Unchecking this box turns off the protection.

**NOTE:** In addition to these settings, Windows may "block" Outlook attachments that you save to your file system. To unblock them, you must right-click the file, select **Properties**, check the **Unblock box** (on some systems this appears as a button instead of a checkbox), and click **OK**:

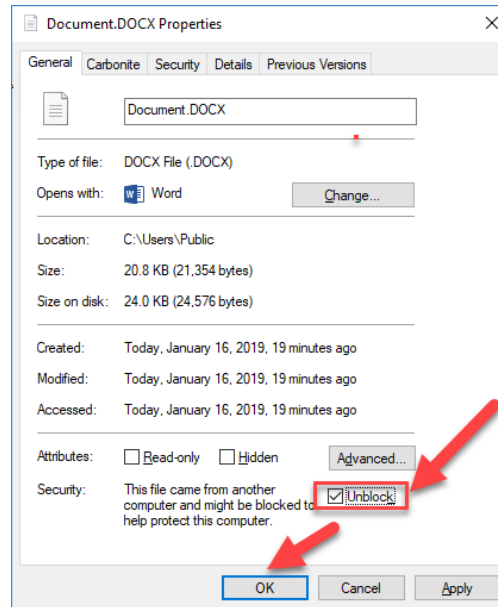


FIGURE 10-18

## Options → Trust Center → Trust Center Settings Button → Trusted Locations

Trusted Locations are for folders on your system or on your network that you trust. Adding a folder or network share as a Trusted Location completely disables all of the Trust Center checks and protections for that location. To add a folder such as "N:\Client Files" as Trusted Location:

1. Go to **File → Options → Trust Center → Trust Center Settings → Trusted Locations**.
2. Check the **Allow Trusted Locations on my network**. You will not be able to enter a network location without checking this box.
3. Click **Add new location**, enter the path of the folder and check **Subfolders of this location are also trusted**. Then click **OK** and **OK**. All documents in that folder will now be trusted, and the Trust Center will no longer check them.

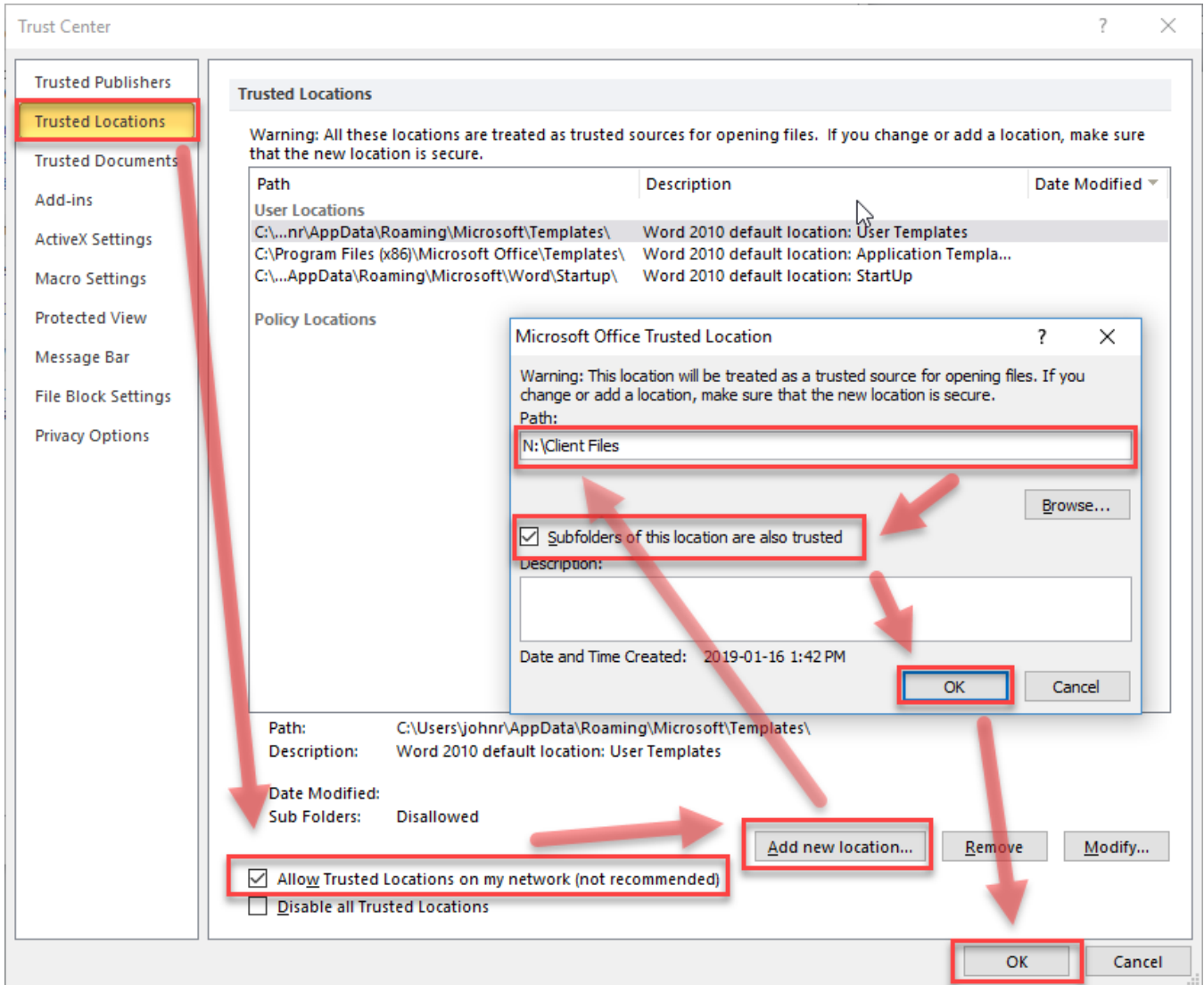


FIGURE 10-19

Options → Trust Center → Trust Center Settings Button  
 → File Block Settings

File Block Settings will trigger Protected View for all files of a particular type regardless of where they are located. Again, there is risk involved in disabling this feature. **Check with your system administrator before unchecking these boxes.** In particular, there have been prior issues with RTF files.

To have all file types open and allow editing without a prompt, under the **File Block Settings**, uncheck all of the check boxes and under **Open behavior for selected filed types**, select **Open selected file types in Protected View and allow editing**. See Figure 10-20.

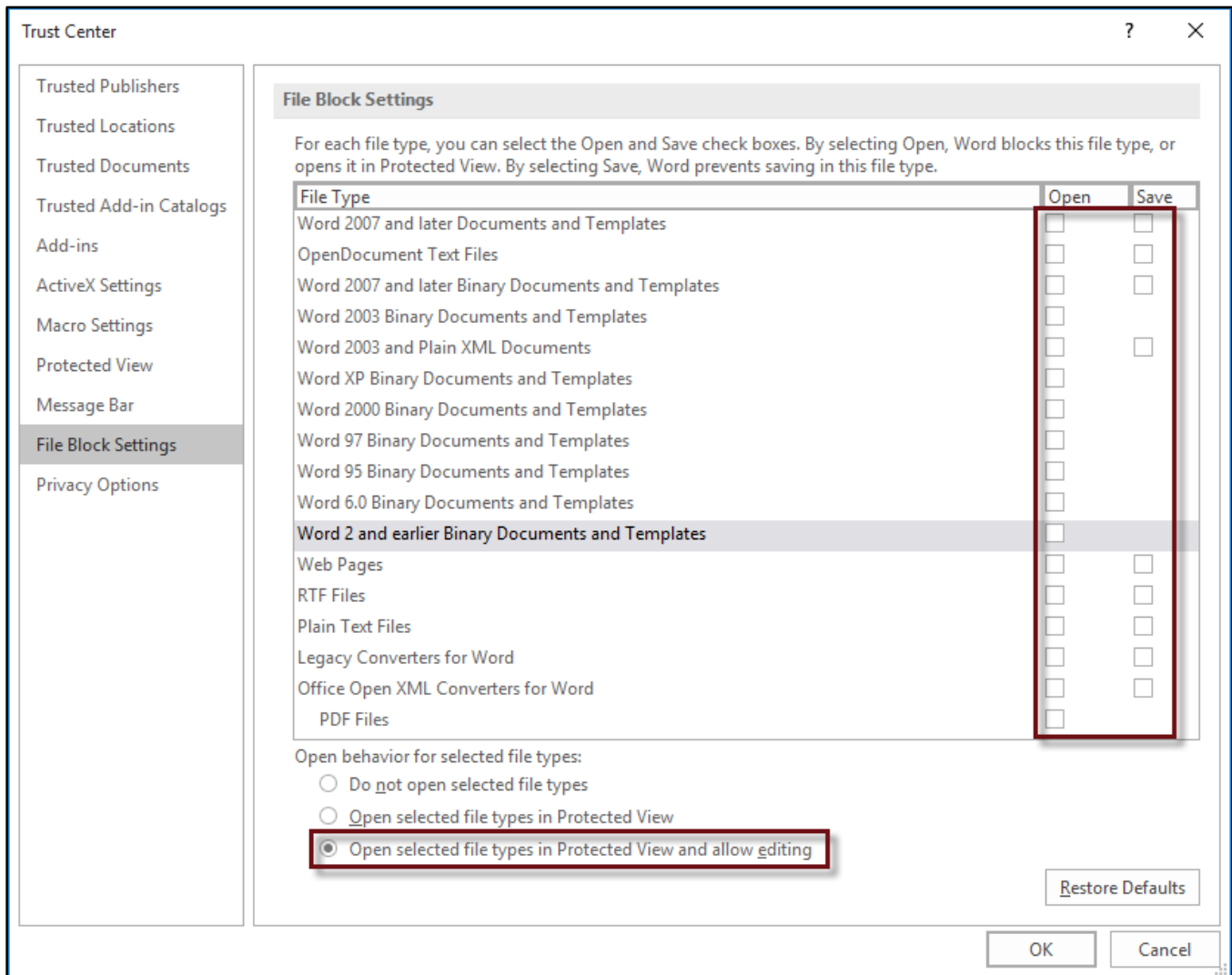


FIGURE 10-20

## Options → Trust Center → Trust Center Settings Button → Privacy Options

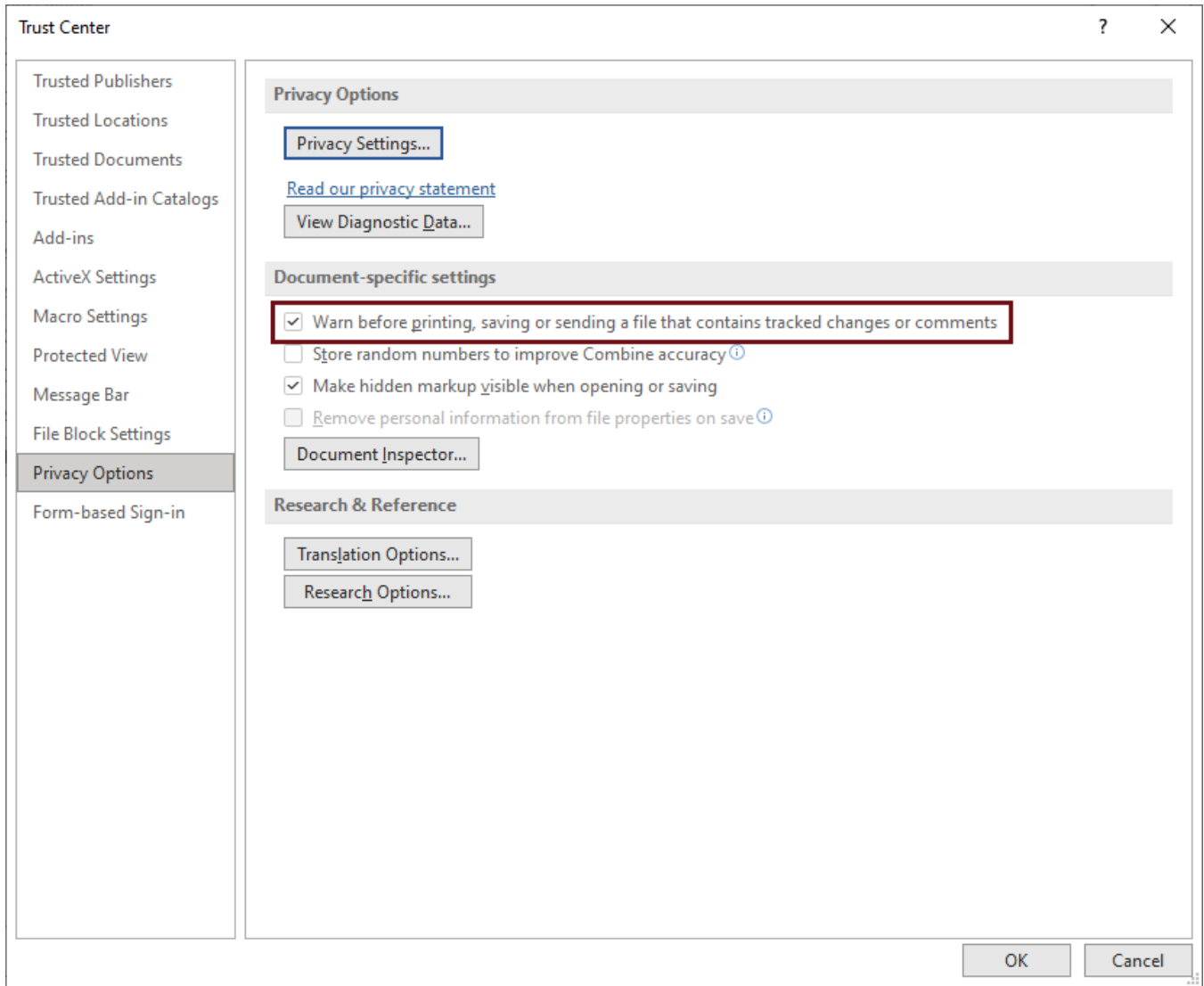


FIGURE 10-21

Go to the **Trust Center** and click the **Trust Center Settings** button. A new dialog will open. Click on **Privacy Options** and check **Warn before printing, saving or sending a file that contains tracked changes or comments**. Also clear the **Send personal information to Microsoft to make improvements to Office**.

### Lock In Your Setting Changes

Make sure that after you're done with all of the foregoing changes that you click the **OK** button, **NOT Cancel** and **NOT the X button** in the top, right-hand corner of the dialog. That makes the changes stick. It's a good idea after you do this to exit Word, re-launch Word and spot check a couple of the settings to ensure that they're still modified. If the changes don't stick, there are a couple of reasons that could happen, and we can help you figure out why. Just send us an email - [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).



## Fix Track Changes Settings

There are a few changes you'll want to make to the Track Changes defaults. All of these changes begin on the **Review ribbon**.

### Change the Markup

By default, Word shows you **Simple Markup** which means that if you delete text, it disappears and a little red, vertical line appears in the left margin adjacent to the line where something was deleted. Of course, I not only want to know that something was deleted, but *what* was deleted. Therefore, switch from **Simple Markup** to **All Markup** (see below).

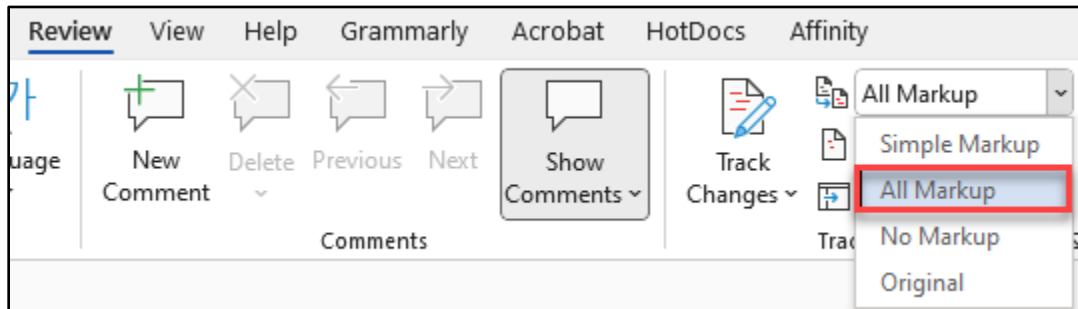


FIGURE 10-22

## Track Changes Options

In order to get to this dialog, click **Review ribbon | Tracking launcher**.

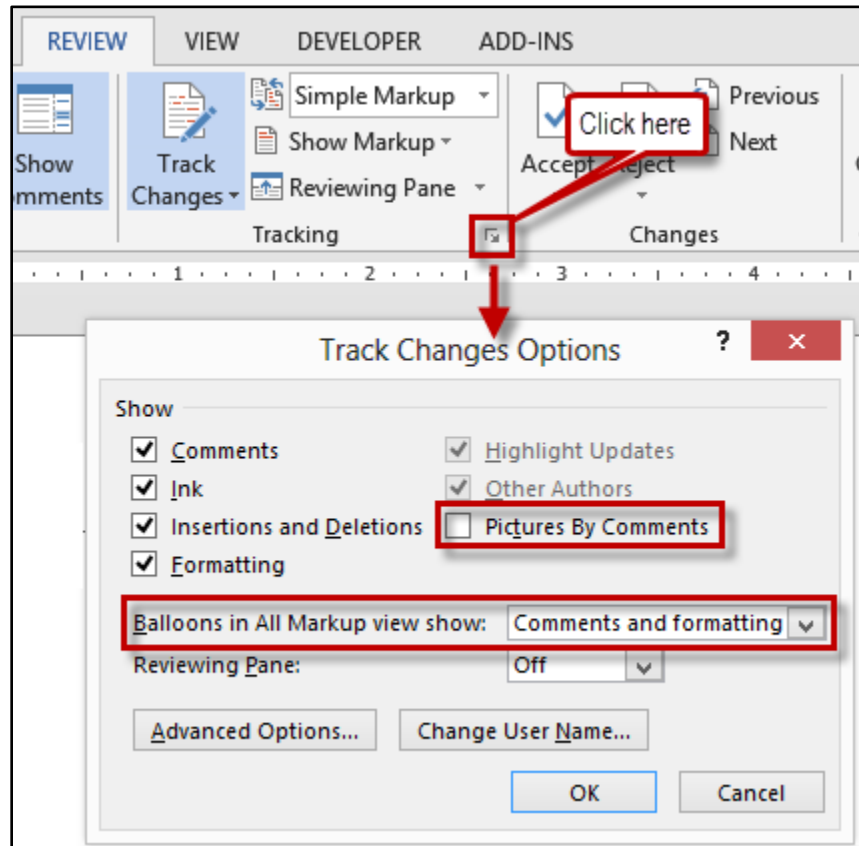


FIGURE 10-23

- Clear **Pictures By Comments** (unnecessary and clutters up the comment screen).
- **Balloons are best used for Comments and Formatting only**: not Revisions which is the default setting.

# CHAPTER 11

## CUSTOMIZING WORD

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

### Quick Access Toolbar

The Quick Access Toolbar is a customizable toolbar that is available at the top of the Word screen regardless of which ribbon is showing. Customize it to include buttons that frequently use to minimize how often you need to switch between ribbons and for easy access to frequently used features that aren't available on a ribbon.

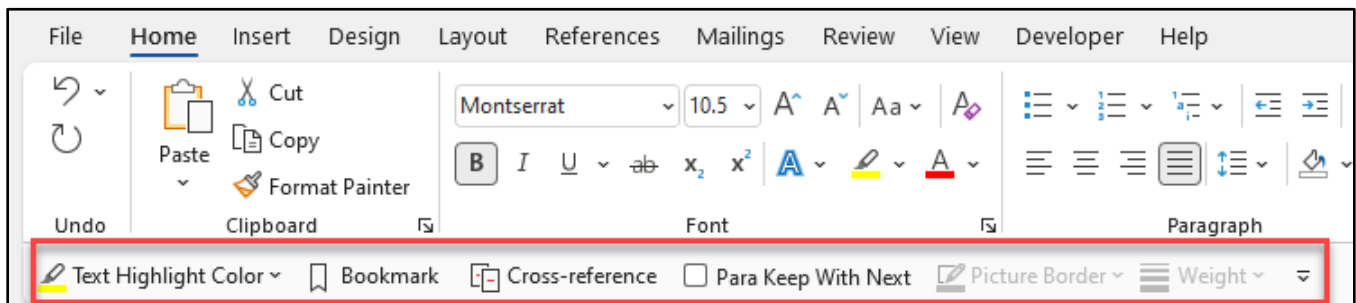


FIGURE 11-1

### Showing the Quick Access Toolbar (365/2021)

In 365/2021, the Quick Access Toolbar ("QAT") is hidden by default. To show the QAT, right-click anywhere in the ribbon and select **Show Quick Access Toolbar** to show the QAT.

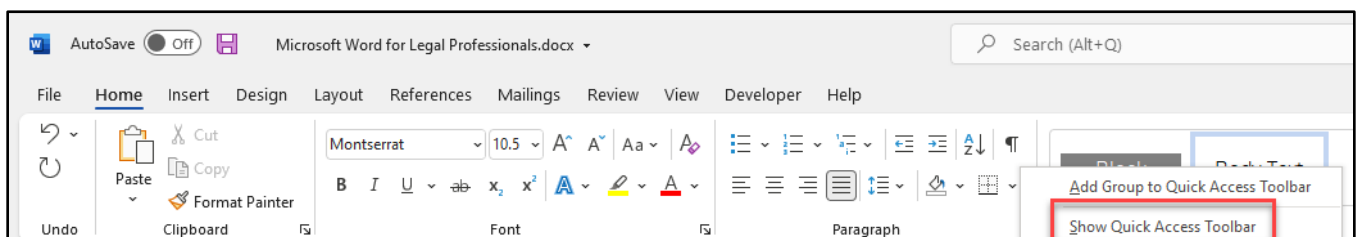


FIGURE 11-2

The QAT will appear above the tabs, in the upper left-hand corner, next to the save button.

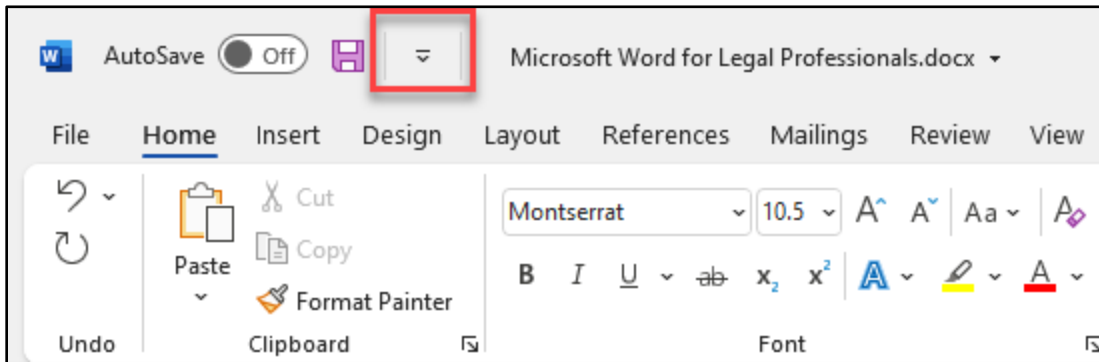


FIGURE 11-3

## Adding Commands

In 2013/16/19, there will be a few commands, such as a save, undo, and redo, on the QAT by default. In 365/2021, there are no commands on the QAT unless you add them.

You can add commands from the ribbon or through Word's options.

### Right Click

To add a command from a ribbon, right-click on it and select **Add to Quick Access Toolbar**.

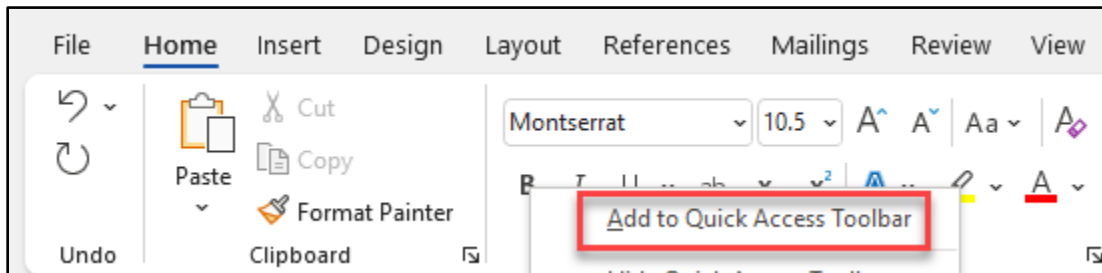



FIGURE 11-4

## Word Options

For commands not on the ribbon, you'll need to go through your Word Options.

1. Click on the  icon on the right edge of the QAT and select **More Commands...**

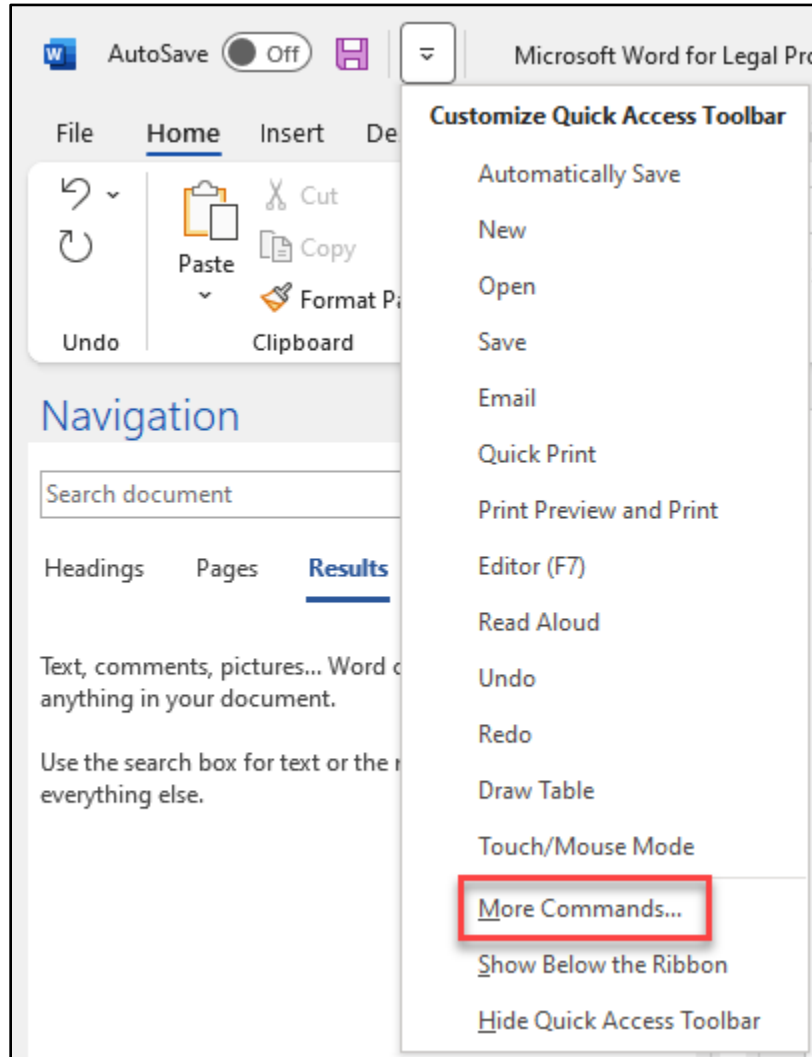


FIGURE 11-5

2. Under **Choose commands from**, select **Commands Not in the Ribbon**.

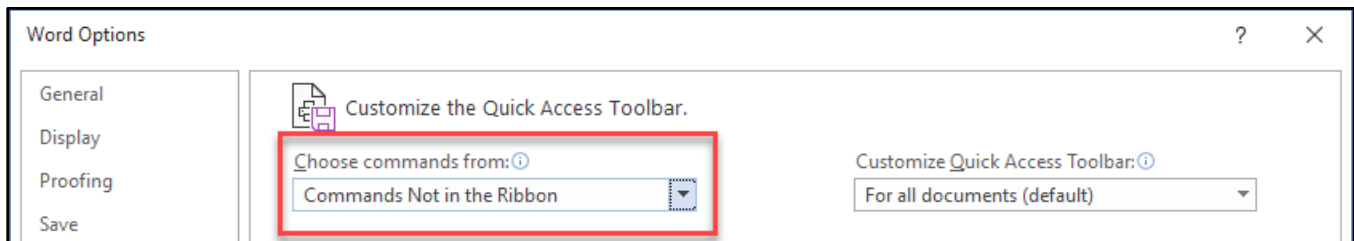


FIGURE 11-6

3. Select the command to add and click on the **Add >>** button.

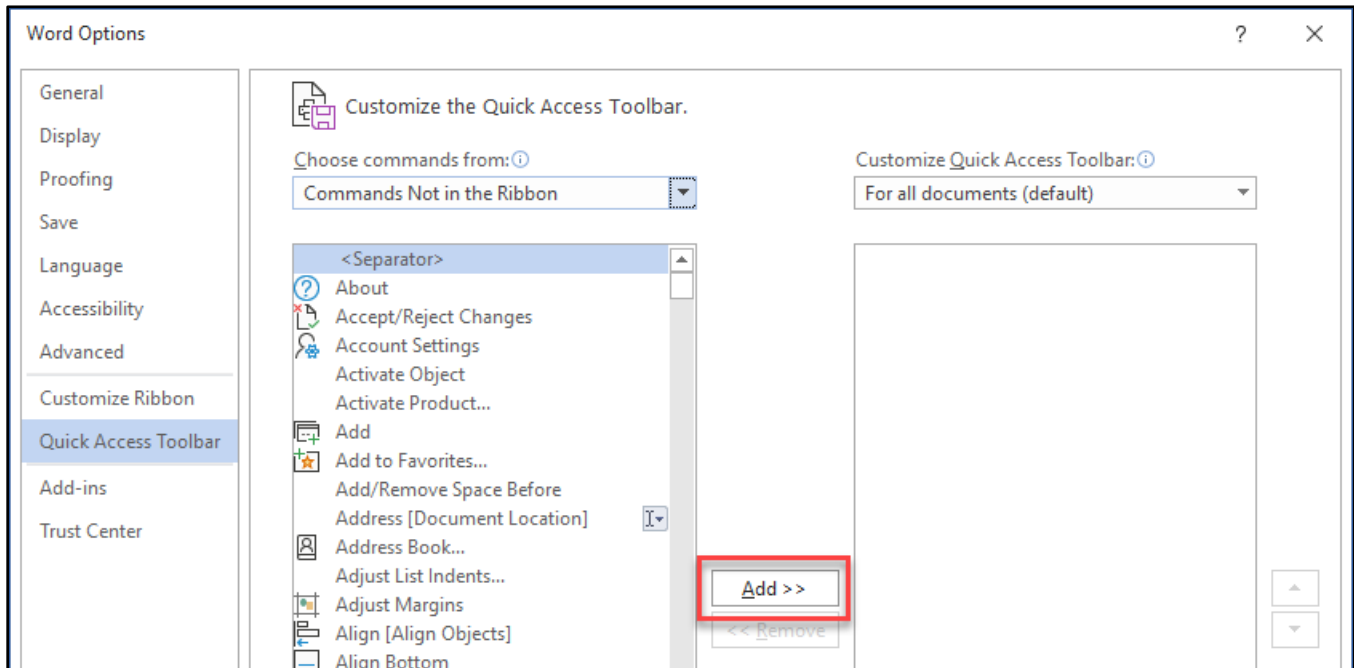



FIGURE 11-7

## Organizing the QAT Ordering the Commands

To reorganize the commands found in the QAT:

1. Click on the  icon on the right edge of the QAT and select **More Commands...**
2. Under **Customize the Quick Access Toolbar**, select the command to be moved and used the **up and down arrows** to move it.

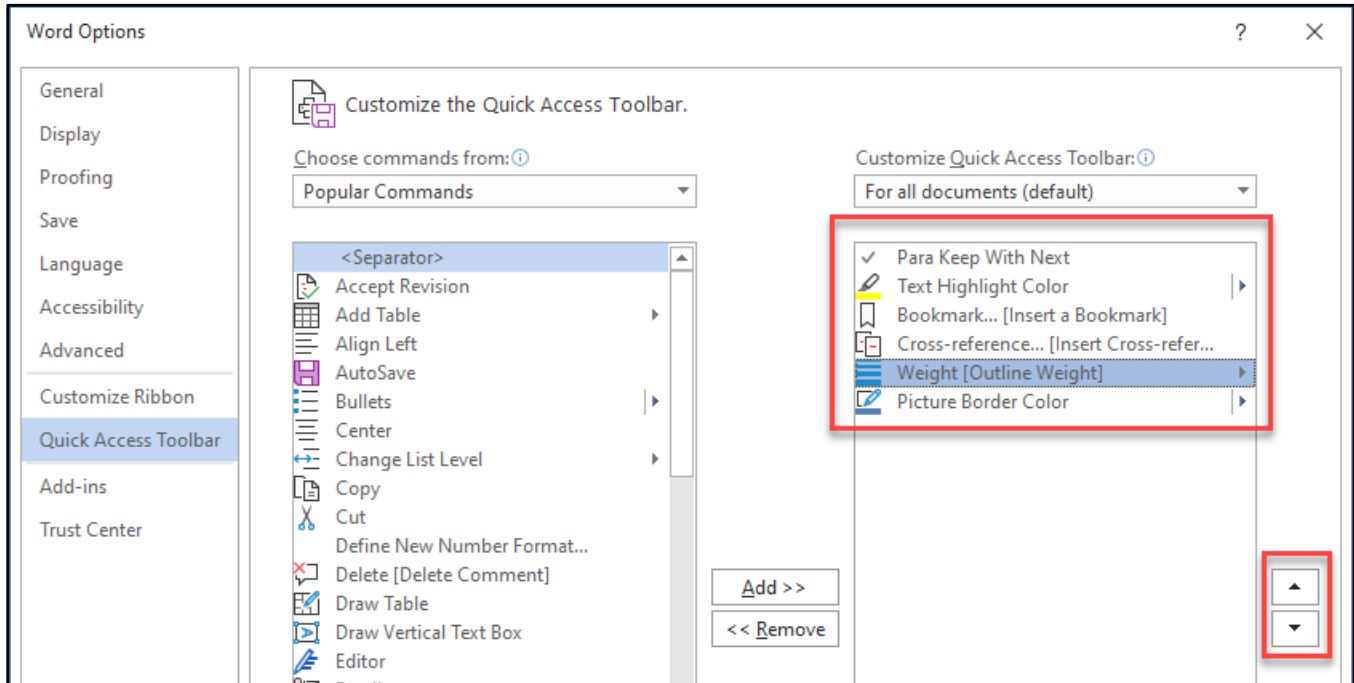


FIGURE 11-8

## Separators

You can add separators to group commands in the QAT:

1. Click on the  icon on the right edge of the QAT and select **More Commands...**
2. At the top of the **Choose commands from list**, select **<Separator>**.

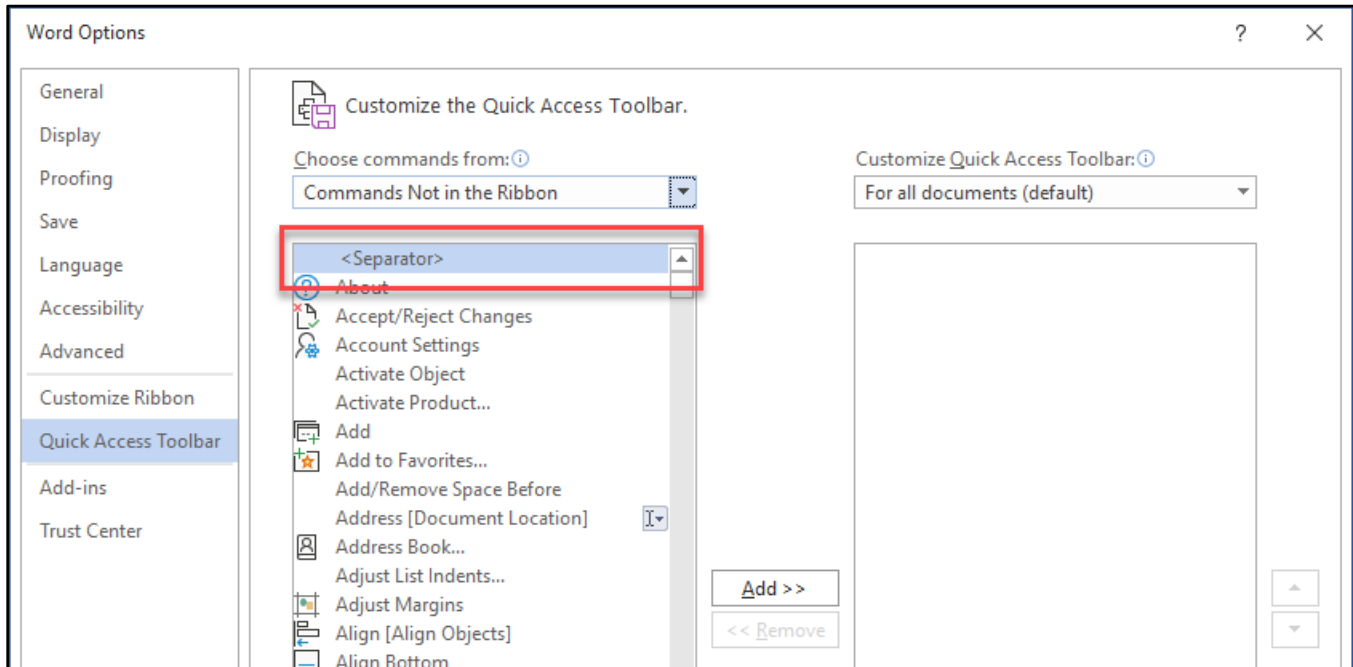


FIGURE 11-9

3. Use the **Add>>** button to add it to the QAT and the **up and down arrows** to move it into the desired position.

## Showing Below the Ribbon

The QAT is shown above the ribbon by default. Depending on your version of Word and display settings, the commands on the QAT may not include the button's typical colors. You may also have limited space available due to the file name and search bar.

These frustrations can be alleviated by moving the QAT below the ribbon. Click on the  icon on the right edge of the QAT and select **Show Below the Ribbon**.

## Showing Command Labels (365/2021)

In 365/2021, you can choose whether to show labels for the buttons you add to the QAT. Click on the drop-down arrow on the right side of the QAT and select **Show/Hide Command Labels** to toggle them on and off.

## Suggested Additions to QAT

Consider adding the following commands to the QAT:

- AutoText
- Back: Allows you to jump back to where you were in a document when you clicked a hyperlink.



- Calculate: Select any list of numbers or any equation, click this button and it will tell you the result in the status bar at the bottom of the Word window.
- Close File
- Edit Footer
- Edit Header
- Editor - Spell Check
- E-mail: Emails the current document as an attachment in one click.
- Envelopes...: This opens the envelopes and labels wizard.
- Inspect document: This removes metadata from your document.
- Organizer: This allows you to easily copy styles from the default template into the document you're working on.
- Page Setup
- Para Keep Lines Together: holds the lines of a particular paragraph on the same page
- Para Keep With Next: glues paragraphs together so they cannot be separate by a natural page break
- Print: This option brings up the print dialog box
- Quick Print: This option prints the open document to the default printer.
- Save As
- Style Inspector
- Style: Shows you what style is applied to the text your cursor is in.
- Styles...: Opens style window.
- Tabs: opens the tab settings dialog which makes it very easy to add tabs to your document
- Track Changes: Automatically track proposed changes you make to a document.

## Problems With Word's Default Formatting

There two main issues that you'll need to address before you start working with Word:

- Word's default font and paragraph settings are not appropriate for legal documents. The default font is Calibri (a sans serif font many lawyers feel inappropriate for legal instruments), size 11, the line spacing is 1.08 (rather than single) and there is auto-paragraph spacing turned on (8 point after). You probably want a different font, and you certainly don't want 1.08 line spacing and 8 point spacing between paragraphs as your default.
- Word's default style settings are also inappropriate for legal documents. Rather than provide you with styles for a block quote, or outline paragraph numbering, you get the following, utterly useless and inappropriate styles (some of which have blue text):

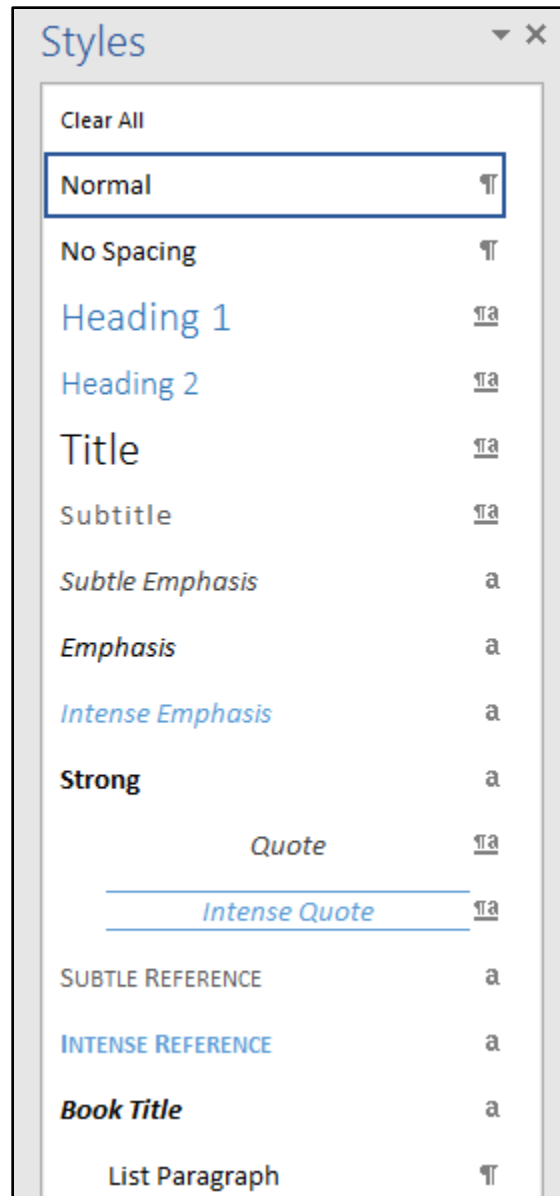


FIGURE 11-10

## Word's Default Template Normal.dotm

A **template** is a special kind of file that provides you a model of a document. Whenever you create a new document in Word, you're *always* using a template, even if you don't know it. You are prompted to select a template whenever you open a new document (unless you fix this default setting by clicking **File menu** → **Options** → **General** (left side) → clear "**Show the Start screen when this application starts**"). To open the "normal.dotm" template, choose the "Blank Document" template. Every template contains default font, paragraph and section formatting and these formatting characteristics are automatically applied to every new document created from the template.

Default document settings are still stored in the Normal template (as they were in previous versions of Word). However, the template is now called "Normal.dotm" as opposed to "Normal.dot". This template is usually located in:

C:\Users\[your logon name]\AppData\Roaming\Microsoft\Templates

## Un-Hide the Templates Folder and Show File Name Extensions

Unfortunately, by default, Windows hides the folder where your templates are stored. Follow these steps to un-hide the folder:

1. Open File Explorer by hitting the Windows key + E.
2. Click the **View Ribbon** → **Options** button → **Change Folder and Search Options**.
3. Click the **View tab** → check **File name extensions** and **Hidden items**.

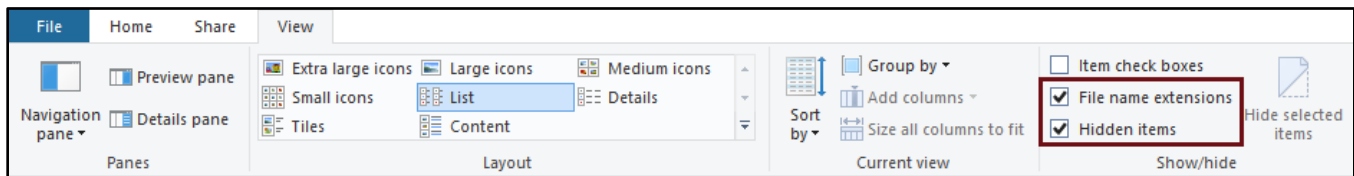


FIGURE 11-11

4. Click the **Apply to Folders** button → click the **Yes** button when it asks you if you want all folders of this type to match this folder's view settings.
5. Click the **OK** button.

## Fixing Default Formatting

Every new document comes with default formatting. The default formatting that comes with Word is rarely the same as legal professionals want. By changing the default formatting, you will save yourself time down the road when you create new documents from scratch. This process will update the default formatting in your Normal template (see Chapter 5).

### Change Your Default Font Formatting

Start by changing your font formatting:

1. Open a blank document in Word.
2. Click **Home ribbon** → **Font launcher**.

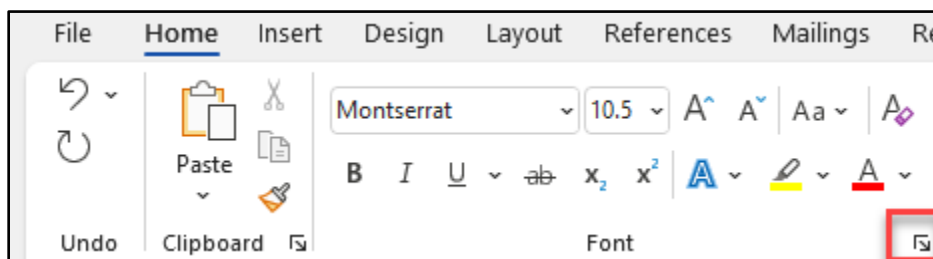


FIGURE 11-12

3. Select your preferred font and font size.
4. Click the **Set as Default** button at the bottom of the dialog.

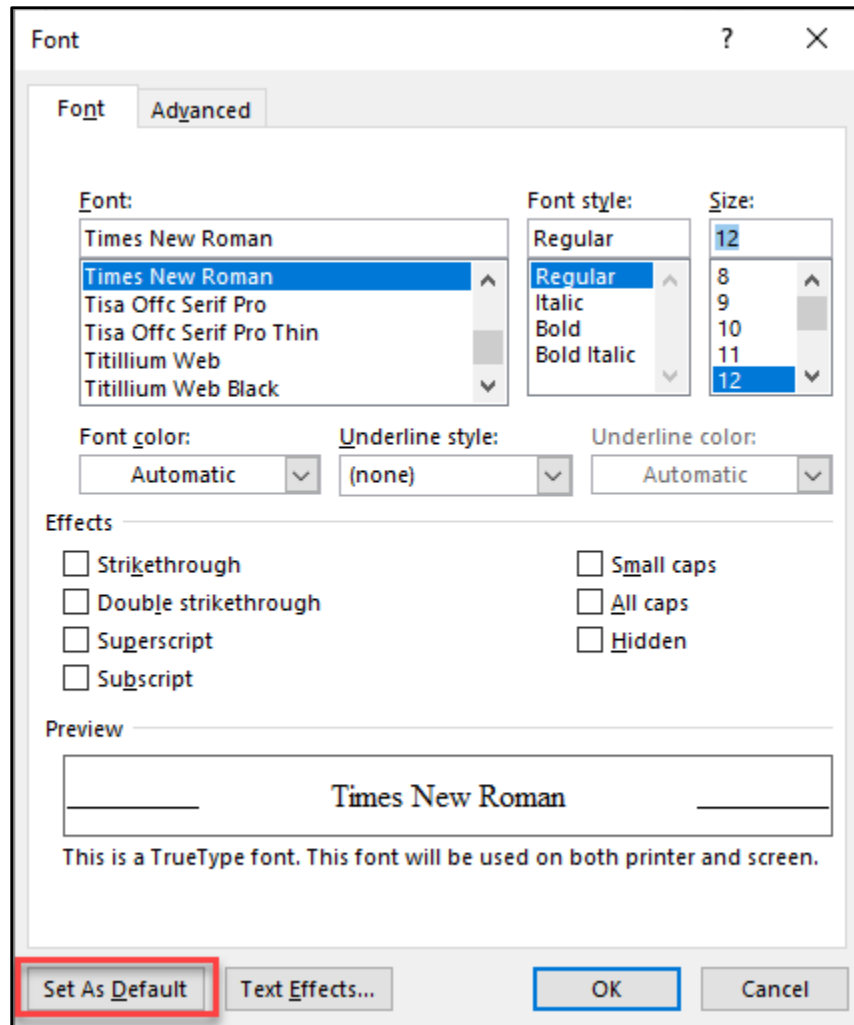


FIGURE 11-13

5. Check **All documents based on the Normal.dotm template**.
6. Click **OK**.

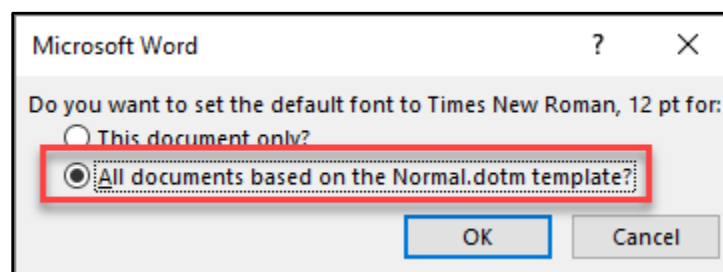


FIGURE 11-14

## Change Your Default Paragraph Formatting

Then change your default paragraph formatting:

1. Open a blank document in Word.
2. Click the **Home ribbon** ► **Paragraph launcher**.

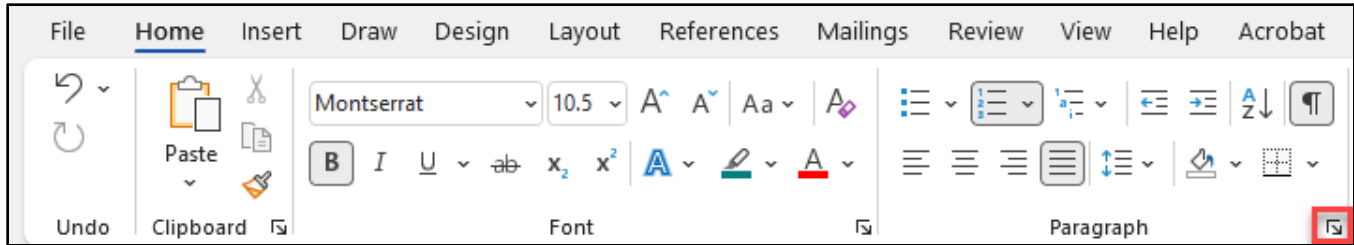


FIGURE 11-15

3. Recommended changes to the Paragraph dialog (Indents and Spacing tab):
  - Leave left and right indentation at 0" and Special at "(none)"
  - Make spacing before and after 0 pt.
  - Line spacing Single
  - If you prefer, switch the Alignment to Justified
4. Click the **Set As Default** button.
5. Check **All documents based on the Normal.dotm template**.
6. Click the **OK**.

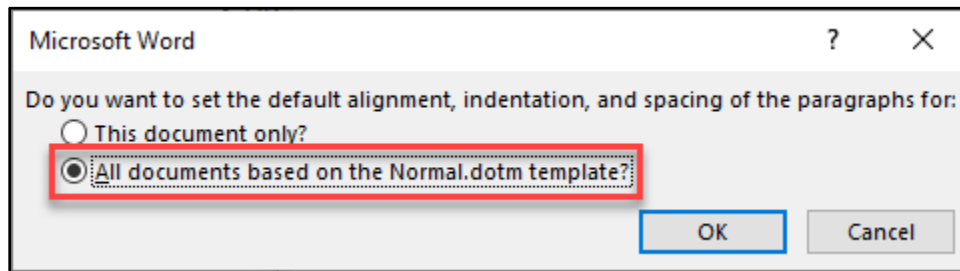


FIGURE 11-16

## Change Your Default Section Formatting

Finally, change your default section formatting:

1. Open a blank document in Word.
2. Select the **Layout ribbon** ► **Page Set Up launcher**. This will make the Page Setup dialog appear.
3. Recommended changes to the Section dialog:
  - Margins tab: Most legal users prefer 1" margins on all sides.
  - Layout tab: If you normally do not page number the first page of your documents, check the box for Different First Page.
4. Click the **Set as Default** button.
5. Click **Yes**.

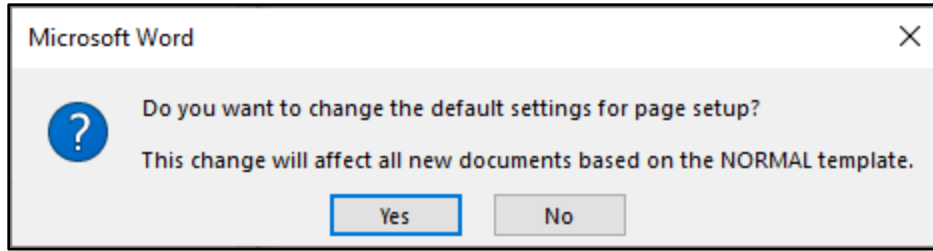


FIGURE 11-17

## Default Settings Do Not Affect Existing Documents

It is important to note that the foregoing changes to your default template do not affect, in any way, documents you've created in the past. In other words, when you open a document, you created before making these changes, it will retain its original formatting and will not automatically morph to your new default settings. The changes made previously will only apply to **new** documents you create in Word.

Initially, you might wish that default setting changes would automatically affect your existing documents. However, it would be extremely problematic if that were the case because every time you created a document and formatted it just the way you wanted, it would completely reformat itself as soon as someone else opened it in Word (assuming that their formatting defaults weren't exactly like yours).

## Customizing the Status Bar

The Status Bar is the bar at the bottom of the word screen which by default shows you the page number, among other things.

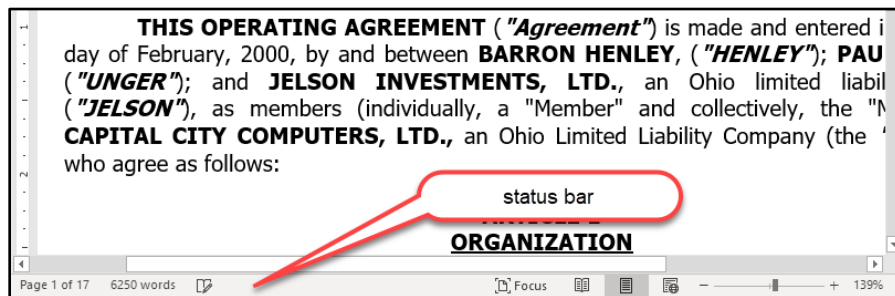


FIGURE 11-18

Simply right-click the **Status Bar** to see the options that can be added to it.

Customize Status Bar	
<u>F</u> ormatted Page Number	1
S <u>e</u> ction	1
✓ <u>P</u> age Number	Page 1 of 17
<u>V</u> ertical Page Position	
L <u>i</u> ne Number	
<u>C</u> olumn	
✓ <u>W</u> ord Count	6250 words
<u>C</u> h <sup>a</sup> racter Count (with spaces)	37661 characters
✓ <u>S</u> pelling and Grammar Check	Checking
✓ <u>L</u> anguage	
✓ S <u>i</u> gnatures	Off
<u>I</u> nformation Management Policy	Off
<u>P</u> ermissions	Off
<u>T</u> rack Changes	Off
✓ <u>C</u> aps Lock	Off
<u>O</u> vertype	Insert
Selection Mode	
<u>M</u> acro Recording	Not Recording
Accessibility Checker	
✓ <u>U</u> pload Status	
✓ Document <u>U</u> pdates Available	
✓ Focus	
✓ <u>V</u> iew Shortcuts	
✓ <u>Z</u> oom Slider	
✓ <u>Z</u> oom	139%

FIGURE 11-19

Consider turning on the following options:

- **Formatted Page Number:** Shows the page number as displayed on the page. For example, if you start page numbering over in the second section, it will display "1" instead of the page number of the document. See page 190 for instructions on starting page numbering over.
- **Section:** Shows the current section number.
- **Track Changes:** Indicates whether tracked changes are on or off. Tracked changes can be toggled on or off by clicking on this section of the Status Bar.
- **Caps Lock:** Indicates that caps lock has been turned on.

## Turning On the Ruler

The ruler shows your margins, paragraph indents, and tabs a glance. It is turned off by default.

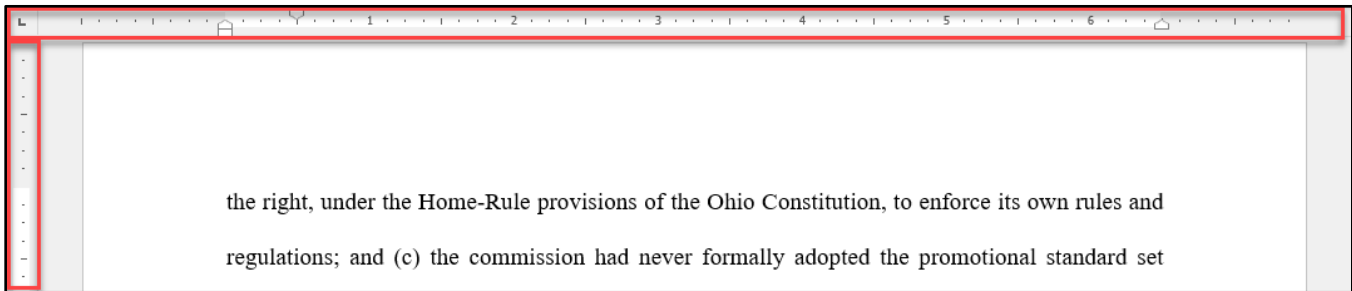


FIGURE 11-20

To turn it on, open any document or a new blank document, click the **View ribbon** → **Show group** → **Ruler checkbox**.

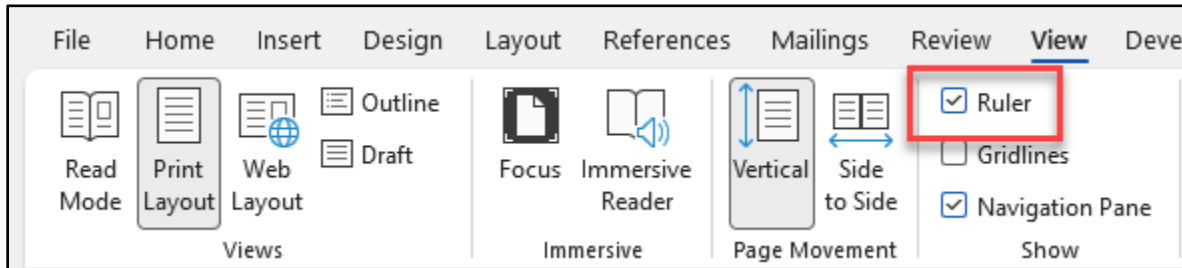


FIGURE 11-21

If you only see a ruler across the top but not down the side of the screen, click the **File menu** → **Options button** → **Advanced** → scroll down to the Display heading and check **Show vertical ruler in Print Layout view**.

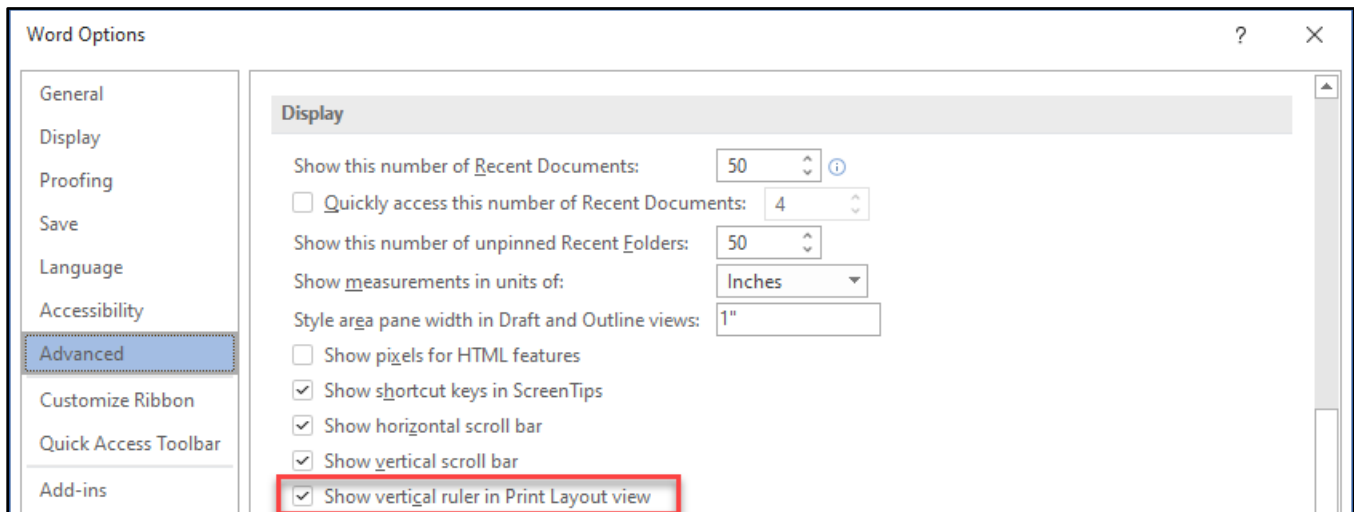


FIGURE 11-22



## Creating Keyboard Shortcuts

Keyboard shortcuts can be assigned to just about anything in Word. This is useful for increasing speed or for re-assigning WordPerfect shortcut keys to do the same things in Word. To create custom keyboard shortcuts:

1. Click the **File menu** → **Options button** → **Customize Ribbon button**.
2. Click on the **Customize...** button at the bottom of the screen.

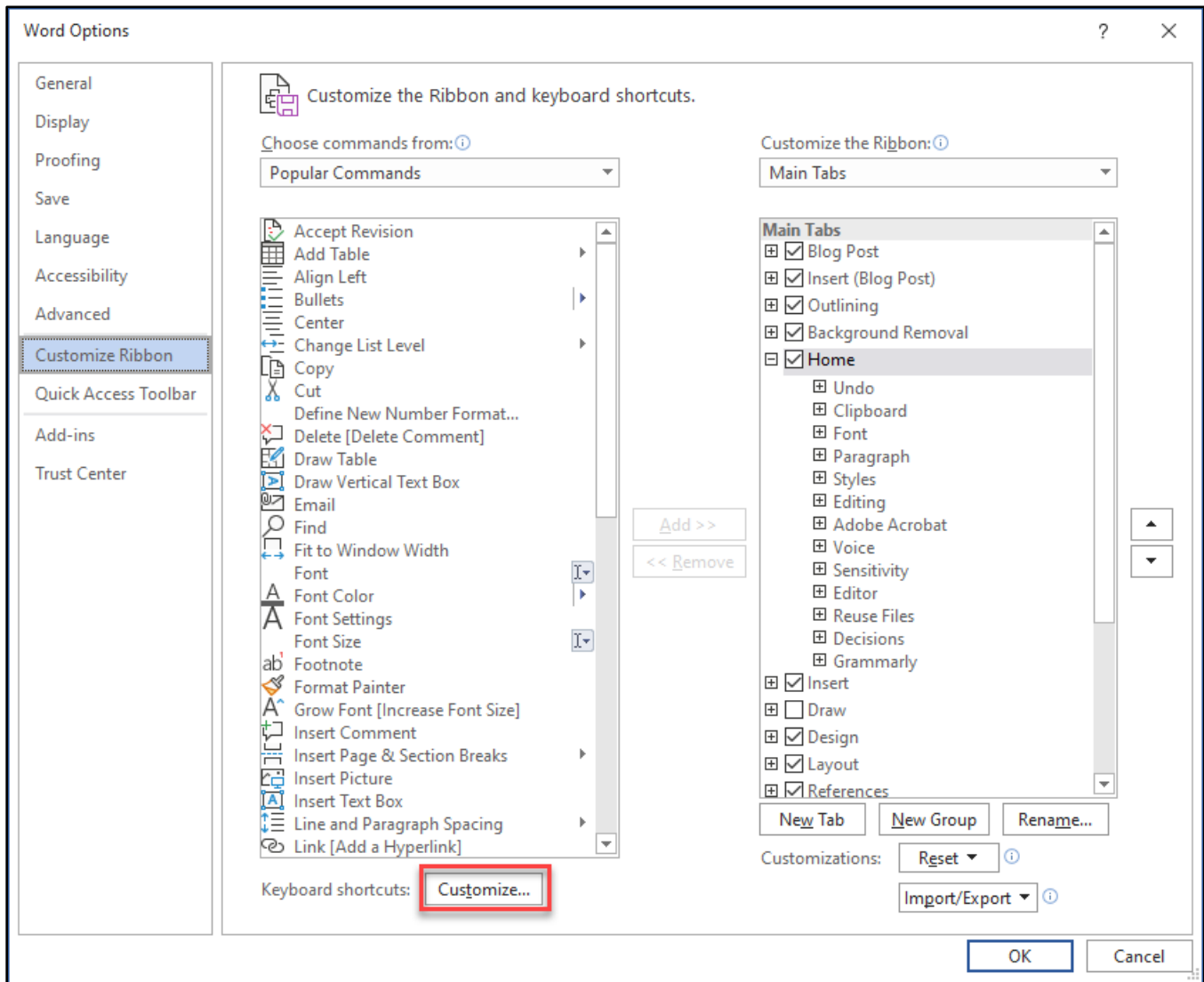


FIGURE 11-23

- On the left side, you'll see a list of Categories. If you don't know what category the particular function you're looking for is classified under, scroll down the list of Categories until you see **All Commands**. Once you do that, every command you can assign a keyboard shortcut to will appear in the list on the right. Click on the one you want to add a keyboard shortcut to:

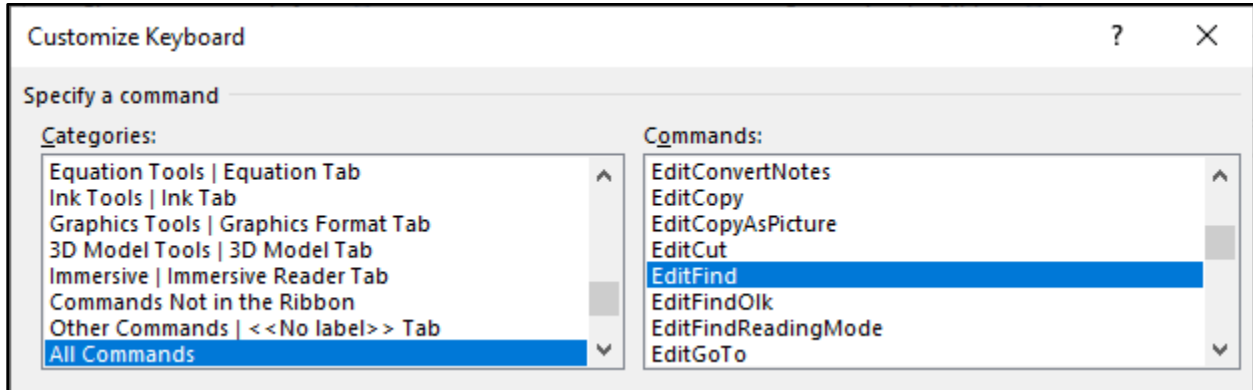


FIGURE 11-24

- Click into the **Press new shortcut key box** and press the desired keyboard shortcut.

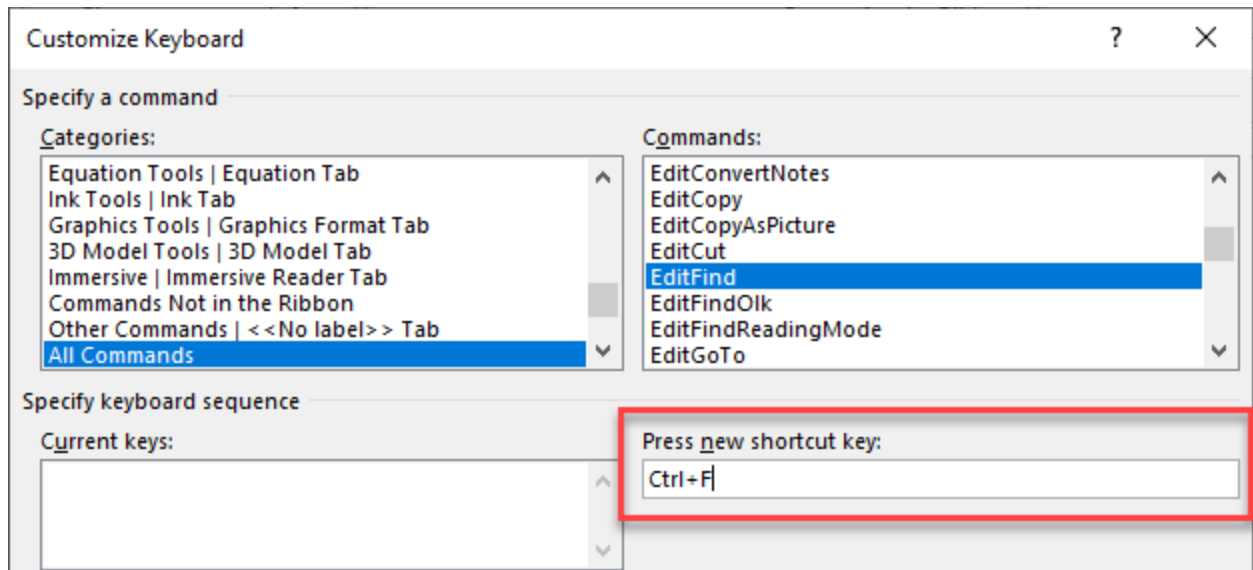


FIGURE 11-25

If the keyboard shortcut is already assigned to another command, an alert will appear. In that case, either delete the shortcut key and enter a new one or elect to override the existing keyboard shortcut by following the step below.

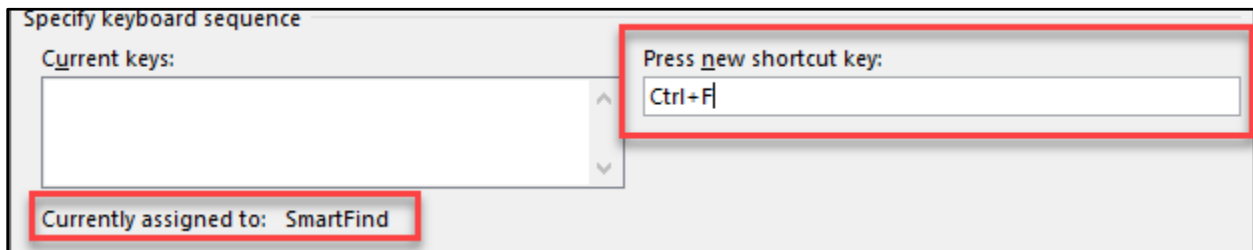


FIGURE 11-26

- Click on the **Assign** button to assign the keyboard shortcut.

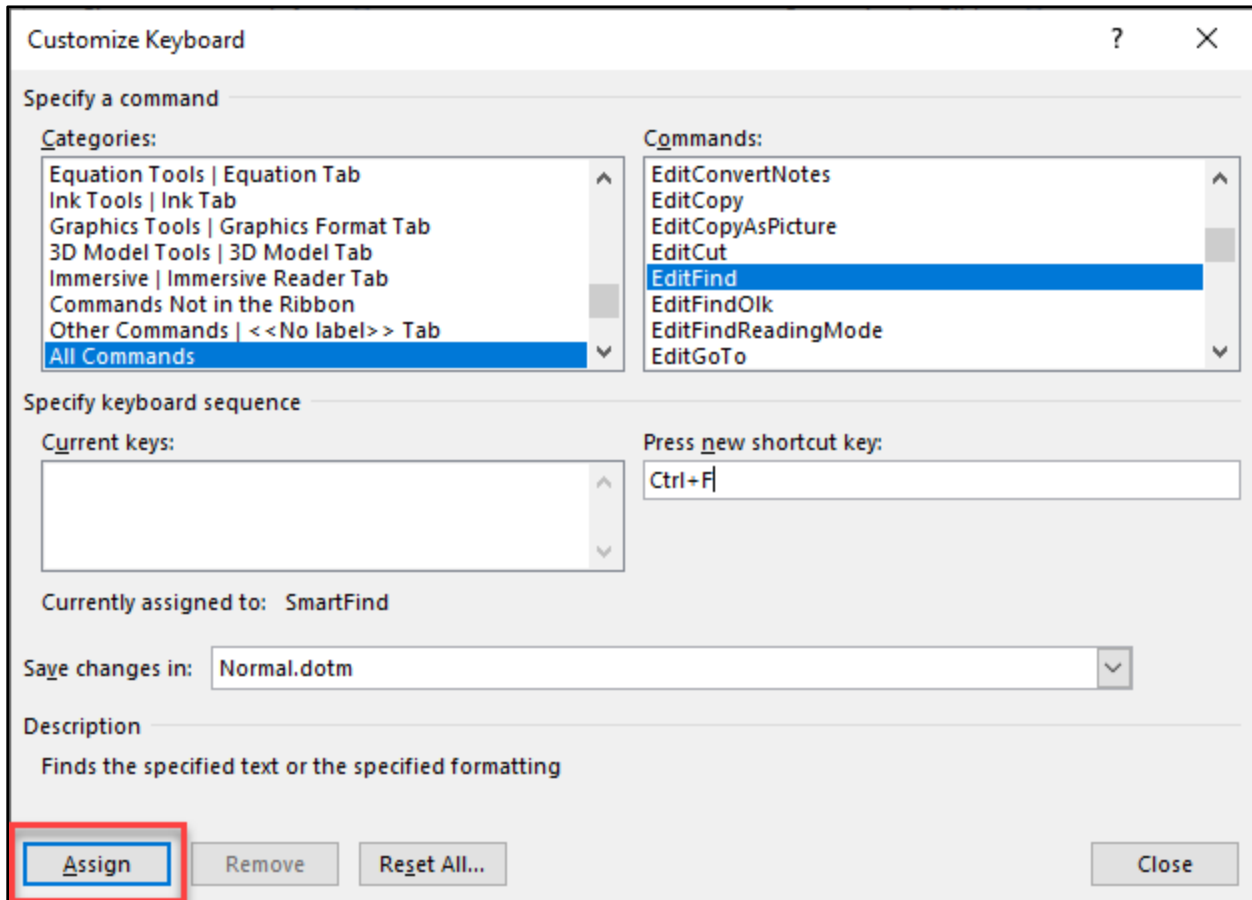


FIGURE 11-27

# CHAPTER 12

## WHERE TO GET HELP WITH WORD

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

### Options For Self Help


Your brief must be filed with the court by 5 PM today. It's 4 PM and the formatting won't cooperate, your table of authorities isn't working and the page numbering is all wrong. What are your options for figuring things out?

### Use Word's Built in Help

If you're using 365/2021, use Word's Help ribbon to open the Help pane.



FIGURE 12-1

In other versions, click the **Microsoft Word Help button**  in the upper right hand corner of the screen to open the help dialog box (SK: **F1**). Either browse through the topics, or type a keyword to search by in the box and click **Search**.

### Affinity Insight

Affinity Insight offers a Microsoft Word digital course and membership options that include on demand training videos on Microsoft Word (and more). See [www.affinityinsight.com](http://www.affinityinsight.com) for more information.

### Use the Word "Most Valuable Professionals" Web Site

This site is a wonderful, free collection of help on every imaginable topic with Microsoft Word. Just go to <https://wordmvp.com/> if you're using a Windows version of Word. If you use Mac, see <https://wordmvp.com/Mac/>. This site has an amazing array of help regarding Microsoft Word and it's all free.

## Use Microsoft's Web Site

Just go to <https://support.office.com/en-us/word> for comprehensive help on all things Microsoft Word.

## Call or Email Someone Who Can Help

At Affinity Consulting, there is no Word issue we can't solve. If you want to talk about support options, contact Barron Henley - [bhenley@affinityconsulting.com](mailto:bhenley@affinityconsulting.com). Affinity also offers a Word Emergency Room service. Just email your document to [WordER@affinityconsulting.com](mailto:WordER@affinityconsulting.com). It's \$100 per incident and the ER email address is monitored 7 days a week from 9 AM to 9 PM Eastern. Typical turn around is an hour or less.

## Three Golden Rules Legal Users Need to Know

- **How to know you're missing a feature:** If what you're doing in Word seems laborious, painful and slow, chances are that you're doing it wrong. They've automated almost everything you can imagine so there's probably a feature that makes the task you're struggling with much easier. Keep that in mind and you'll know when to start looking for a better way (and start looking through the foregoing sources of help).
- **Never use spaces to line anything up:** Spaces (using the space bar) are only to be used for separating words. They are not ever properly used to line something up. Lining things up is the job of tabs and indents and tables. Don't make this mistake.
- **Always click the More button.** In order to simplify the interface, a lot of features are tucked away under buttons that say things like "more." The only way you'll be able to see them is by clicking "More" buttons. If you see one in a dialog, *always* click it!

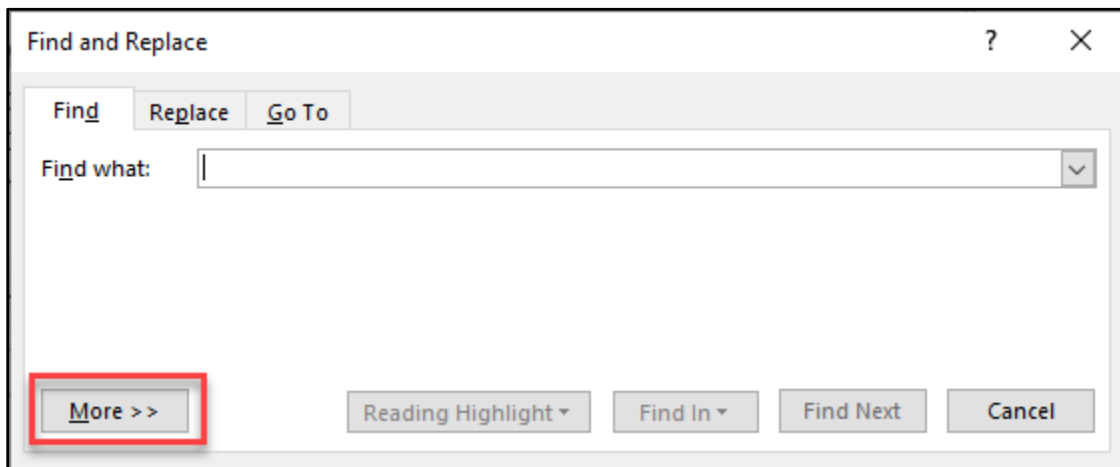


FIGURE 12-2

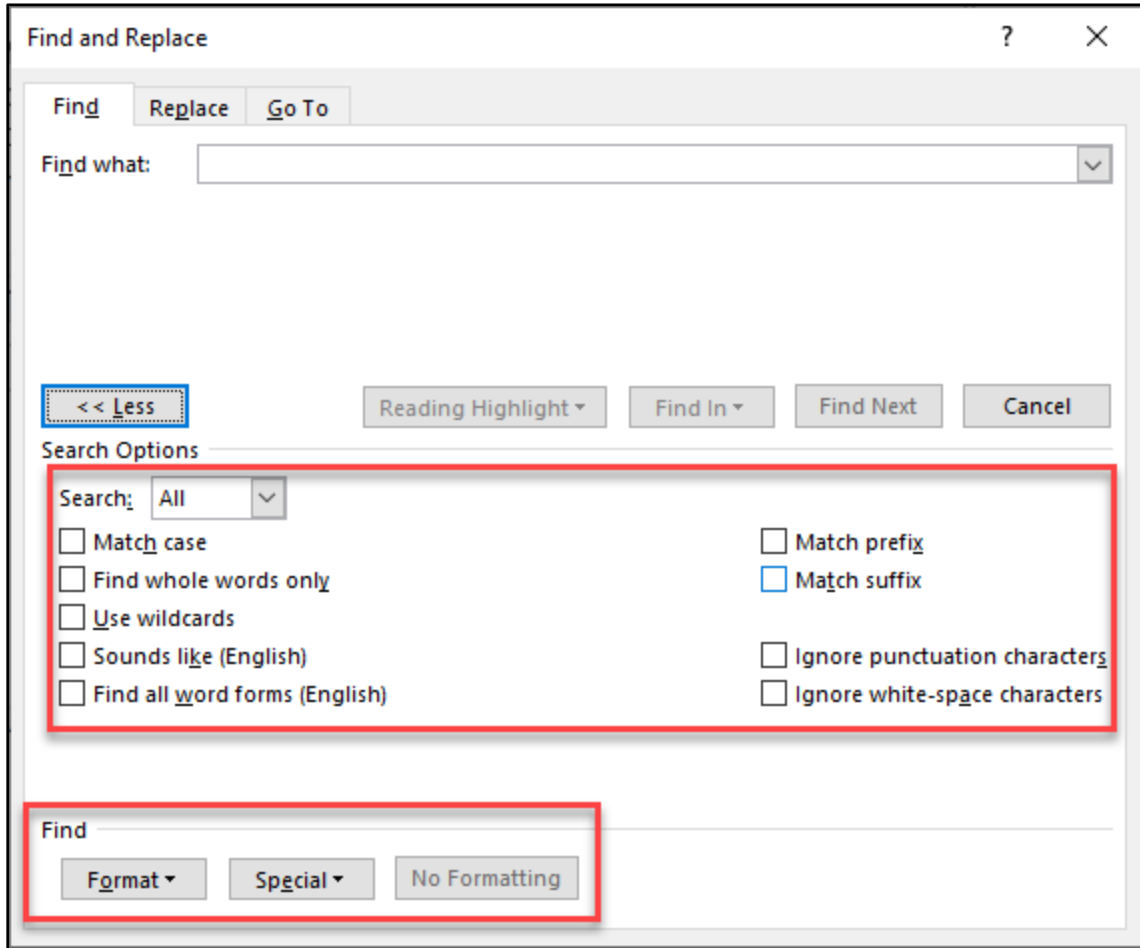


FIGURE 12-3

# CHAPTER 13

## BASICS

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Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

### File Operations

#### Create a New Document

When you start Word, you will be prompted to create a new file based on a choice of template. To create a new blank document, click the **File menu** → **New** → **Blank document** (SK: **Ctrl + N**).


#### Save a File

To save your document, either click the **File menu** → **Save** or click the **Save button**  on the **Quick Access Toolbar** (SK: **Ctrl + S**). In 365/2021, the save button is located in the **Title bar** at the top of the screen.

#### Using Save As

Use the **Save As** command from the **File menu** for the following purposes: (1) to save a document with a different file name; (2) to save a document in a different location; or (3) to save as a document template or some other format (RTF, for example). To use Save As, simply click **File menu** → **Save As** (SK: **F12**).

#### Closing a Document

To close a document, click the **File menu** → **Close**. You may also want to add the Close File button to the Quick Access Toolbar which looks like this:  **Open**.

If there were changes made since the last save, Word will ask you if you want to save the changes.

#### Opening a Document

To open a saved document, click the **File menu** → **Open** (SK: **Ctrl + O**).

## Screen View Options on the View Ribbon

There are many ways to view documents in Word. To see a list of your options, click on the **View ribbon**. Figure 13-1 shows the options in Word 2019. The four groups and their respective buttons shown in Figure 13-1 are explained below.

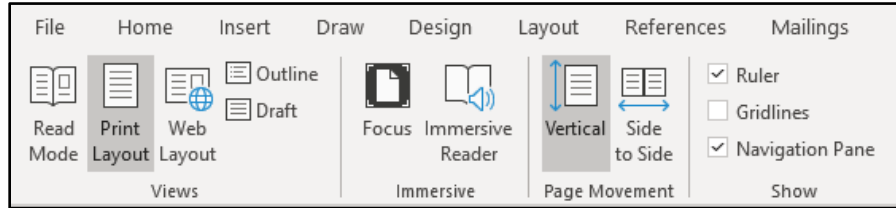



FIGURE 13-1

Note, you can also change screen views by clicking the buttons in the bottom, right corner of the Word screen: .

### Views Group

- **Read Mode:** If you are opening a document primarily to read it, reading layout view optimizes the reading experience. Reading layout view hides all toolbars except for the Reading Layout and Reviewing Toolbars.
- **Print Layout:** View document as it will be printed (WYSIWYG). You can see headers and footers, and the borders of the page. **RECOMMENDED** for drafting and editing legal documents.
- **Web Layout:** Displays your document as it would appear in a Web Browser. This is really only helpful if you are planning to publish your Word document as html.
- **Outline:** Outline view shows the document's structure. The indentations and symbols in outline view do not affect the way your document looks in normal view and do not print.
- **Draft (Normal):** Simplified view, but not WYSIWYG and you can't see headers or footers. This view is recommended if you're trying to locate section breaks in a document. It can also show you the styles applied to each paragraph in a styles area pane. To see the styles, go to **File menu → Options → Advanced → Display**, set **Style area pane width in Draft and Outline views** to 1".

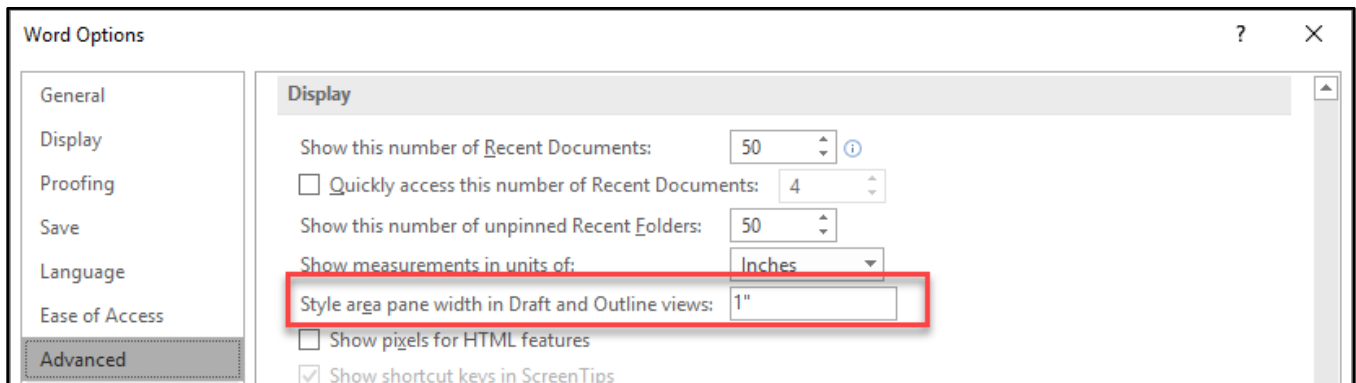


FIGURE 13-2



With the style area pane set to 1", the document will look like this in Draft view.

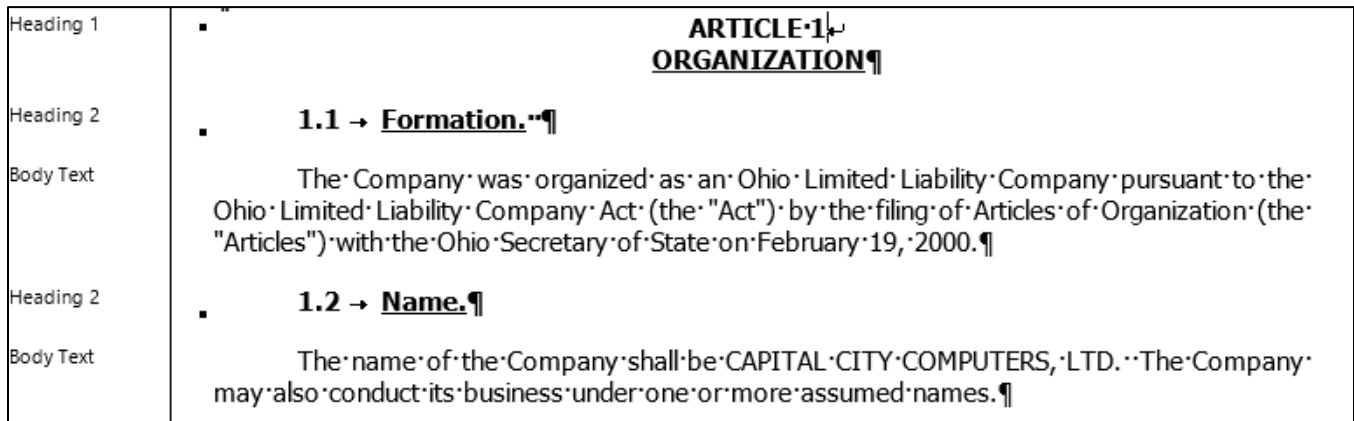


FIGURE 13-3

## Immersive Group

Note that this group appears only in Word 2019/365/2021 versions of Word. In 2019, click on the Learning Tools button. In 365/2021, click on the Immersive Reader button.

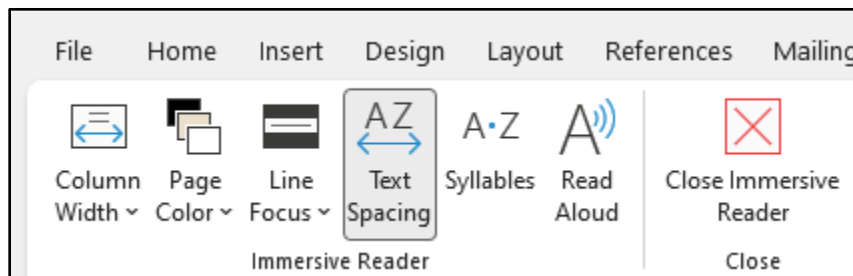


FIGURE 13-4

## Page Movement Group

Note that this group appears only in Word 2019/365/2021 versions of Word.

- **Vertical:** In previous versions of Word, this was the only way one could browse pages.
- **Side to Side:** This is a new option which freezes the zoom but allows you to read your document like a book in Word. Note also that when you click Side to Side, you'll get another new button called Thumbnails to the right of it. You can click the Thumbnails button to quickly navigate to another page by simply clicking on it.

## Show Group

- **Ruler:** You definitely want this turned on at all times so you can see what is going on with tabs and indents in your document. If this is unchecked, please check it. Word will remember this action so you should not have to keep checking the Rule on every time you use Word.
- **Gridlines:** This is useful for lining up graphics in your document, but isn't needed for the typical legal document.
- **Navigation Pane:** Turns on a vertical pane along the left side of the document which outlines the document structure. However, this feature is only useful if you've used

Heading styles to format your document. If you've done this, it allows you to view an outline of your document (which Word creates automatically), and quickly move to any section of the document by simply left clicking on the heading in the navigation map. Furthermore, you can drag items shown in the Navigation Pane to new locations with your mouse and thereby easily change the structure of the document. This is very handy when drafting long briefs, motions, and articles.

## Zoom (Magnify) Screen View

You can change the way the document appears on your screen without changing the way it prints. This is accomplished by using the zoom feature in Word. Methods include:

- Click the **View ribbon**, in the **Zoom Group** select **Zoom**.

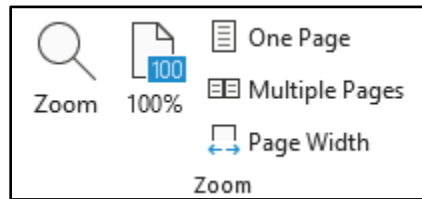


FIGURE 13-5

or

- Use the slider at the bottom, right corner of the screen:



FIGURE 13-6

or

- **EASIEST METHOD:** If you have a mouse that has a scroll wheel between the two mouse buttons, then you can zoom in and out easier by holding down on a **Ctrl key** on your keyboard while scrolling up or down.

## Viewing Two Sections of the Same Word Document Simultaneously

There are often circumstances when you're drafting one part of a document but need to see another part of the document as the same time for reference purposes. For example, while drafting, I might need to see the names of all of the parties in the first paragraph or a definitions section at the end. There are two main ways to accomplish this.

### Splitting a Document

This is useful if you have one monitor. If you have more than one screen, then you might want to use the next method explained (New Window). Anyway, to split a document, first open the one you want to edit. Click the **View ribbon** → **Split button** in the **Window Group**. Now a gray bar will appear roughly in the middle of your document, splitting the screen in half. Thereafter, you can scroll up and down in each half of your document independently. You can also drag the split border up and down to change the relative sizes of the top and bottom split. To go back to a single document view, click the **View ribbon** → **Window Group** → **Remove Split button** or drag the gray bar up into the ribbon until it disappears.

## New Window

This is great if you have two or more monitors because you can effectively open the same document twice and have one on each screen. Of course, you can be in different places in the same document on each screen. When you save one, it saves the other and anything you do in either version of the open document also happens in the other version. To do this click the **View ribbon** → **New Window button** in the **Window Group**. Of course, if you have one screen, you could put one document on the left side of your screen and one document on the right side of your screen. If you have Windows 8, or 10, you can easily make a window occupy one half of your screen by holding down on the Windows logo key on your keyboard and hitting the left or right arrow keys as appropriate.

### Legal Tip - Full Screen Edit Mode

If you want the document to use the maximum area of your monitor, then you want to toggle to Full Screen Edit mode. To do so, hold down on the **Alt key**, then hit **V** and **U** consecutively.

To turn this off, just hit the **Esc key**.

## Print and Print Preview

**File menu** → **Print** (SK: **Ctrl + P**)

## Protecting Against Lockups and Document Corruption

Since legal professionals tend to use the word processor all day, every day, if a computer locks up it usually results in lost work. Word has several built-in features to help you avoid losing what you've typed.

### How to Recover a Corrupted Word File

If Word refuses to open a document you've previously created due to a corruption in the file, follow these steps:

1. **File menu** → **Open** → **Browse** (SK: **Ctrl + O**).
2. Locate and select (single left click) the file you think may be corrupted.
3. Now, click the **down arrow** adjacent to the Open button and choose **Open and Repair**.

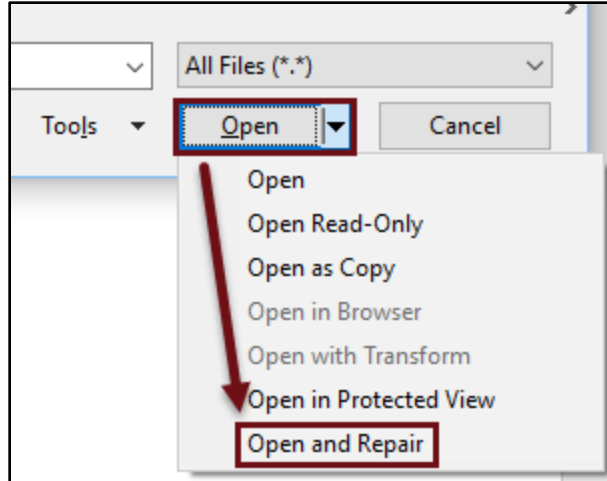


FIGURE 13-7

4. If the document is recoverable, Word will repair and open it.

This feature is also useful if you have a document which keeps locking up Word or exhibiting bizarre behavior, which usually precipitates a crash. Try saving it, closing it and then using the Open and Repair feature to see if Word finds and repairs any latent corruptions in the document.

# CHAPTER 14

## EDITING TOOLS

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

### Navigating Long Documents

To navigate through text, one may use keystrokes or the mouse.

Shortcut Keys for Moving the Insertion Point:

<b>Left Arrow</b>	.....	One character to the left
<b>Right Arrow</b>	.....	One character to the right
<b>Ctrl + Left Arrow</b>	.....	One word to the left
<b>Ctrl + Right Arrow</b>	.....	One word to the right
<b>Ctrl + Up Arrow</b>	.....	One paragraph up
<b>Ctrl + Down Arrow</b>	.....	One paragraph down
<b>Shift + Tab</b>	.....	One cell to the left (in a table)
<b>Tab</b>	.....	One cell to the right (in a table)
<b>Up Arrow</b>	.....	Up one line
<b>Down Arrow</b>	.....	Down one line
<b>End</b>	.....	To the end of a line
<b>Home</b>	.....	To the beginning of a line
<b>Alt + Ctrl + Page Up</b>	.....	To the top of the window
<b>Alt + Ctrl + Page Down</b>	.....	To the end of the window
<b>Page Up</b>	.....	Up one screen (scrolling)
<b>Page Down</b>	.....	Down one screen (scrolling)
<b>Ctrl + Page Down</b>	.....	To the top of the next page
<b>Ctrl + Page Up</b>	.....	To the top of the previous page
<b>Ctrl + End</b>	.....	To the end of a document
<b>Ctrl + Home</b>	.....	To the beginning of a document
<b>Shift + F5</b>	.....	To a previous revision or the location of the insertion point when the document was last closed
<b>Ctrl + G (or F5)</b>	.....	Go to a specific page number
<b>Ctrl + F6</b>	.....	Toggle between open documents

### Undo and Redo Shortcut Keys

<b>Ctrl + Z</b>	.....	Undo an action
<b>Ctrl + Y</b>	.....	Redo or repeat an action

### Inserting Text

When Word opens an existing document, the document is already in Insert mode. This simply means that existing text, to the right of the cursor, is moved to the right as you type new text.

## Selecting Text

To manipulate text, that is to copy, move, delete or format text, you must first select it. Text which has been selected will be highlighted.

### Two Methods

1. Point the mouse to the beginning of the text that you want to select.
2. Click and hold down the left mouse button. Drag the shadow pointer across the text you want to select. The text should be highlighted. Release the mouse button.

or

1. Place the cursor at the beginning of the text you want to select.
2. Hold down the **Shift key** and simultaneously hit any of the navigational shortcut key combinations described above. *The advantage to selecting text this way is that you do not lose the highlighted text if there is an interruption while highlighting – you can stop and go as many times as you desire, unlike selecting text with the mouse. This method of selecting text is also more precise than using the mouse.*
3. The text should appear highlighted.

Once the text is selected, it can be deleted, copied, or replaced.

### Selecting with the Mouse - Multiple Techniques

Select a word.....	Double click the word
Select a sentence .....	Ctrl + click while hovering over the sentence
Select a line.....	Click once in the left margin of the line
Select a paragraph.....	Triple click in the paragraph
Select a block of text.....	Click once at the beginning of the block, then Shift + click at the end of the block
Select the entire document.....	Ctrl + click in the left margin

### Selecting with the Keyboard - Multiple Techniques

Select one character at a time.....	Shift + ⇨ or Shift + ⇩
Select a word at a time.....	Ctrl + Shift + ⇨ or Ctrl + Shift + ⇩
Select a screen at a time.....	Ctrl + Page Down/Page Up
Select the rest of the document.....	Ctrl + Shift + End
Select a word.....	F8 twice
Select a sentence .....	F8 three times
Select a paragraph.....	F8 four times
Select the entire document.....	Ctrl + A or F8 five times

### Selecting Non-Linear Blocks of Text

Hold down the **Alt key** on your keyboard while selecting with the mouse and you can select non-linear sections of text. This is particularly helpful if you need to select all of numbers or bullets in a list.

## Selecting Non-Contiguous Text

Let's say you want to copy paragraphs 3, 5 and 7 from an old Lease Agreement and paste them into a new Lease Agreement you're drafting. That used to be a three-step process because you would have to copy and paste each paragraph individually, since they weren't right next to each other in the source document. Now you can do it all at once.

Just select the first paragraph as you normally would. Now, if you hold down the **Ctrl key** and select the other two paragraphs, you'll see that your original selection remains. In this manner, you can select as many sections of text as you would like, as long as you're holding down the **Ctrl key**.

## Deleting Text

Select the desired text; and hit the **Delete key** on your keyboard.

### Shortcut Keys

<b>Delete</b> .....	Deletes text the right of the cursor
<b>Ctrl + Delete</b> .....	Deletes the word to the right of the cursor
<b>Backspace</b> .....	Deletes text to the left of the cursor
<b>Ctrl + Backspace</b> .....	Deletes the word to the left of the cursor

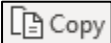
## Replacing Text

Select the desired text, simply start typing and the highlighted text will disappear and be replaced by your new text.

## Copy, Cut and Paste

Most lawyers draft new documents by using sections of documents they've created in the past as source material. Therefore, the ability to copy, cut (move) and paste (insert) text from one document to another, or from one place inside a document to another place inside the same document, is critical.

### Copy and Paste:

1. Select the text you want to copy.
2. Click the **Home ribbon** → **Clipboard group** → **Copy button**  (KS: **Ctrl + C**).
3. Place your cursor where you want to place the copied text and hit the **Home ribbon** → **Clipboard group** → **Paste button** (KS: **Ctrl + V**). Note, the Paste button has two parts (top

and bottom). To do a straight paste, you need to click the top half of the Paste button. The bottom half of the button presents you with options:

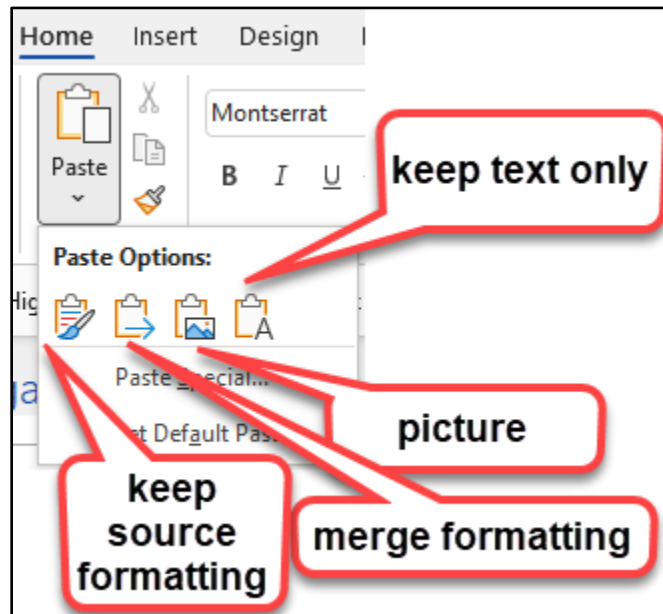



FIGURE 14-1

### Moving (Cut and Paste):

1. Select the text you want to copy.
2. Click the **Home ribbon** → **Clipboard group** → **Cut button**  (KS: **Ctrl + X**).
3. Place your cursor where you want to place the copied text and click the **Home ribbon** → **Clipboard group** → **Paste button** (KS: **Ctrl + V**).

### Drag and Drop Text Editing

If this feature allows you to select text, place the cursor anywhere in the highlighted area, hold down on the left mouse button and drag the text to another location (or program).

### Solution to Formatting Problems when Pasting Text

Many Word users have struggled with formatting glitches that arise when one pastes text from one document into another which contains different formatting. Paste Options


You can turn on and off Paste smart tags and control the settings by clicking **File menu** → **Word Options/Options** → **Advanced** → **Cut, Copy and Paste** and checking or unchecking the **Show Paste Options checkbox**.

### Legal Tip - Strip Formatting Off of Copied Text When Pasting

If you've ever copied the text from a case or statute you've found on-line into a document in Word, then you've probably encountered formatting problems. In many cases, the text and formatting in the target document gets screwed up the second you click "paste." This is particularly true when copying from the Internet because the pasted text often retains the graphics, tables and HTML formatting that it had on the Internet.



A great way to avoid this problem is to follow these steps paste "unformatted text":

1. Select and copy the text you want from an Internet web page or any other program;
2. Open the document in Word (or WordPerfect) into which you want to paste the text;
3. Click the **Home ribbon** ➔ **Clipboard group** ➔ bottom half of the **Paste button** (see Figure 14-2) ➔ click the  **button** (Keep Text Only). The text will assume the formatting of the target document and, in the case of text from a web page, it will be stripped of all graphics and other bothersome formatting characteristics.

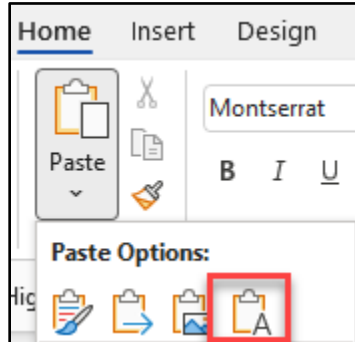


FIGURE 14-2

## Copying Text From Multiple Sources for Insertion into a New Document

Let's say you're drafting a new document and you need to pull provisions from many different sources (statutes, old documents, the Internet, etc.). Word now gives you a way to gather those provisions (paragraphs, phrases, etc.) all at once, without having to jump back and forth between the source documents and the destination document. Once drafting the new document, you can drop the various provisions you've gathered into the document whenever and wherever you need them. This same feature (described below) also enables you to quickly insert a long, cumbersome phrase, that must be entered repeatedly into the document you're drafting (such as "Ohio State Legal Services Association, a nonprofit law firm"), instead of re-typing it.

### Word's 24 Clipboards

WordPerfect only has one clipboard. Therefore, if you copy a paragraph from document A, then copy a different paragraph from document B, the text from document B will over-write the text you previously collected from document A. To eliminate this problem, Word added 23 additional clipboards. To activate Word's 24 Clipboards, click the **Home ribbon** ➔ **Clipboard launcher**. The dialog in Figure 14-3 will appear on the right side of your Word window:

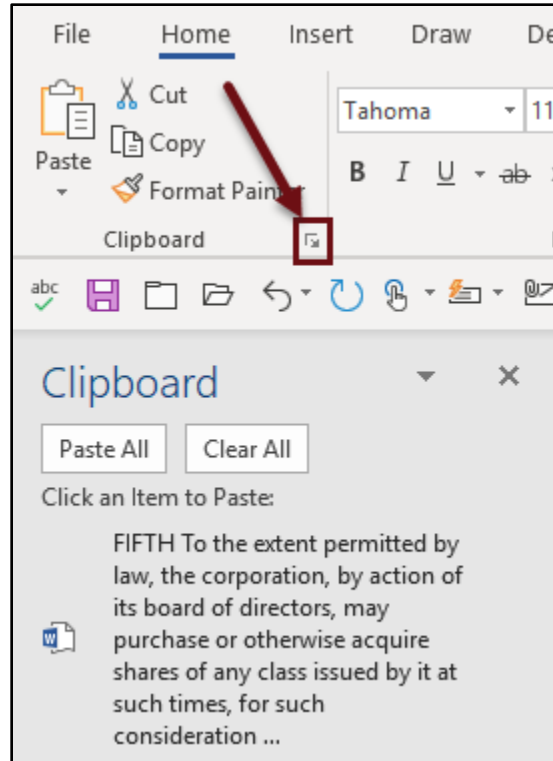


FIGURE 14-3

As you can see, it is possible to see quite a bit of the copied text. If you click the **down arrow** to the right of any of the copied sections of text, you'll see the menu in Figure 14-4.

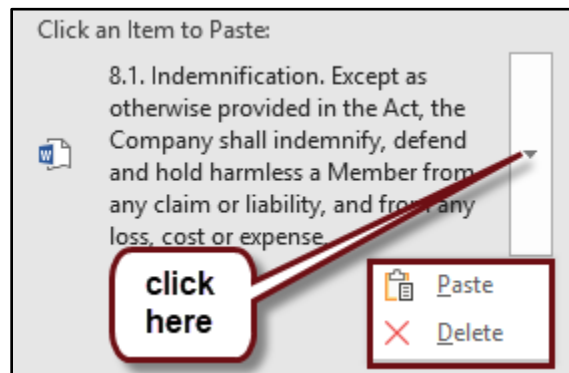


FIGURE 14-4

By choosing **Delete**, you can remove that particular selection of text from your collection of copied text. You can also paste it from the same menu. Note that these clipboards will work in every Office application and you can copy and paste text from one of the component programs to another.

Finally, by clicking the **Options** button at the bottom of the Clipboard pane, you have the following options regarding how and when the clipboard pane appears (see Figure 14-5).

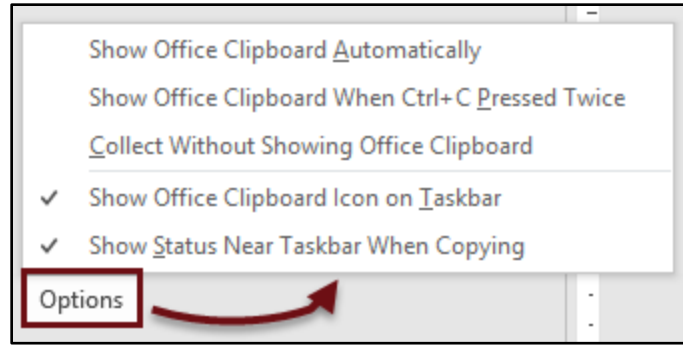


FIGURE 14-5

## Legal Tip - Using Go To for Quick Navigation

Need to quickly jump to page 72 of a 163 page document? You can use the **Go To** command to jump to a particular page, section, line, bookmark, comment, footnote, endnote, field, table, graphic, equation, object or heading. Click the **Home Ribbon** → **Editing group** → **Find button arrow** → **Go To...** (SK: Ctrl + G).

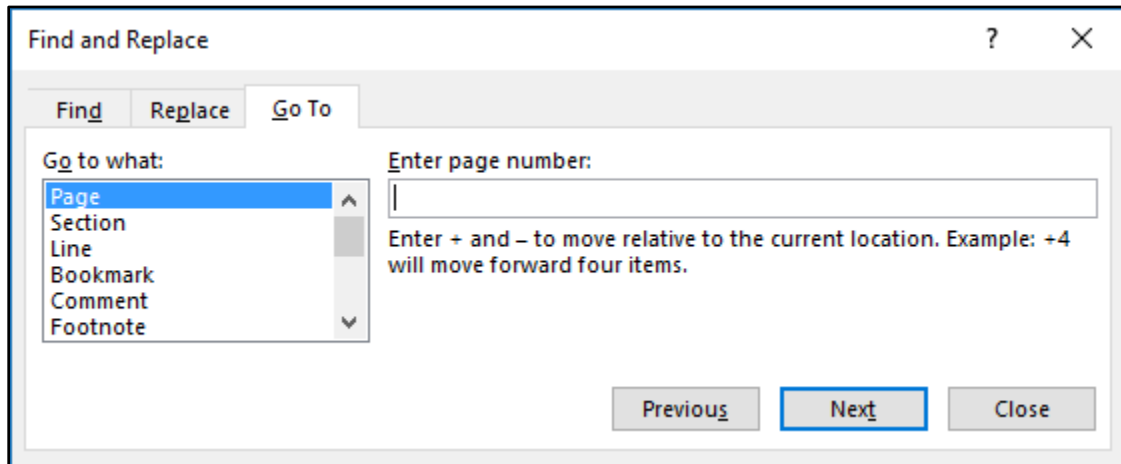


FIGURE 14-6

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

### What Is a Bookmark?

A bookmark is an invisible marker in a document that you create and name for future reference. You can use bookmarks to quickly jump to a specific location, create cross-references, mark page ranges for index entries, and the like. When working in very long documents, bookmarks can help you navigate much quicker.

### How Lawyers Use Bookmarks

Lawyers are always opening long documents and looking for a specific section. Bookmarks make it easy for you to mark those sections so you can get to them faster. You can have as many as you would like in any particular document and you can name them whatever you want.

If you draft by pulling certain provisions from other documents you've created in the past, you can mark them with bookmarks so that when you open those documents in the future, you can "jump" right to the provision you need to copy.

When I draft documents, I frequently refer to other sections within the same document. When I do that, I like to cross-reference to the paragraph number or page number of the referenced section. For example:

B. **Notification when Service Required:** SERVICER will provide on-going routine maintenance for all Covered Computers. However, CUSTOMER shall have the responsibility of determining when a Covered Computer requires service. At such time as CUSTOMER determines that a problem exists with one of the Covered Computers, CUSTOMER shall call the telephone numbers specified in paragraph **3.C** above (or such other number as SERVICER may from time to time designate) during Service Hours (defined in paragraph **3.B** above) and provide the information which will then be requested. Arrangements for service during Service Hours will then be made based on the type of service specified herein.

By placing bookmarks in those paragraphs, I can easily have Word automatically insert the appropriate paragraph number into the document for me. Furthermore, if the paragraph or page number changes because I've added or deleted text, the cross reference will update itself.

## How to Create a Bookmark

To create a bookmark, execute the following steps:

1. Place the cursor in the document where you would like to insert a bookmark.
2. Click the **Insert ribbon** → **Links group** → **Bookmark** (SK: **Ctrl + Shift + F5**).
3. Under **Bookmark name**, type or select a name. **NOTE:** Bookmark names must begin with a letter (although they can contain numbers) and they cannot contain spaces (underscores are OK).
4. Click **Add**.

## How to "Jump" to a Bookmark

There are two ways to jump to a bookmark:

- **Insert ribbon** → **Link Group** → **Bookmark button** (SK: **Ctrl + Shift + F5**).
- **Home ribbon** → **Editing group** → **Find button arrow** (SK: **Ctrl + G**) → under **Go To** What select **Bookmark** → select the appropriate name under **Enter bookmark name** → **Go To button**.

## How to See Bookmarks In Your Text

It is often useful to be able to see visual evidence of a bookmark. Even if you make them visible on your screen in Word, they will never print. Here's how you make them visible: Click the **File menu** → **Options** (left side, bottom) → **Advanced** → on the right side, scroll down until you see **Show document content** → check **Show bookmarks**. Once you do that, bookmarks will appear in your text as highlighted in Figure 14-7 below (they look like I bars). In order to determine what the particular bookmark is called, **select it** → **insert ribbon** → **bookmark button**. Word will highlight the name of the bookmark you've selected in the list that appears.

**2.1. Books and Records.** The Company shall maintain complete and accurate books and records of its business and affairs as required by the Act and such books and records shall be

FIGURE 14-7

## Searching (Find)

When you know the exact text you're looking for in a document, you can use the FIND command to go to it quickly. Click the **Home ribbon** ➔ **Editing group** ➔ **Down Arrow on Find button** ➔ **Advanced Find**. There are circumstances in which it can be very valuable to conduct pinpoint searches through large documents. In the dialog shown in Figure 14-8 below, make sure you click the **More** button to reveal all of the options shown in Figure 14-9.

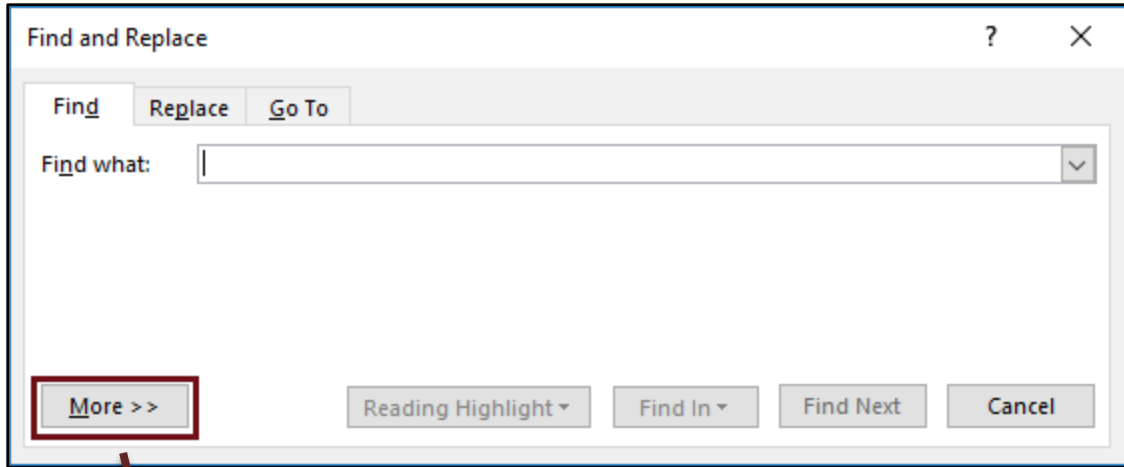


FIGURE 14-8

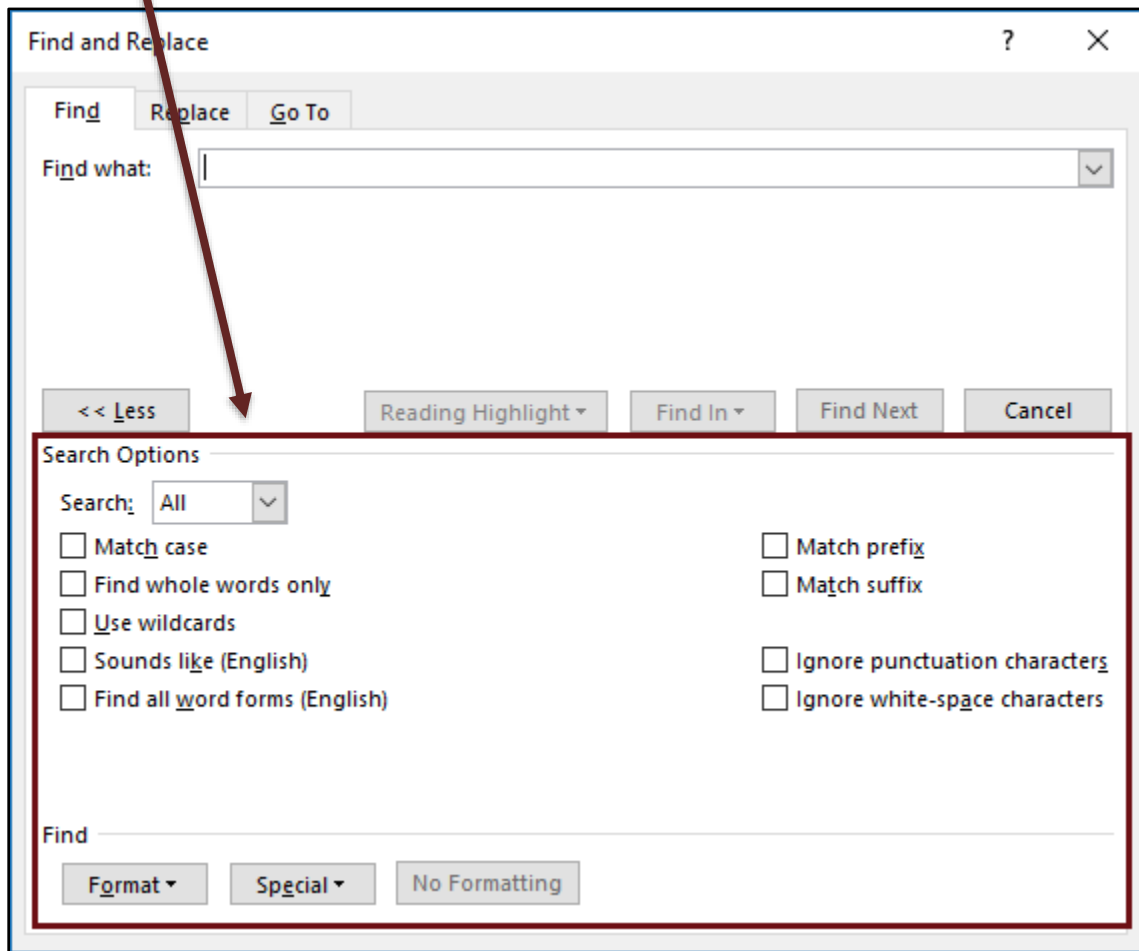


FIGURE 14-9

**NOTE:** As a general rule, if you ever see a **MORE button** in any Word dialog, you should click it. The **Find dialog** is no exception to this rule.

## Highlighting Hits

If you click the **Reading Highlight button** shown above in Figure 14-9 and conduct a search, Word will highlight all instances of the searched for word or phrase.

## Searching for Formatting Attributes

You can search not only for text, but by clicking the **Format button**, you can also search for formatting attributes. For example, if I wanted to find all italicized text in a document, I can leave the **Find what** box blank → **Format button** → choose **Font...** → set **Font style** to **Italic** → **OK**. Word will then search for any text which is italicized.

## Search for Special Characters

By clicking the **Special button**, you can search for non-printing and special characters like tabs, page breaks, section breaks, hard returns and the like.

## Use Wildcards To Expand Your Search

To fine-tune your search, use wildcards (see below) and make sure you check the **Use wildcards check box**. Though normally it doesn't matter, when you use wildcards, the search text is case sensitive. For example, a search for **s\*t** will find "sat" but not "Sat" or "SAT". (Notice that the **Match case check box** is dimmed to indicate that this option is automatically on; you can't turn off the option.) If you want to search for any combination of uppercase and lowercase letters, use the square brackets wildcard. For example, type **[Ss]\*[Tt]** to find "sat", "Sat", or "SAT."

To find	Use this wildcard	Examples
Any single character	?	s?t finds "sat" and "set".
Any string of characters	*	s*d finds "sad" and "started".

FIGURE 14-10

## Find and Replace

Whether lawyers will admit it or not, this technique plays a big role in the drafting of most legal documents. Find and replace allows you to scan the document for a group of characters and replace them with something else. For example, replace "he" with "she," or replace "Jones Equipment Rental" with "Smith Scaffolding." To access this function, click the **Home ribbon** → **Editing group** → **Replace button** (SK: **Ctrl + H**). This function is particularly useful for making quick global corrections or checking the case of a particular word (i.e., making sure that every instance of "Personal Representative" is capitalized throughout the document).

If you only want to search and replace within a particular section of the document, then select it first. Once Word finishes making all relevant replacements in the selected paragraph, it will ask you if you want to search the rest of the document. Just click **No**.

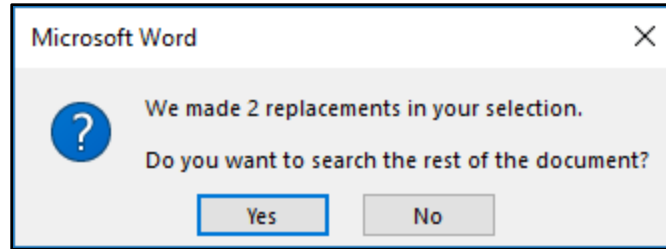


FIGURE 14-11



# CHAPTER 15

## PROOFING

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

Word has a built-in spell checker, thesaurus and grammar checker. In Word 2019/21/365, they are incorporated into the Editor pane.

By default, the spell checker and grammar checker work automatically in the background. Word underlines a word with a red, wavy line if the word is misspelled or a blue double or dotted line if there are grammatical issues or suggested revisions. Older versions of Word use a green, wavy line instead of the blue lines.

Word will not underline the misspelled word until you hit the spacebar after the last letter in the word is typed. Likewise, Word will not underline the grammatically questionable phrase until you start a new sentence or hit **Enter**. The underlining does not print.

### Customizing Spell and Grammar Check

To customize your spell and grammar check settings, go to the **File menu** → **Word Options** → **Proofing**.

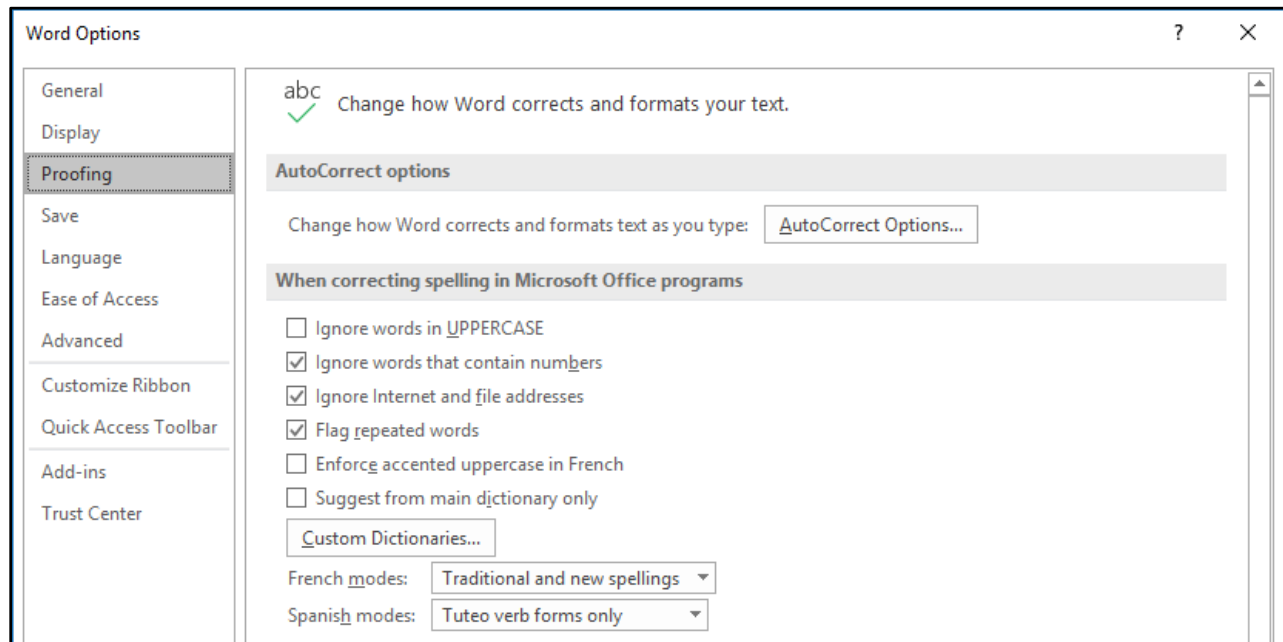


FIGURE 15-1

### Spell Check

Under **When correcting spelling in Microsoft Office programs**, we recommend the following settings:

- Uncheck **Ignore words in UPPERCASE**. This is checked by default. When it's checked, Word will *not* spell check any words in uppercase, including article and pleading titles.
- **Check spelling as you type** flags potential misspellings with red, wavy underlines. If nothing else, these red lines are a good reminder that you haven't run a spell check on your document.

## Grammar Check

In older version of Word, legal documents often contained a lot of green, wavy lines. As a result, many legal users simply turn off the grammar checker. The Editor, however, has significantly improved the grammatical recommendations.

In **Writing Style**, Word allows you to choose whether you want to check grammar *only* or grammar and refinements. If you choose **Grammar & Refinements**, you'll probably want to click the **Settings....** button and uncheck **Sentence Length**.

## Spell Check

To run a spell check, in Word 13/16, click the **Review ribbon** → **Proofing group** → **Spelling & Grammar** (SK: **F7** key). In 2019/21/365, click the **Review ribbon** → **Proofing group** → **Editor** (SK: **F7** key). In Word 2013/16, you'll get a Spelling pane on the right side of the screen; and in Word 2019/21/365, you'll get an Editor pane on the right side.

The Editor pane is designed to give you more grammar and writing suggestions. If you have the Editor pane, an initial spell check will open a dialog like the one shown in Figure 15-2.

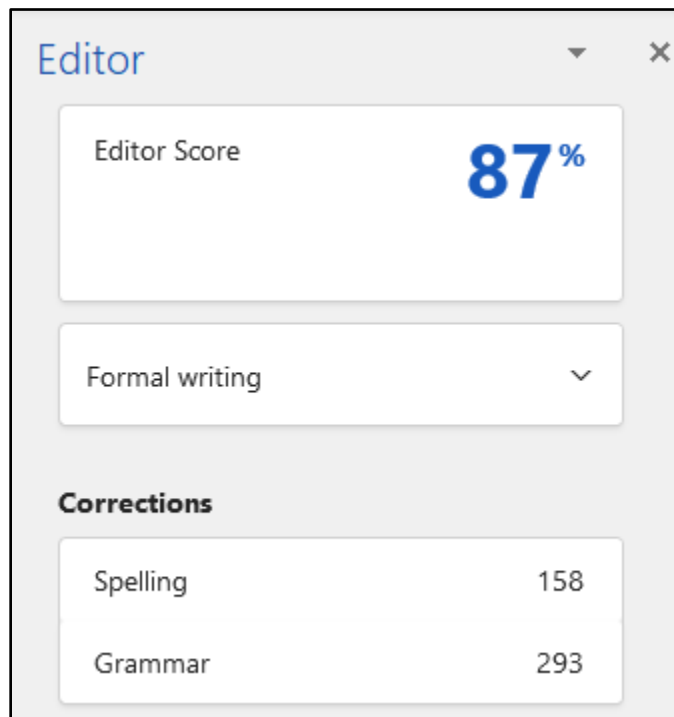


FIGURE 15-2

Once you click on Spelling above, it launches into a normal spell check within the pane as you would expect (see below).

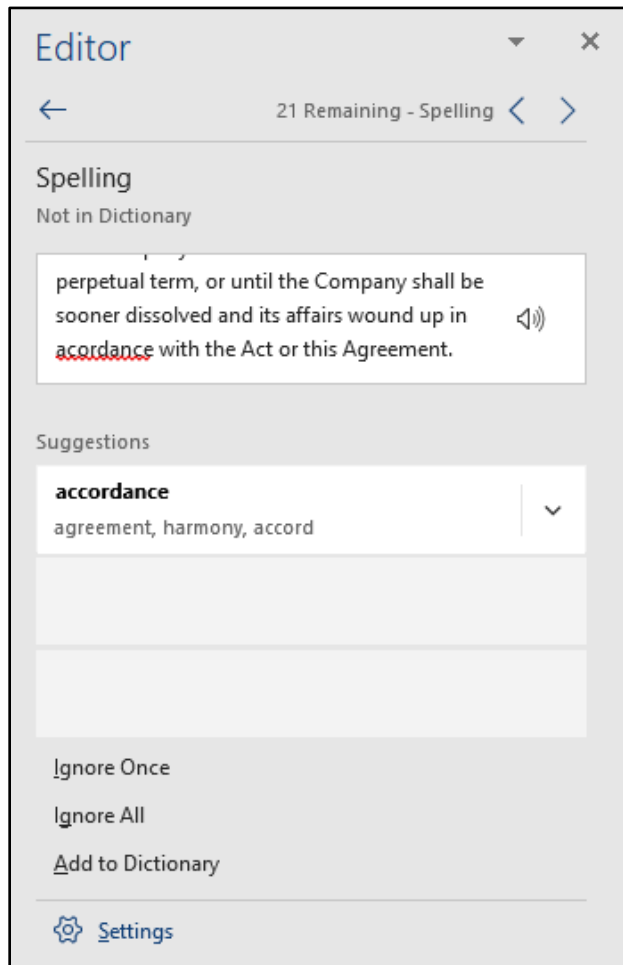


FIGURE 15-3

## Editing the Dictionary

When performing a spell check, it is easy to accidentally click **Add to Dictionary** when you meant to click **Ignore All**. If this happens, then you've just added a misspelled word to your dictionary which means that future occurrences of the same typo will not be flagged by Word's spell checker. In circumstances such as this, you'll want to edit your dictionary and remove the misspelled word from your dictionary. In order to do this, go to the **File menu ► Word Options/Options ► Proofing ► Custom Dictionaries...** button and you'll see the following:

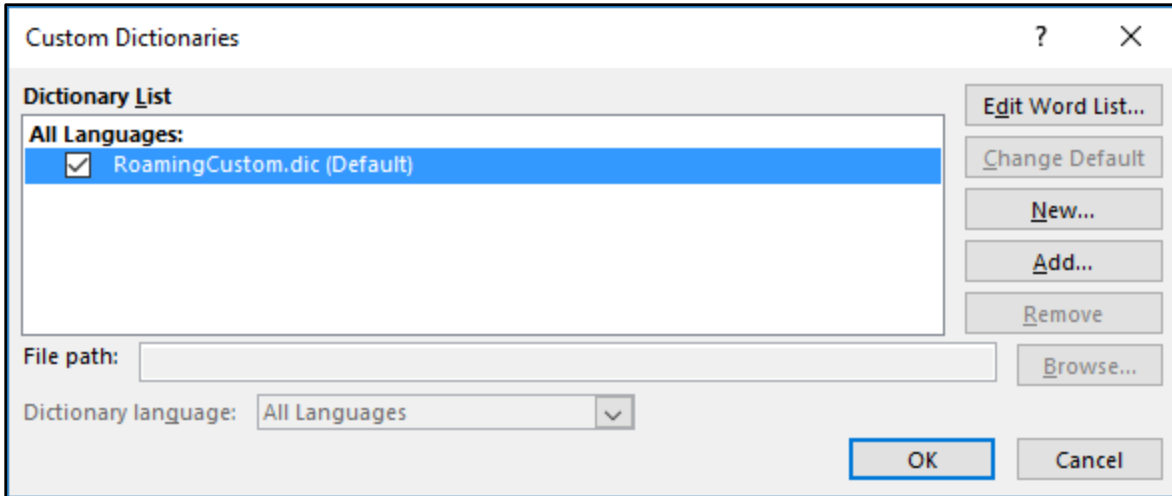


FIGURE 15-4

Click the **Edit Word List...** button and you'll see the dialog in Figure 15-5.

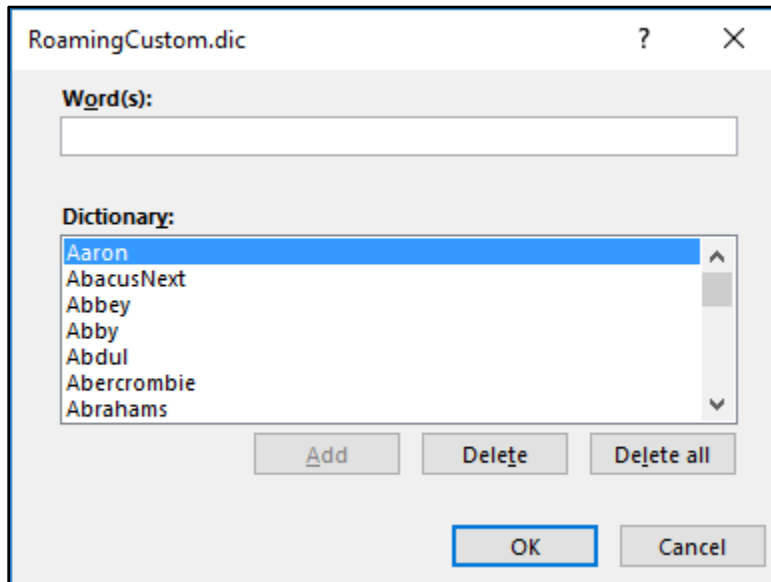


FIGURE 15-5

Locate the word you would like to remove, click on it and click the **Delete** button. Note that you can also add words to Word's dictionary in this manner.

## AutoCorrect

Word also uses AutoCorrect to automatically correct commonly misspelled words on the fly and with no intervention on your part.

### To Create an AutoCorrect Entry

Even though Word includes hundreds of commonly misspelled words in AutoCorrect, you might want to add a few of your own. To do this, follow these steps:

1. Click the **File** menu → **Options** → **Proofing** → **AutoCorrect Options** button. The following dialog will appear.

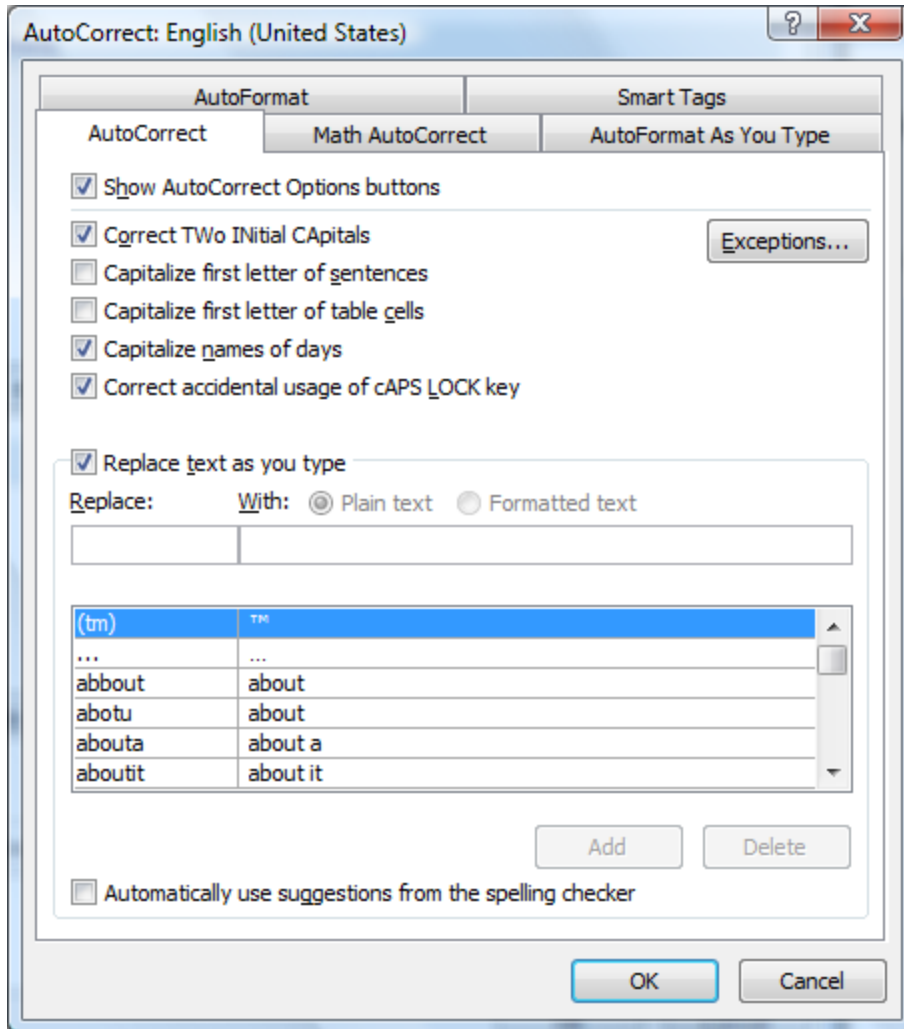


FIGURE 15-6

2. In the **Replace box**, type the word as you commonly misspell it. In the **With box**, type the correct spelling of the word.
3. Click **Add** and then hit **OK**.
4. Test it by typing the word as you commonly misspell it *followed by a space*. The keystrokes should be replaced by the AutoCorrect text.

### Legal Tip - Use AutoCorrect Proactively

Passively, AutoCorrect is very useful, but we recommend using it proactively. In other words, try creating AutoCorrect entries which automatically insert words or phrases which you frequently type and/or which are annoying to type. However, remember to use non-word acronyms for the "replace" word. An easy way to handle this is to add / in front of your "replace" words.

For example, below is an AutoCorrect entry which replaces "/aff" with "Affinity Consulting Group, LLC".

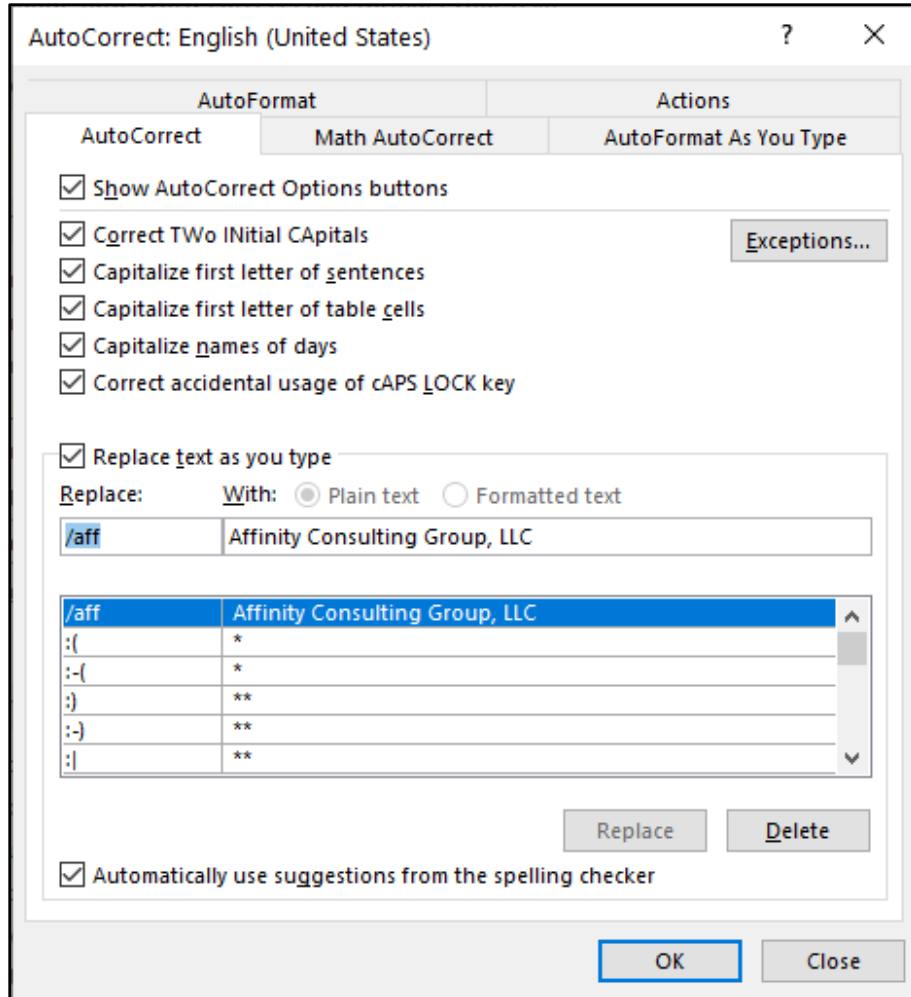


FIGURE 15-7

## AutoCorrect Smart Tags

The AutoCorrect Options button first appears as a small, blue box when you rest the mouse pointer near text that was automatically corrected, and changes to a button icon when you point to it.

For example, assume that an AutoCorrect entry of "/irc" converts into "Internal Revenue Code of 1986, as amended". The thin rectangle under the word "Internal," below, is the AutoCorrect Options button.

Internal Revenue Code of 1986, as amended

FIGURE 15-8

If you hover over the rectangle above, it changes into a button and presents you with the following options:

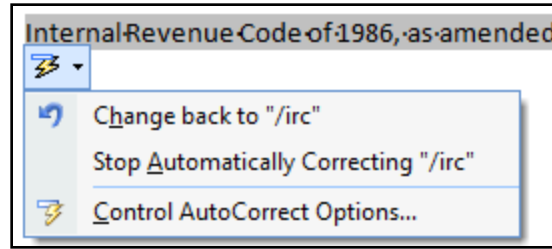


FIGURE 15-9

As you can see, the option to undo the auto-correction is included.

## Grammar Check

To run a spell check, in Word 13/16, click the **Review ribbon** → **Proofing group** → **Spelling & Grammar** (SK: **F7** key). In 2019/21/365, click the **Review ribbon** → **Proofing group** → **Editor** (SK: **F7** key). In Word 2013/16, you'll get a Spelling pane on the right side of the screen; and in Word 2019/21/365, you'll get an Editor pane on the right side.

The Editor pane is designed to give you more grammar and writing suggestions. If you have the Editor pane, an initial spell check will open a dialog like the one shown in Figure 15-10.

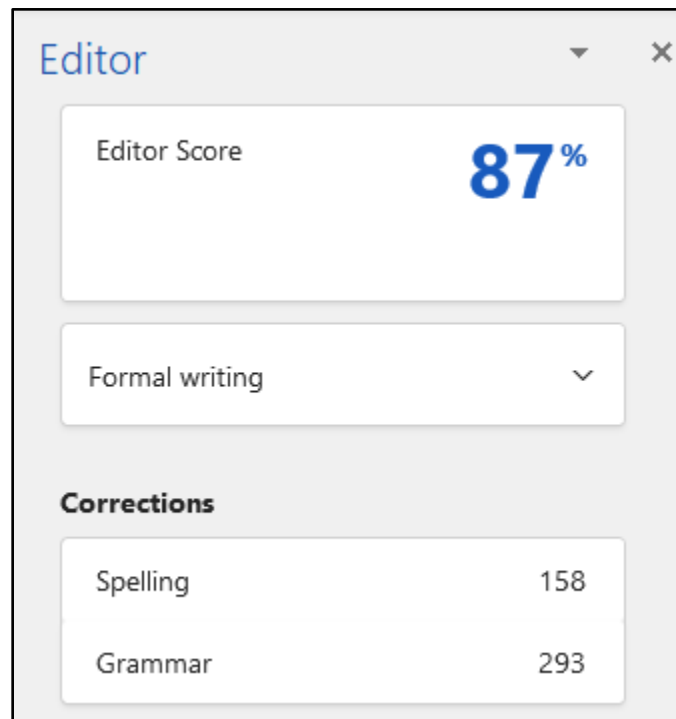
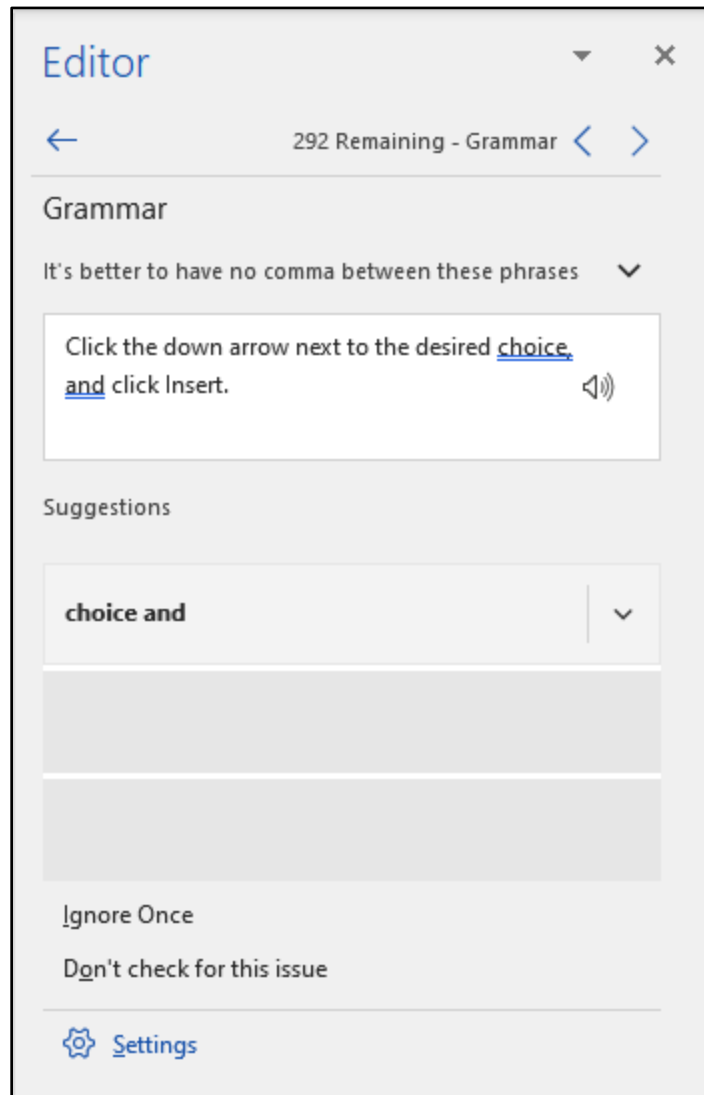


FIGURE 15-10

Once you click on Spelling above, it launches into a normal spell check within the pane as you would expect (see below).



## Thesaurus

To find a synonym for a word:

1. Either select the target word or simply put the cursor in the target word.
2. Click on the **Review ribbon** → **Proofing group** → **Thesaurus button** (SK: **Shift + F7**).
3. Click the down arrow next to the desired choice, and click **Insert**.
4. Word will automatically replace the word in the document.



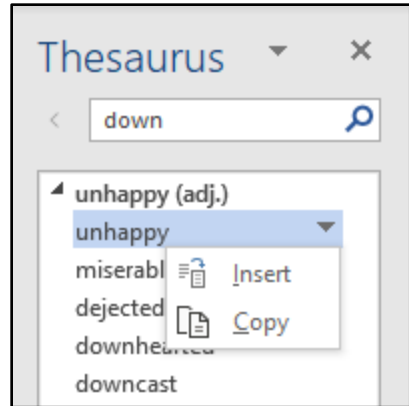


FIGURE 15-11

# CHAPTER 16

# FORMATTING PRINCIPLES

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## The Microsoft Word Approach to Formatting

Word controls formatting in three parts. Understanding the three parts is key to becoming a formatting expert. The three formatting components in Word documents are 1) font; 2) paragraph and 3) section.

### Font Formatting

Font formatting is formatting applied to individual characters. For example, you can make an individual letter or word Times New Roman 12 pt, bold, and underlined.

Font formatting is accessed from the **Home ribbon**, in the **Font group**. You can find additional font settings by click on the **Font launcher**.

Font attributes include:

- Font name (Arial, Times New Roman, etc.)
- Font style (regular, italic, bold, bold italic)
- Font size (measured in points)
- Font color
- Underline style
- Underline color
- Font effects (strikethrough, double strikethrough, superscript, subscript, shadow, outline, emboss, engrave, small caps, all caps, hidden)
- Character spacing (scale, spacing, position, kerning)
- Text effects (animations)
- Case (capitalization)

You apply font formatting by selecting text and choosing the formatting attributes you would like to apply.

### Paragraph Formatting

Anything followed by a hard return is considered a paragraph. (You unknowingly insert a hard return every time you hit the enter/return key on your keyboard). To see the hard returns, click on the **Home ribbon** → **Paragraph group** → **Show/Hide button** ¶ . Everywhere that someone hit the enter/return key, you'll see a ¶ in the document.

Paragraph formatting applies to the *entire* paragraph (as opposed to only a portion of the paragraph). For example, a paragraph can be left-aligned or centered, but it can't be both.

Font formatting is accessed from the **Home ribbon**, in the **Paragraph group**. You can find additional paragraph settings by click on the **Paragraph launcher**.

Paragraph formatting attributes include:


- Indents and spacing (alignment, outline level, indentation, spacing)
- Line and page breaks including widow/orphan control, keep lines together, keep with next, hyphenation, etc.
- Tabs
- Borders and shading
- Bullets and numbering

Because paragraph formatting is applied to the entire paragraph, you merely need to click in the paragraph before selecting the desired formatting. You do *not* need to select the entire paragraph. To apply paragraph formatting to multiple paragraphs at once, select at least part of each paragraph to be formatted.

## Section (Page) Formatting

Section formatting is often referred to as page formatting. It's formatting that doesn't apply to specific characters or paragraphs. Things like the page size, margins, headers, and footers are all section formatting.

If you need to change section formatting, you need to insert a section break into your document. Think of section breaks as invisible fences in your document (you can see them if you click on the **Home ribbon** → **Paragraph group** → **Show/Hide button** ¶) or if you switch to the Draft view by clicking on the **View ribbon** → **Views group** → **Draft button**. Once the fences are up, you can format the text between the fences differently and the applied formatting will not affect the other sections unless you tell Word to apply it to the whole document.

To insert a section break, click the **Layout ribbon** → **Page Setup group** → **Breaks button arrow**  **Breaks** ▾. Under **Section Breaks**, you can choose from **Next Page**, **Continuous**, **Even Page** or **Odd Page**. See Chapter 20 for more information about section breaks.

**NOTE:** If you do not insert section breaks into a document, then the entire document is considered one section. As a result, many people refer to "section formatting" as "document formatting" since the formatting applies to the entire document if there are no section breaks. However, you can make as many additional sections as you would like.

Section formatting attributes include:

- Columns
- Margins
- Paper size
- Page orientation (portrait or landscape)
- Paper source (set which paper tray your printer pulls from)
- Line numbering

- Headers and footers

## Reveal Formatting

In order to see what formatting is applied to text in your document, place your cursor in the text and hit **Shift + F1** which will open the **Reveal Formatting pane** on the right side of your screen. As you will see, it breaks down the formatting into Font, Paragraph and Section, explains what is being applied and allows you to make adjustments. If you are working in the cloud, **Shift + F1** may not open the **Reveal Formatting pane**. In that case, open your **Styles pane (Home ribbon → Styles launcher OR Alt+Ctrl+Shift+S) → click on Style Inspector button (A) → click the Reveal Formatting button (A)**.

## Format Painter

You can copy and paste formatting within a document using the format painter. This is particularly useful when you have some rogue paragraphs which are formatted incorrectly.

### Using the Format Painter

To take advantage of the format painter:

1. Click in the text which is formatted the way you would like (don't select anything). In the example below, paragraph 4 is formatted correctly, and paragraph 3 is not. Click somewhere in the middle of paragraph 4. Do not select anything.

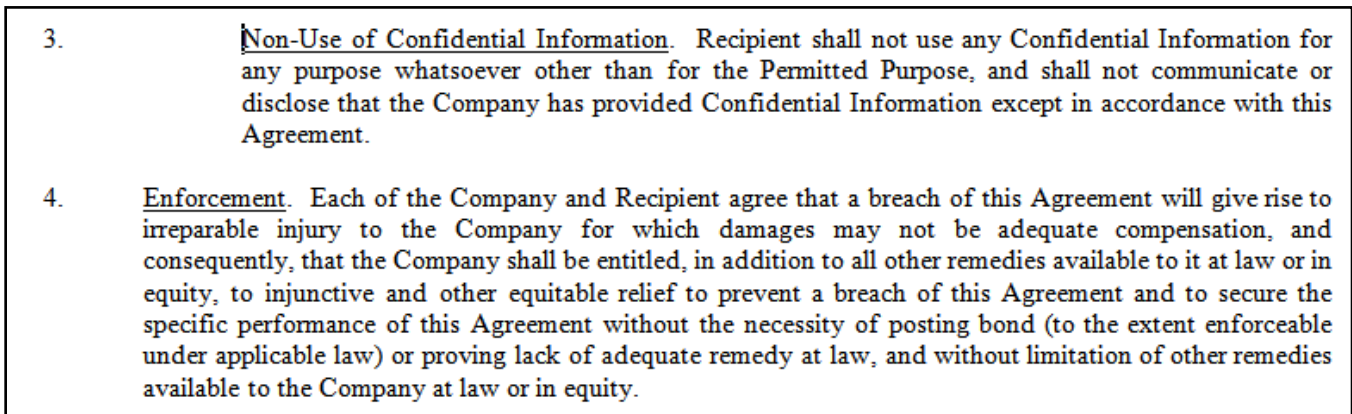



FIGURE 16-1

2. Click the **Home ribbon → Clipboard group → single click the Format Painter button** . You'll notice that your mouse pointer turns into a brush.
3. Then, select the text to be formatted.

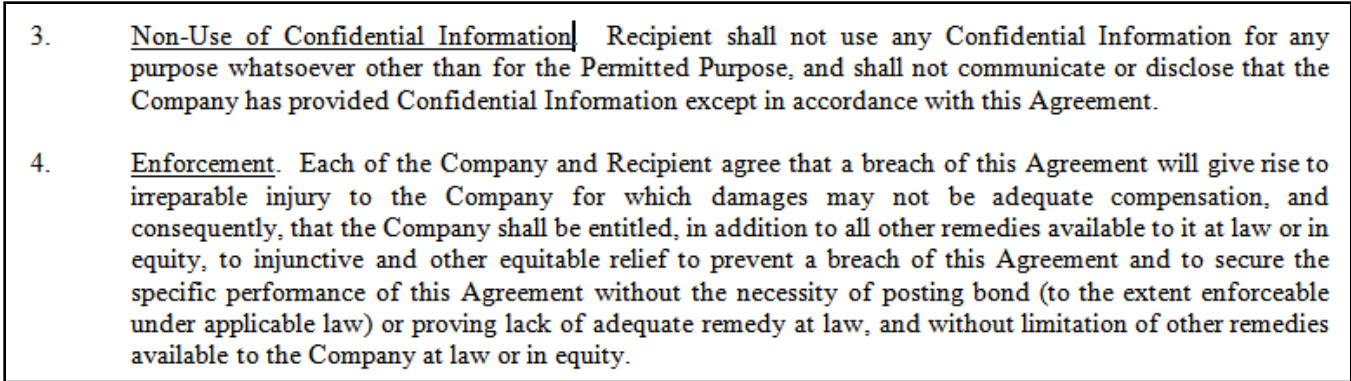


FIGURE 16-2

To apply the formatting to another area, you'll need to click on the **Format Painter button** again.

## Using the Format Painter on Multiple Paragraphs

If you want to turn on the Format Painter and keep it on until you're done selecting multiple sections of text, double-click the **Format Painter button**. When you're done, single click the button and it will turn off again.

## Remove All Formatting

You can strip paragraph and font format off of text to take it back to the document's defaults (see page 109).

- Select the text → click **Home ribbon** → **Font group** → **Clear Formatting button** .
- Select the text → click **Home ribbon** → **Styles launcher** → **Clear All** in the **Style dialog**.



FIGURE 16-3

If you have applied any styles (see Chapter 22), they will be unapplied as well.

## Strip Font Formatting

To strip off any manually applied font formatting attributes, select the text → **Ctrl + Spacebar**. Any paragraph formatting will remain. If you applied font formatting using styles (see Chapter 22), that formatting will remain.

## Strip Paragraph Formatting

To strip off any manually applied paragraph formatting attributes, select the text → **Ctrl + Q**. Any font formatting will remain. If you applied paragraph formatting using styles (see Chapter 22), that formatting will remain.

# CHAPTER 17

## FONT FORMATTING

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

### Applying Font Formatting

As discussed in Chapter 16, font formatting is applied to individual characters. You either must select the formatting you want before typing or select the characters to be formatted, then select the desired formatting.

#### Font Group on the Home Ribbon

Many common font formatting attributes can be quickly adjusted by click on the desired attribute in the **Home ribbon** → **Font group**.

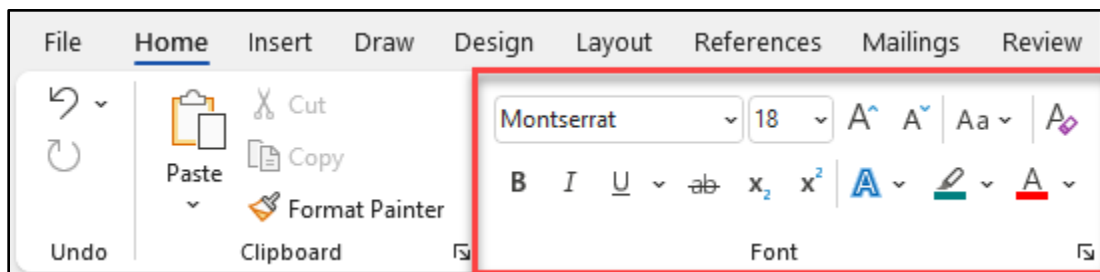


FIGURE 17-1

#### Font Dialog

The font formatting attributes found on the ribbon and more advanced font formatting settings can be found the **Font dialog**. To open the font dialog, click on the **Font launcher**, right-click and select **Font**, or use keyboard shortcut **Ctrl+D**.

This is where you'll find the settings for all caps and small caps.

## Lower Case, Upper Case, and More

You can format text to appear as though it was typed in all caps by checking the box on the **Font dialog** (see above).

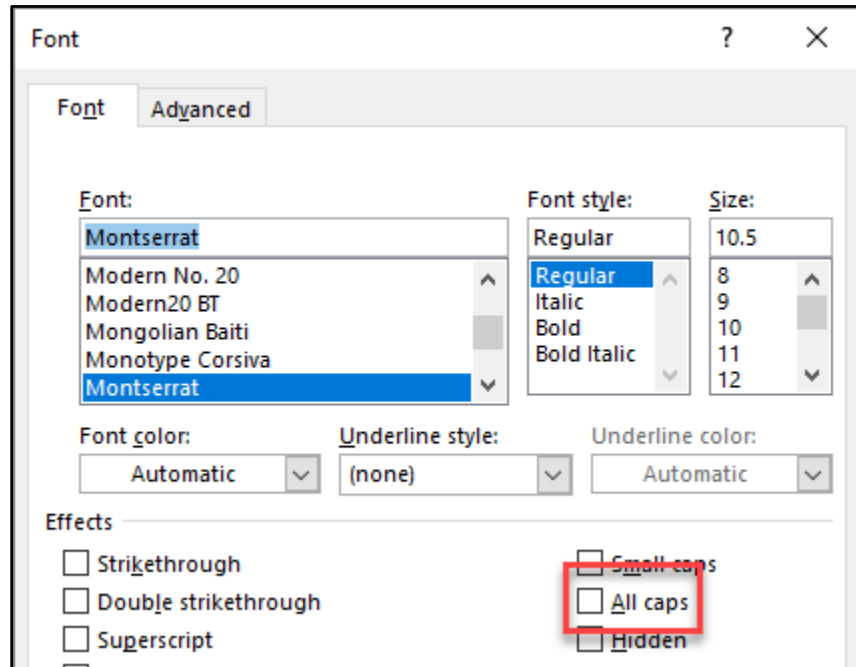


FIGURE 17-2

This does not, however, change Word's "record" of the character typed. If you cross reference this text or format it as a heading, it will appear as originally typed. Sometimes this is ideal, other times, it's not what you want.

You can also change the Word "record" of the character typed by using the **Home ribbon** → **Font group** → **Change Case button** Aa ▾. Here, you can toggle the caps, switch to all lower case or upper, or switch to sentence or title case.

## Stretching Title Spacing

If you need additional space between the characters in a heading, you don't need to use spaces between the letters. Instead, you can change the font formatting to expand the spacing as needed.

From the **Font dialog** (see above), click the **Advanced tab** ➔ under the **Spacing drop down**, choose **Expanded** and increase the point size to your liking ➔ **OK**. The following screenshot settings produce the text below:

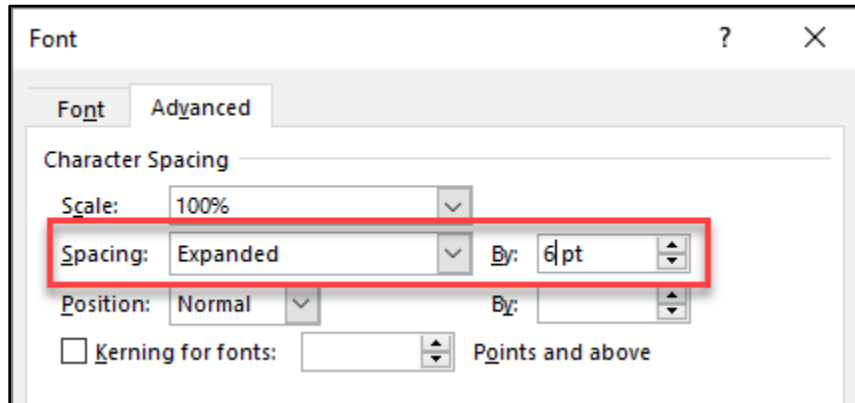


FIGURE 17-3

**M O T I O N   F O R   S U M M A R Y   J U D G M E N T**

## Hidden Text

Text can be formatted as "hidden" in the **Font dialog box**. Hidden text doesn't print, but it is visible to anyone who opens the Word document that has changed their settings to show hidden text and has turned on their paragraph marks. There is no need to use hidden text in the majority of documents.

To see hidden text:

1. Click on the **File menu** ➔ **Options** ➔ **Display** ➔ check **Hidden text**.

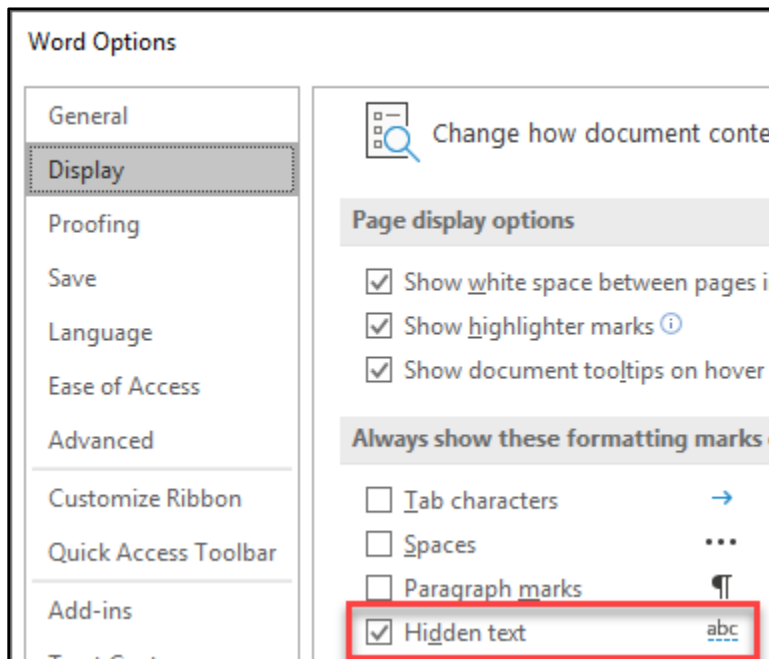


FIGURE 17-4

2. Click the **Home ribbon** ➔ **Paragraph group** ➔ **Show/Hide button** ¶.



Hidden text will appear with a dotted line under it.

**WARNING:** Do not use hidden text in documents you're negotiating or emailing to opposing counsel unless you absolutely remember to delete it before sending the document back to the other side.

## Symbols

There are a number of legal symbols which are available in Word. These should be made readily available so they can be produced quickly through keystrokes (or the toolbar if you prefer using a mouse).

### Inserting Symbols

Click the **Insert ribbon** → **Symbols group** → **Symbol button** → **More symbols** → Click the font and symbol you want → click the **Insert button**.

### Legal Tip - Symbols Used in Legal Documents

Some legal symbols already have shortcut keys assigned. Below is a list of commonly used legal symbols and their default keystrokes.

© .....	Ctrl + Alt + C
® .....	Ctrl + Alt + R
™ .....	Ctrl + Alt + T
.....	Ctrl + Alt + .
° .....	unassigned
² .....	Alt + 0178 (with Num Lock on)
§ .....	Alt + 21 (with Num Lock on)
¶ .....	Alt + 20 (with Num Lock on)

### Assigning Your Own Shortcut Keys to Symbols

To create easier shortcut keys to these symbols, or others:

1. Click **Insert ribbon** → **Symbols group** → **Symbol button** → **More Symbols**.
2. Select (normal text) or any other font in the list.
3. Click once on the symbol you for which you want to assign a shortcut key (so it is highlighted).
4. Click on the **Shortcut Key... button**.
5. Press the new shortcut keystrokes to assign to the symbol. If those keys are already assigned to another symbol or function, you should assign different keystrokes. We recommend **Ctrl + Alt + S** for the § symbol, and **Ctrl + Alt + P** for the ¶ symbol.
6. Click **Assign** to cement the keystroke assignment.
7. Click **Close** to close the dialog.
8. Close the Symbol dialog by clicking **Close**.
9. Test the new keystroke in your document.

## Non-Breaking Spaces and Hyphens

If you want to keep characters or words together so they won't be separated by a natural line break, use a non-breaking space. To insert a non-breaking space, click on the **Insert ribbon** → **Symbol** → **More Symbols...** → **Special Characters tab** → **Nonbreaking Space** → **Insert** → **Close** (SK: **Ctrl + Shift + Spacebar**). You can tell whether it worked by clicking the **Home ribbon** → **Paragraph group** → **Show/Hide button ¶**. Non-breaking spaces appear as a degree symbol (°) between the words rather than a dot (·), which is what a regular space produces.

To insert a non-breaking hyphen, click on the **Insert ribbon** → **Symbol** → **More Symbols...** → **Special Characters tab** → **Nonbreaking Hyphen** → **Insert** → **Close** (SK: **Ctrl + Shift + -**).

## "Printing" Problem Actually Related to Font Selection

### The Problem

Many users complain that printing the same document on different printers sometimes results in different page breaks and overall layout. This issue is most often caused by documents which use **printer** fonts rather than **TrueType** or **OpenType** fonts.

### TrueType, OpenType and Printer Fonts

The scalable fonts that are incorporated into Windows are called TrueType and OpenType fonts. Since TrueType and OpenType fonts are integrated with Windows, they will look the same regardless of which printer you use. Printer fonts, on the other hand, are printer-specific. Therefore, printing a document which uses Printer fonts on different printers will often result in different page breaks, layout, etc.

In older versions of Word, when you clicked the font drop-down, you could see an icon adjacent to the font names which identified what type of font you were looking at. The screen shot below shows a font list with a mix of TrueType and Printer fonts. The printer fonts were designated with the printer icon.

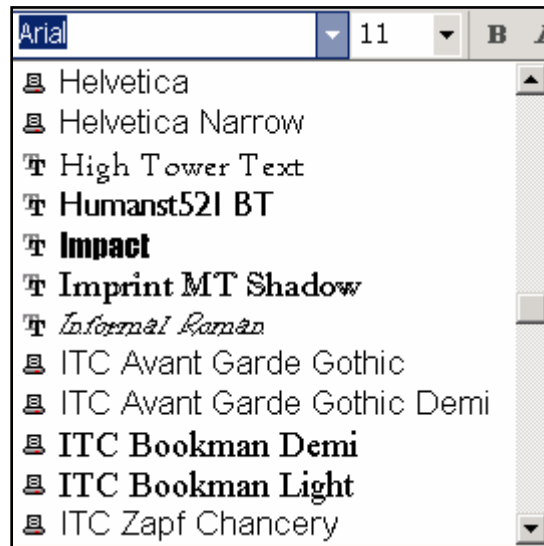


FIGURE 17-5

However, in newer versions of Word, you can't tell what type of font is in your list because the icons are no longer displayed. The general rule is that if the font identified in the font window of

the home ribbon doesn't appear in your drop-down list of fonts, then you need to change to a font that *is* listed in the drop-down. For example, when I click into the text in Figure 21-14 below, you can see that it's identified as a font called **CG Times**.

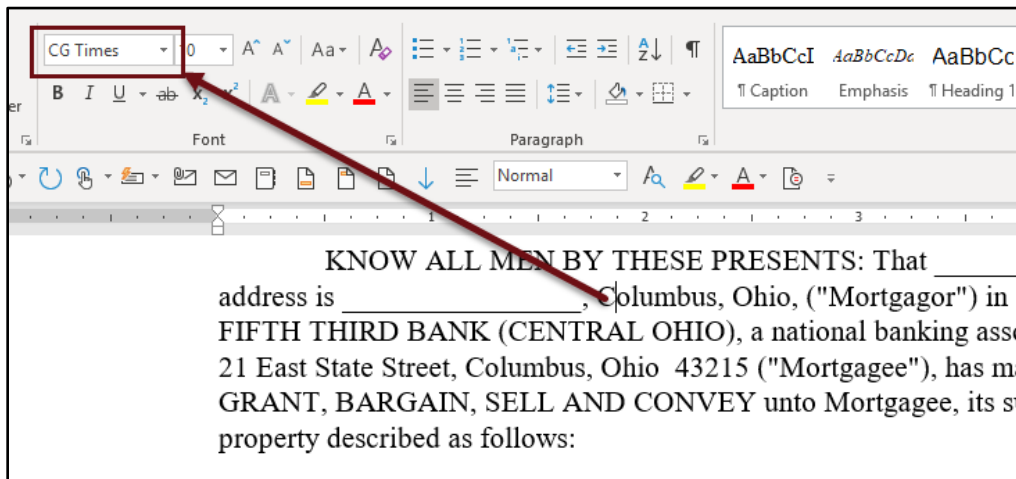


FIGURE 17-6

However, when I click the drop-down listing of fonts in Figure 21-15, you can see that CG Times is not listed. This is a dead giveaway that the font CG Times is a printer font and not installed on my PC. As a result, when I change from one printer to another with this document, I'm likely to get different page breaks and layout each time I switch printers even if I've changed nothing about the document. The solution is to fix the default for your document so that it is a font your computer recognizes (i.e., it appears in the list of fonts in Word which you click the drop-down).

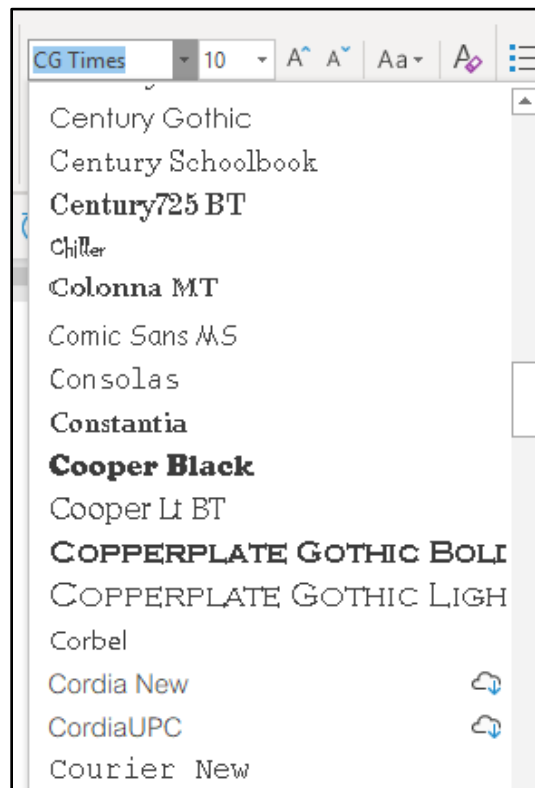


FIGURE 17-7

# CHAPTER 18

# PARAGRAPH FORMATTING

# FUNDAMENTALS

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

## Applying Paragraph Formatting

As discussed in Chapter 16, paragraph formatting is applied to entire paragraph. Click in a paragraph to apply paragraph formatting to it or select several paragraphs at once before applying the formatting.

## Paragraph Group of the Home Ribbon

Many common paragraph formatting attributes can be controlled easily from the **Home ribbon** → **Paragraph group**.

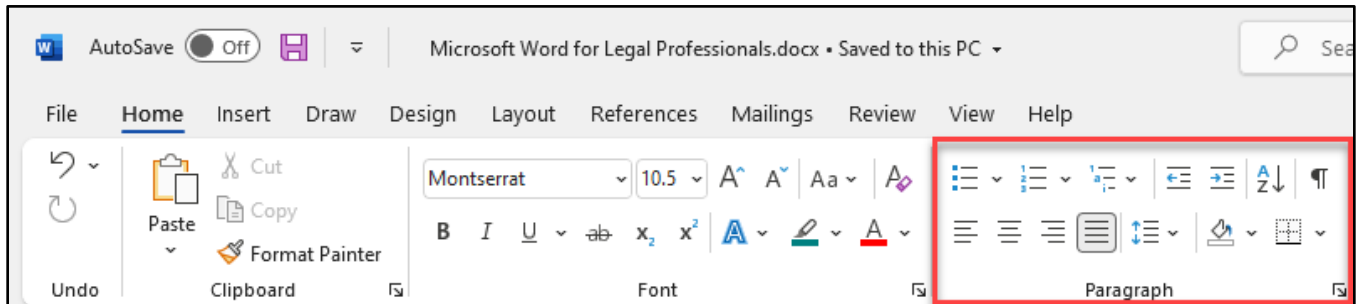


FIGURE 18-1

## Paragraph Dialog

The paragraph formatting attributes found on the ribbon and more advanced paragraph formatting settings can be found the **Paragraph dialog**. To open the font dialog, click on the **Paragraph launcher** or right-click and select **Paragraph**.

## What Happens when Paragraph Marks Are Deleted

Paragraph formatting is stored in the ¶ symbol at the end of each paragraph. To view these symbols, click the **Home ribbon** → **Paragraph group** → **Show/Hide ¶ button** ¶.

If you delete a paragraph mark while editing a document, the paragraph formatting from the paragraph above (the one you deleted the paragraph mark for) will apply itself to the one below. This is a little counter intuitive.

## Paragraph Alignment

Paragraphs can be left aligned, right aligned, centered, or fully justified. Alignment can be changed using the buttons on the **Home ribbon**, in the **Paragraph group**; from the **Paragraph dialog**, or by using keyboard shortcuts.

- ☰ **Ctrl + L** Left Aligned
- ☰ **Ctrl + R** Right Aligned
- ☰ **Ctrl + E** Centered
- ☰ **Ctrl + J** Fully Justified

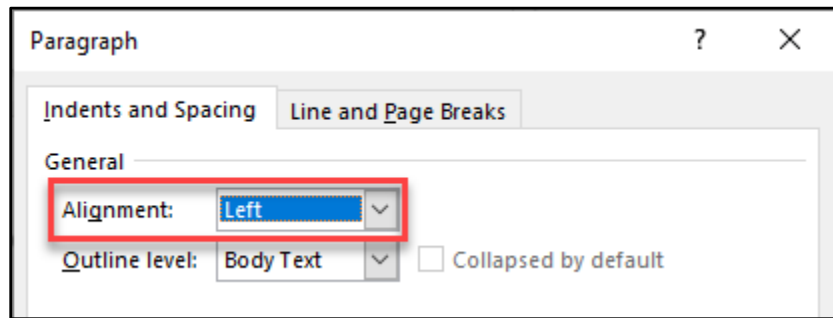
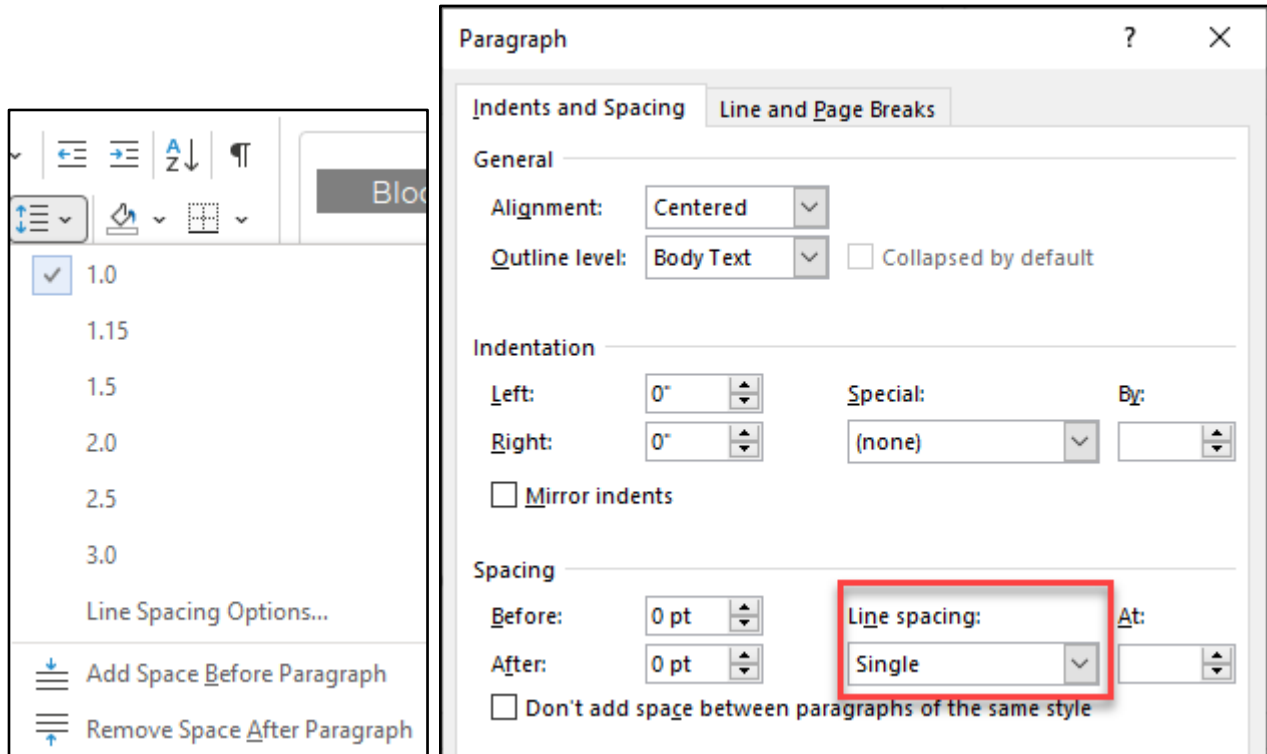


FIGURE 18-2

## Line Spacing

Line spacing is the amount of space between lines of text. Most legal documents use either single spacing or double spacing. Line spacing can be changed using the Line Spacing button on the Home ribbon, from the Paragraph dialog, or by using keyboard shortcuts.

- Ctrl + 1          Single spaced
- Ctrl + 2          Double spaced
- Ctrl + 5          1.5 spaced



FIGURES 18-3 AND 18-4

## Spacing Between Paragraphs

Most single-spaced documents are formatted with a blank line of space between paragraphs. This spacing can be accomplished by hitting **Enter** twice after each paragraph. However, this makes the formatting harder to manage. If, for example, you later decide to double space your paragraphs, you'll need to remove the unnecessary paragraph marks.

A better solution is to let Word control spacing between paragraphs from the **Paragraph dialog**.

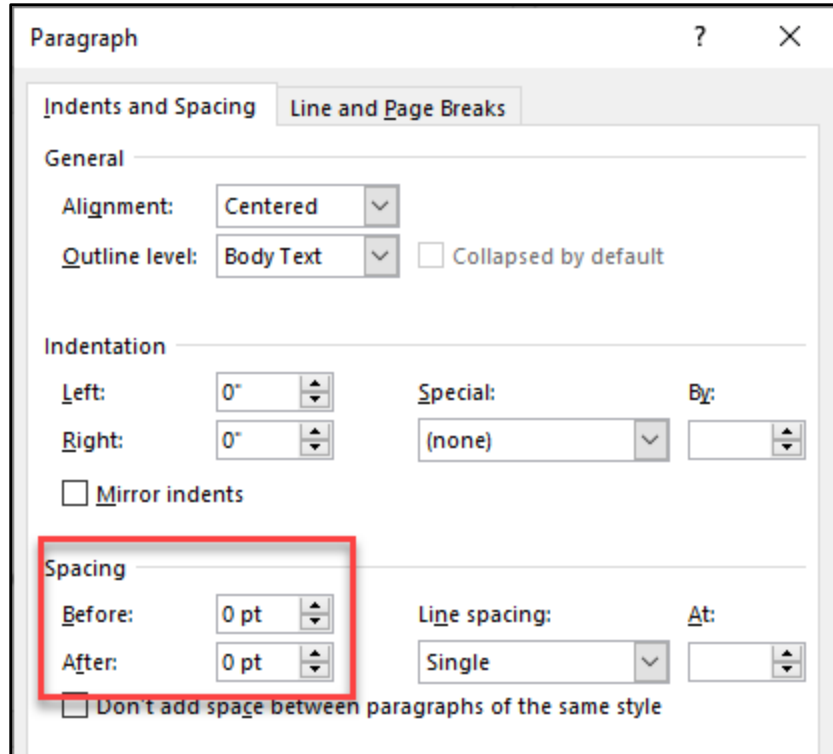


FIGURE 18-5

## Spacing Measurements

Space between paragraphs is measured in points. To add a full blank line between paragraphs, make the number of points match your font size. For example, if your document is formatted with Time New Roman 12 pt. add either 12 pts. of spacing before or after your paragraphs.

Adding spacing after each paragraph has the same end effect as hitting return a second time after each paragraph. Alternatively, you could choose to add space before each paragraph. For the average single spaced legal document, the difference is immaterial.

## Holding Lines and/or Paragraphs Together

If you have text that you don't fall at the bottom of a page (such as a heading), you can glue paragraphs to each other to ensure that they always appear on the same page. This eliminates the need to use hard returns to force the heading onto the next page.

You can also prevent a paragraph from breaking across multiple pages. If, for example, you have lengthy headings, you may want to prevent them from breaking across pages.

## Keeping Paragraphs on the Same Page

The **Keep with next** formatting attribute prevents a paragraph from falling at the bottom of a page by gluing it to the paragraph beneath it. This setting is *only* applied to the top paragraph (typically a heading). If you apply the formatting setting to the bottom paragraph, it will glue the bottom paragraph to the paragraph beneath it.

1. Right-click on the paragraph you want to attach to a subsequent paragraph and choose **Paragraph** from the dialog that appears. Do *not* select the two paragraphs you want to hold together. In the screen shot below, right-click on the paragraph entitled "Loans". You

would *not* select both paragraphs 3.3 and (a) because that would result in gluing together more paragraphs than you intend.

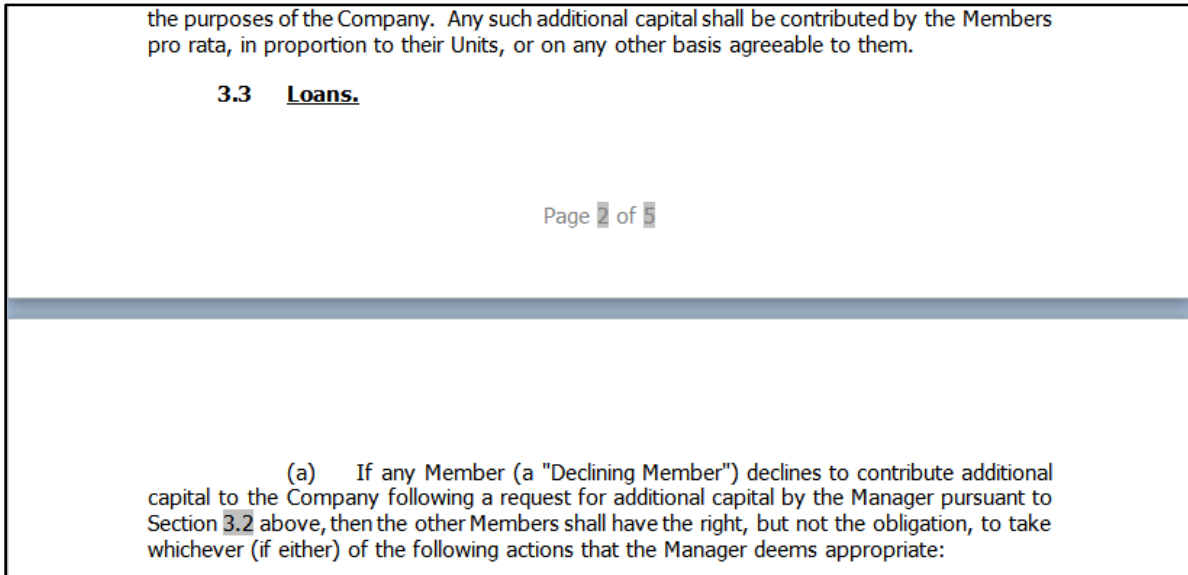


FIGURE 18-6

2. Once you're in the **Paragraph dialog**, click the **Line and Page Breaks** tab.
3. Check the **Keep with next box** and click **OK**. Leave the **Orphan/Widow box** checked.

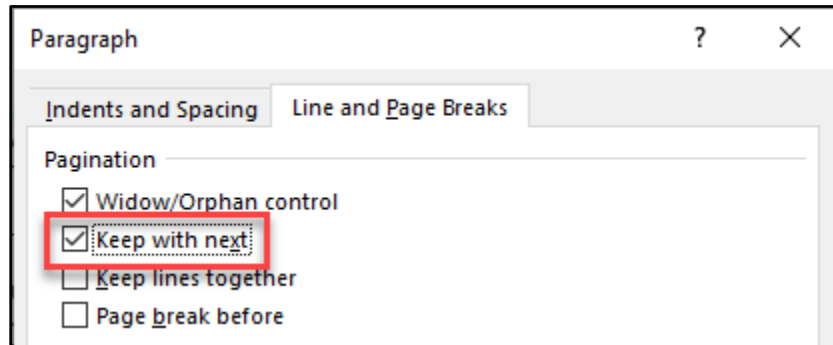


FIGURE 18-7



## Keeping a Paragraph All on One Page

The **Keep lines together** formatting attribute prevents a paragraph from breaking across multiple pages.

For example, in the screen shot below, I don't necessarily want to glue paragraph (e) to paragraph (f); but I want to keep (e) together on the same page since it's only 3½ lines.

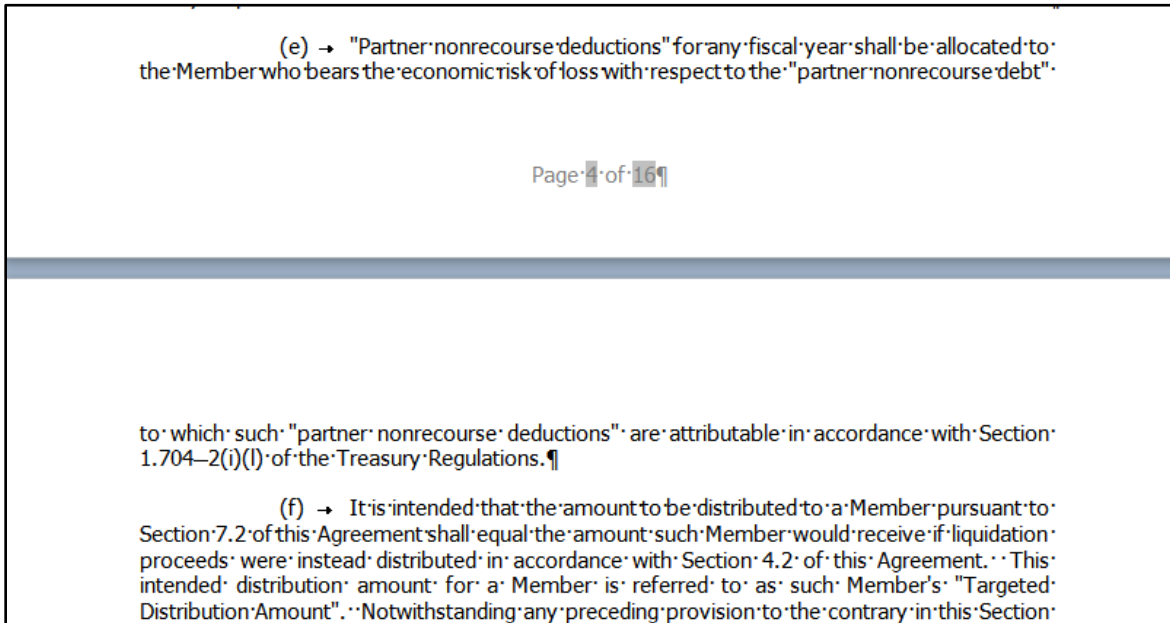


FIGURE 18-8

1. Right-click on the paragraph and choose **Paragraph**.
2. Check the **Keep lines together box**. Leave the **Orphan/Widow box** checked.

## Notes About Gluing Paragraphs Together

There are a couple of things to keep in mind about these features:

- If you think about where you *wouldn't* want page breaks to occur in your documents as you draft them, you could proactively apply paragraph glue to them so that the issue would never arise.
- Word's default formatting for footnotes allows very long footnotes to be broken up across multiple pages. If you work with a lot of footnotes, you may have seen this behavior before. In our experience, most legal users would prefer that all text of a footnote remains on the page it is inserted on. The paragraph formatting characteristic missing from footnotes by default is **Keep lines together**. If you have a footnote that has decided to spread itself across multiple pages, right-click the footnote and apply Keep lines together (which will pull the entirety of the footnote back onto the page it was referenced). You could also update the style called Footnote Text to include that characteristic, but we'll cover that later when we get to the discussions on Styles (start with Chapter 22).
- Keep with next and keep lines together can both be used in the same paragraph. For example, see Figure 18-9 below. You wouldn't want a page break to occur anywhere in



## Tabs

Tab stops determine where the cursor moves to when you hit the tab key. By default, they are set to every half inch. So, unless you specify otherwise, every time you hit the **Tab key**, the cursor will advance to the next half-inch mark on the Horizontal Ruler.

You can easily see tab stops that you add to a paragraph by showing the Ruler (see page 114).

### Changing the Default Tab Stops

While Word sets default tab stops to every half inch, you can change the default to something else:

1. Click the **Home ribbon** → **Paragraph launcher** (or right-click anywhere in the document and choose Paragraph) → **Tabs... button** in the dialog.
2. Change the **Default tab stops dropdown** setting to the desired increment (perhaps every one inch).
3. Click **OK** when finished.

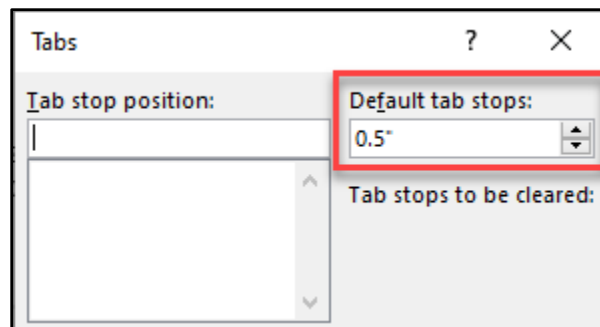


FIGURE 18-11

### Tab Types

Word has five types of tab stops: Left, Center, Right, Decimal and Bar. The difference is in how the text is aligned after each tab.

- **Left tab (L):** Text entered after this tab is left aligned.
- **Center tab (C):** Text entered after this tab is centered.
- **Right tab (R):** Text entered after this tab is right aligned.
- **Decimal tab (D):** Numbers entered after this tab are aligned along their decimal point (or just after the last numeral if there is no decimal point).
- **Bar tab (B):** Inserts a vertical line into the document.

See below for a demonstration of how each tab stop changes the alignment of the text.

Left	Bar	Center	Right	Decimal
<b>Facility</b>		<b>Physician</b>	<b>Patient</b>	<b>Bill Amount</b>
Riverside Hospital		Dr. Doolittle	Elvis Presley	\$587.21
Grant Hospital		Dr. Pain	Orville Reddenbocker	\$6,110.60
Park Medical Center		Dr. Welby	Wilt Chamberlain	\$12,662.30

FIGURE 18-12

As you can see above, the tab stops line up the text beneath them by their name (right, left, center, decimal). The bar tabs are not really tab stops; they merely insert vertical lines wherever they're placed.

## Setting Custom Tab Stops

You can add custom tab stops to individual paragraphs by using the tab selector box or the Tabs dialog box. When you manually insert a tab stop, it nullifies all of the default tab stops to the left of the manually inserted tab stop.

### Using the Tab Selector Box

You can use the Tab Selector box to insert custom tab stops if your Ruler is showing (see page 114).

1. Click the **Tab Selector Box** to cycle through the different types of tabs until you have the one you need.

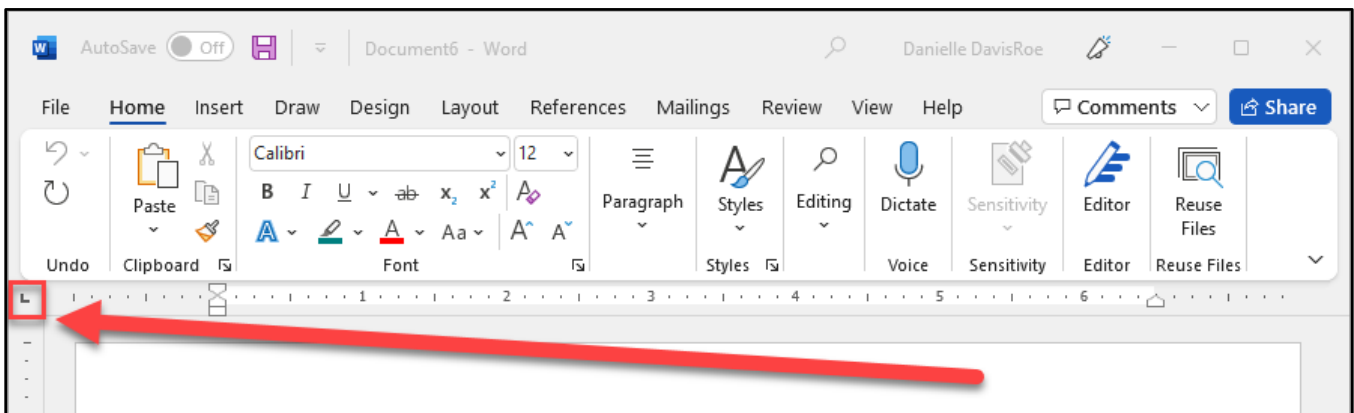


FIGURE 18-13

2. Click on the **Horizontal Ruler** where you want to set the tab stop.

### Using the Tabs Dialog

You can also use the Tabs dialog to set tab stops.

1. Right-click in the paragraph at issue.
2. Click on **Paragraph**.
3. Click on the **Tabs...** button.

4. Enter your tab settings into the dialog and click the **Set button** after you enter each one.
5. Click **OK**.

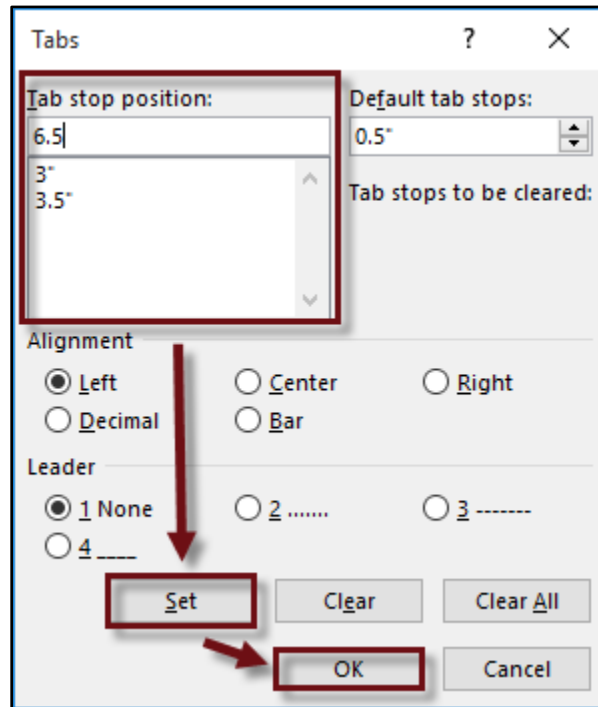


FIGURE 18-14

## Removing Custom Tab Stops

You can remove custom tab stops from individual paragraphs by using the tab selector box or the Tabs dialog box. If you want to remove all custom tabs from a paragraph in one swell swoop, you can do so from the Tabs dialog box.

### Clearing Specific Tabs

To remove custom tab stops using the Ruler, drag and drop the undesired tabs from the **Horizontal Ruler** into the document area.

To remove custom tab stops using the Tabs dialog:

1. Click in or select the paragraphs at issue.
2. Click the **Home ribbon** ➔ **Paragraph launcher** ➔ **Tabs... button**.
3. Select the tab stop to be removed.
4. Click on the **Clear button**.

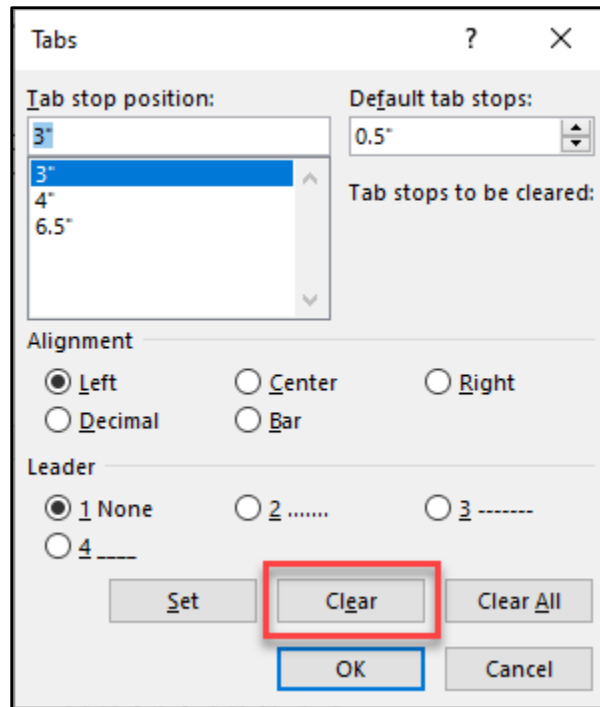


FIGURE 18-15

### Clear All Tabs

To clear all tabs from a paragraph:

1. Click in or select the paragraphs at issue.
2. Click the **Home ribbon** ► **Paragraph launcher** ► **Tabs...** button.
3. Click the **Clear All** button.

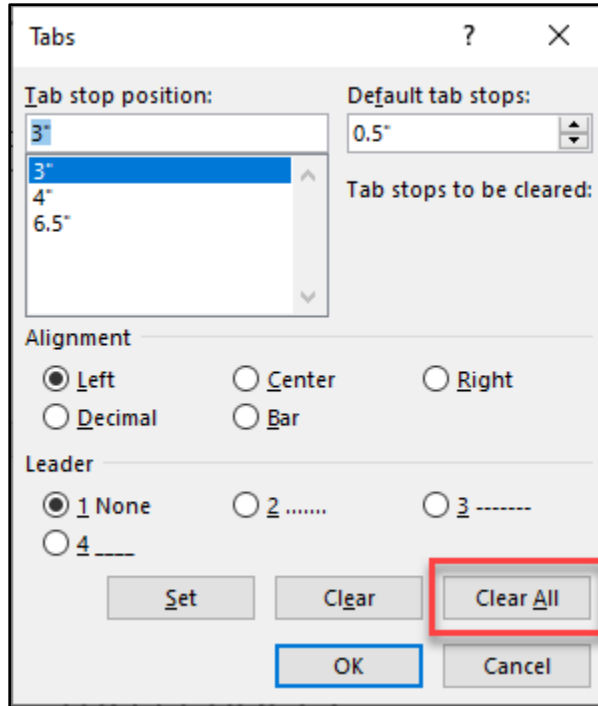


FIGURE 18-16

## Tab Leaders

Tab Leaders fill the empty space before tab stops with dots, dashes or underscores. They most commonly precede the page numbers in tables of contents. Tab Leaders are set up from the Tabs dialog box. Change the Leader from 1 None to the desired Leader.

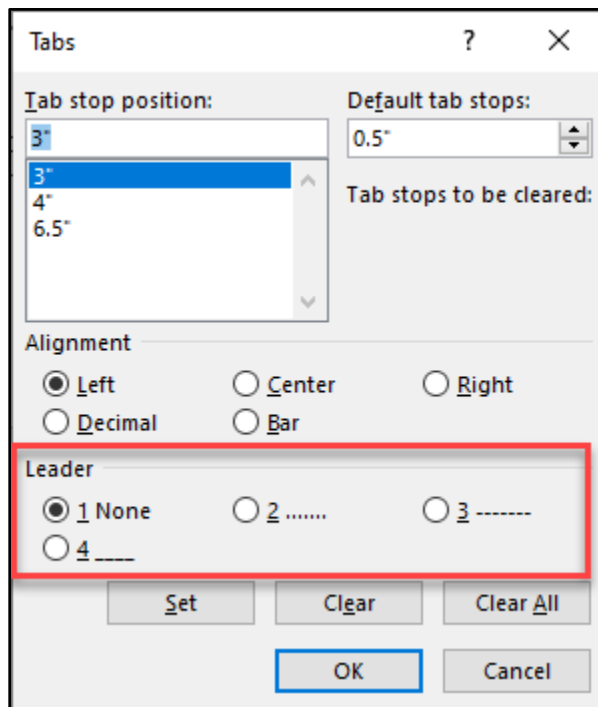


FIGURE 18-17

## Indents

Indents are used to control the distance between the text in a given paragraph and the left and right margins.

### Indent Types

There are four types of indents: left, right, first line, and hanging indents.

#### First line Indent

This paragraph is an example of a first line indent. The first line of the paragraph, and the first line only, is indented at one-half inch. Instead of starting each paragraph by hitting the tab key, use a first line indent.

#### Hanging Indent

This paragraph is an example of a hanging indent. The first line of the paragraph is not indented, but the second and remaining lines are. Hanging indents are most commonly used in numbered lists or bullet point lists.

Another example:

1. This is another example of a hanging indent. Hanging indents are almost exclusively used with numbers and bullet points.

#### Left Indent

This paragraph is an example of a left indent. *All* of the lines in the paragraph are set away from the left margin. This is very commonly used in outlines, pleadings, or case-law summaries.

#### Right Indent

This paragraph is an example of a right indent. *All* of the lines in the paragraph are set away from the right margin.

### Combining Indent Types

First line indents and hanging indents cannot be combined with each other, but they can be combined with left and right indents. Left and right indents can also be combined into a dual indent. Dual indents are most commonly used for block quotes. First line or hanging indents combined with left indents are most commonly used for numbered paragraphs.

## Setting Indents

You can set indents using the Paragraph dialog box, the Horizontal Ruler (see page 114 for instructions on turning on the ruler), or keyboard shortcuts.

### Using the Paragraph Dialog Box

To set indents using the Paragraph dialog box:

1. Click in or select the paragraphs at issue.
2. Click the **Home ribbon** ► **Paragraph launcher Indents and Spacing tab**.
3. Select the desired **Indentation** and, under **Special**, specify if you want the first line of the paragraph to have a hanging indent, a first-line indent or neither (none).



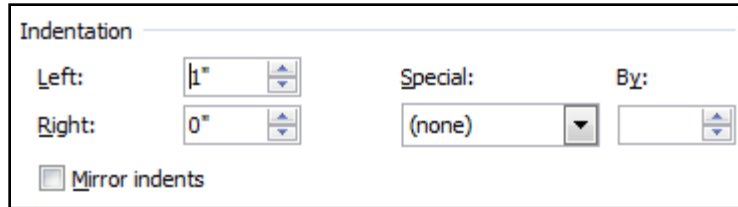


FIGURE 18-18

### Using the Horizontal Ruler

On the Horizontal Ruler, the triangles and the box are indent markers and each represents a different type of indent:

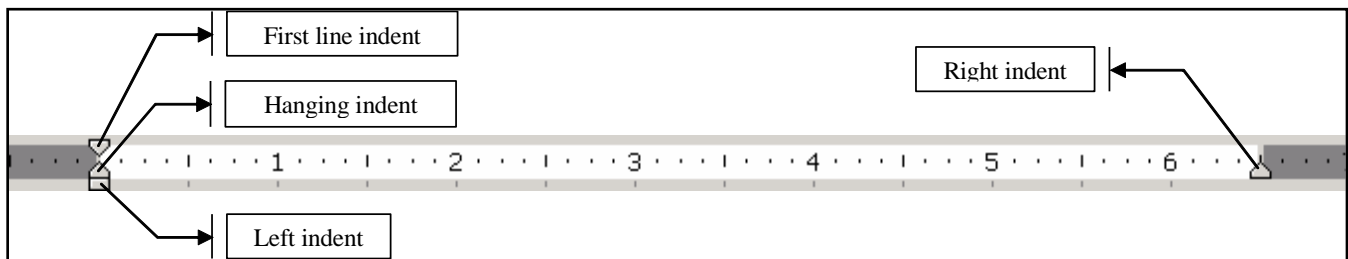


FIGURE 18-19

To indent using the ruler:

1. Click in or select the paragraphs at issue.
2. Drag the indent marker(s) to the desired position.

### Using the Tab Selector Button

You can also set the first line or hanging indent using the **Tab Selector button** (see page 166). Click the alignment box until it looks like this ▽ (first line indent) or like this ▴ (hanging indent) and then you can click on the **Horizontal Ruler**.

### Using Keystrokes

Click anywhere inside the paragraph or highlight all the desired paragraph(s).

- Ctrl + T..... Hang the indent to next tab position
- Ctrl + Shift + T ..... Un-hang the indent to the previous tab
- Ctrl + M..... Shift the left indent to the next tab
- Ctrl + Shift + M..... Return the left indent to the previous tab

## Signature Lines

Thanks to proportional font spacing, it's nearly impossible to get lines made with underscores the same length as any other line. Further, when you print them, you can often see the little notches between the characters; and you cannot type on them. Instead, you should use tab stops to create signature lines in your documents.

If the signature line starts flush against the left margin:

1. Add a left tab stop where you want the signature line to end.
2. Hit the tab key.
3. Select the space created by the tab (or the → if your formatting marks are showing).

4. Underline it.

If your signature line starts over a few inches from the left margin (such as with a pleading):

1. Add a left indent where you want the signature line to begin.
2. Follow the steps above.

If you need side-by-side signature lines:

1. Add a left tab stop where the first signature should end, where the second signature line should begin, and where the second signature line should end.
2. Hit the tab key three times.
3. Select the first tab and underline it.
4. Select the third tab and underline it.

## Borders and Shading

### Borders Around Text

You can apply borders to text or paragraphs. Legal documents don't often use this feature, but it's a nice way to add emphasis to the title of a document or an Exhibit number. In order to apply a border to text, follow these steps:

1. Select the text around which you would like to place the border.
2. **Layout ribbon** → **Page Setup launcher** → **Layout tab** → **Borders... button** → **Borders tab**.

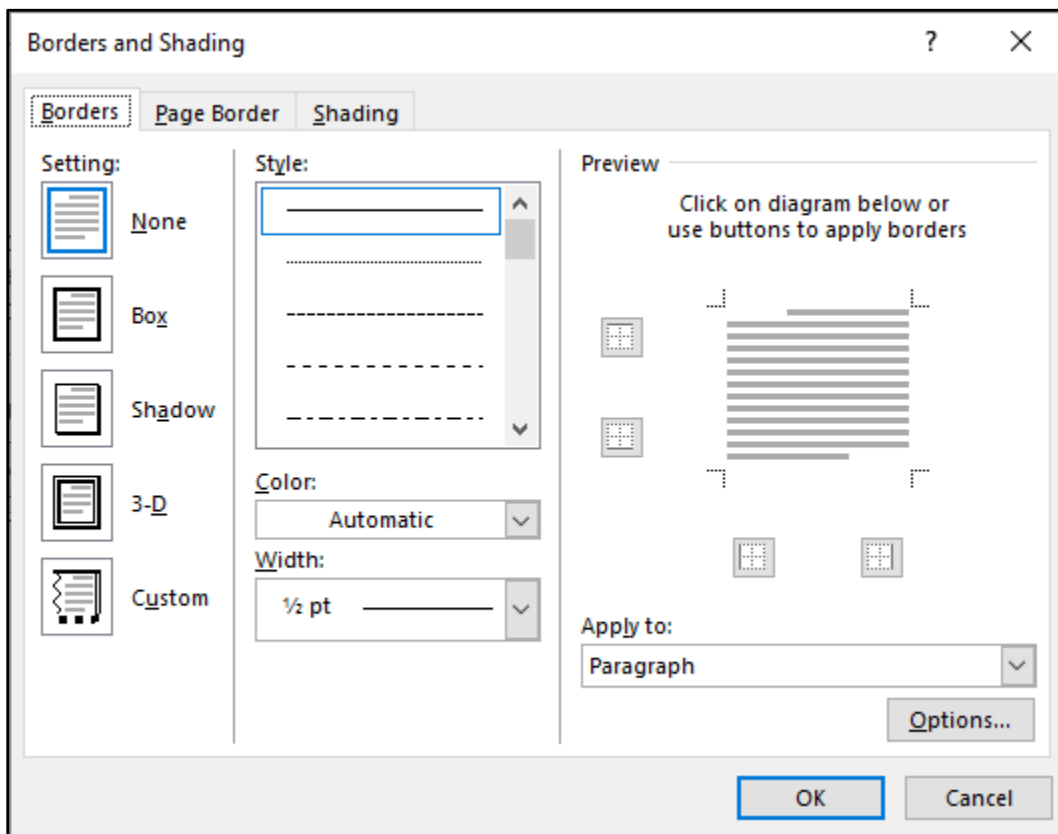


FIGURE 18-20

3. Choose the appropriate **Setting**, **Color** and **Width** and click **OK**.

## Shading Inside a Border

You may want to apply shading to text or more typically, inside a border you've created. To apply shading, follow these steps:

1. Select the text you would like to shade.
2. **Layout ribbon** → **Page Setup launcher** → **Layout tab** → **Borders...** button → **Shading tab**

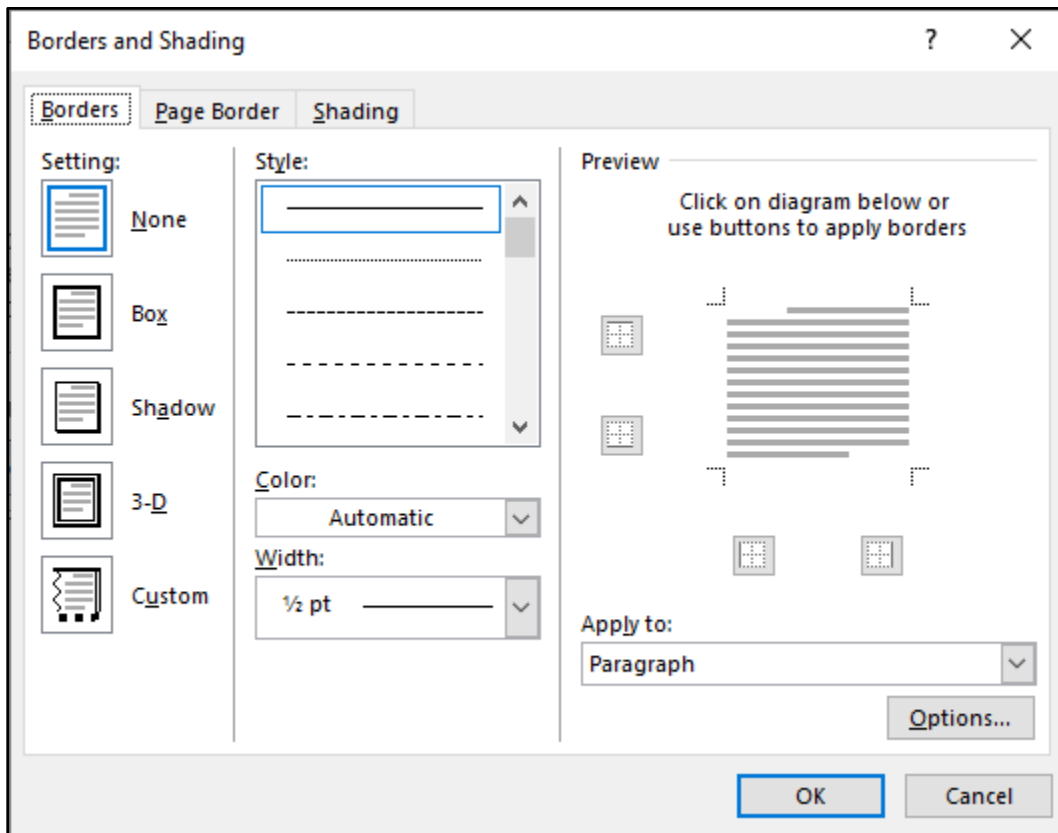


FIGURE 18-21

3. Click on a color under **Fill** and click **OK**. If you want to shade the text gray, be careful because anything darker than 10% shading becomes difficult to read.

# EXHIBIT A

# CHAPTER 19

# PARAGRAPH NUMBERING AND BULLET POINTS

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## Bullets and Numbering Should Be Linked to Styles

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 page 222 below.

Having said all of that, we appreciate the fact that most Word users just want paragraph numbering and don't understand how to control Styles. This chapter is designed to help you get paragraph numbering and/or bullets to work the way you want even though you may not fully understand how to control styles.

## Never Use the Numbering or Bullets Buttons

You could use the Bullets or Numbering buttons ( ) to create a single level bulleted or numbered lists. However, if you determine later that you need sub-levels, **you can't get them** if you started with these buttons because they have no sub-levels. So you would have to start over and re-number/bullet your entire document with the Multilevel List button () .

On the other hand, if you had *started* with the Multilevel List button, you could have just used one of the sub levels already present *and* the Multilevel List button can produce any combination of numbers and/or bullets. The Multilevel list button also has up to 9 levels of bullets or numbers.

Since the Bullets and Numbering buttons can paint you into a corner and force you to start over, you're much better off using the Multilevel List button for all numbering and bullets in your documents. In view of this, we don't believe you should ever use the plain Bullets or Numbering buttons.

## Single Level Bullet Points

By "Single Level," we just mean that there are no sub-levels. Most bulleted lists are like this.

## Applying Bullets

If you have text already typed that you want to add bullets to, select it first. If you're starting from a blank document, then you don't have to select anything first. Click on the **Home ribbon** → **Paragraph group** → **Multilevel List button** (☰) → **Define New Multilevel List**. Then you will see a screen similar to Figure 19-1. Select a bullet from the dropdown titled **Number style for this level**.

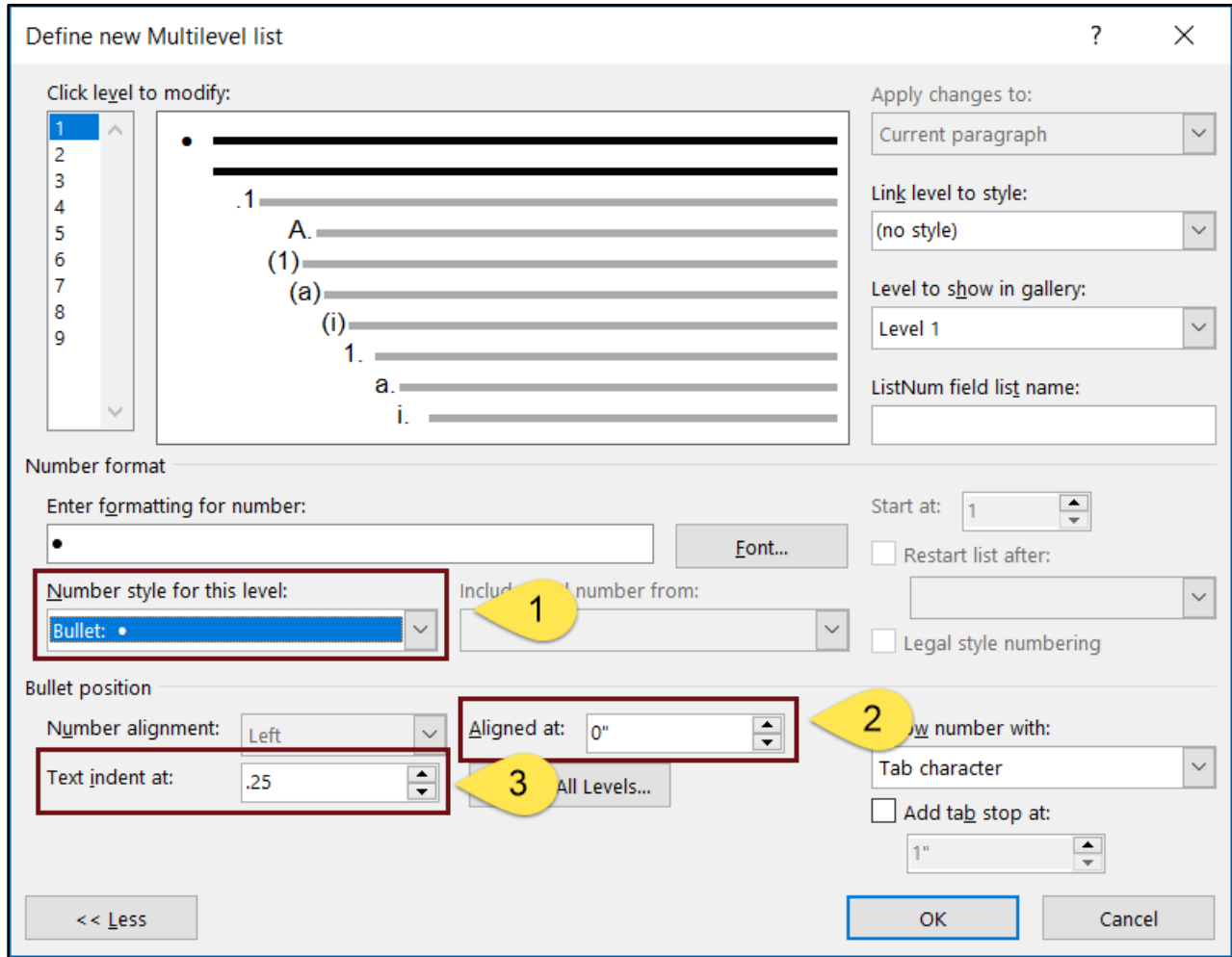


FIGURE 19-1

Next, you need to set your **Aligned at** and **Text indent at** measurements. Aligned at is how far away your bullet is from the left margin. Text indent at is how far away the 2<sup>nd</sup> and subsequent lines of the bulleted paragraph are from the left margin. See Figure 19-2 below.

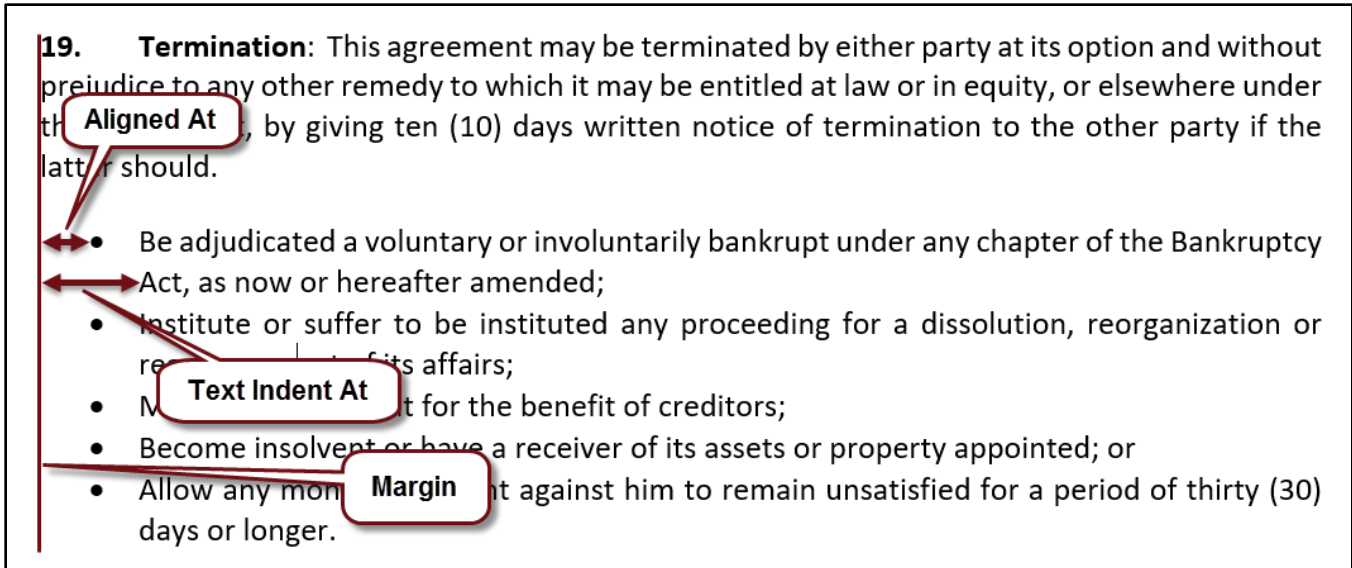


FIGURE 19-2

## Change the Bullet Symbol

In most cases, you're going to get a bullet by default that looks like this: •. If you would prefer a different symbol, right-click any bulleted paragraph → choose **Adjust List Indents** from the menu that appears → under **Number Style for This Level**, scroll down to the bottom of the list and choose **New Bullet**. This will take you to the Symbols dialog and you can choose any one you want.

## Change the Bullet Indents and Alignment


If you want to adjust the indents and alignment, just right-click any bulleted paragraph → choose **Adjust List Indents** and you will see Figure 19-1 again. Make any changes you need to the **Aligned at** and **Text indent at** settings. When you click **OK**, the paragraphs will update to reflect your changes.

## Add Spacing Between Bullets

If you want extra blank lines between each bulleted item, use automatic paragraph spacing (see Spacing Between Paragraphs on page 160 above): Select the paragraphs → right-click any selected text → choose **Paragraph** from the menu that appears → **Indents and Spacing tab** → **Spacing Before/After** → Uncheck the **Don't add space between paragraphs of the same style box** → add a 12 pt after → click **OK**.

## Turn Off Bullets

When you insert a bullet, each time you hit **Enter** another bullet will automatically be inserted at the beginning of the next line. You can turn off bullets several different ways:

- Click the **Home ribbon** → **Paragraph group** → **Bullets button** ;
- Hit **Enter** twice at the end of a bulleted list;
- At the beginning of the paragraph, hit the **Backspace** key; or
- Hit **Ctrl + Shift + N** (which applies the default style called normal).

## Single-Level Paragraph Numbering

This is the same as the Single Level Bullet Points instructions above except that you choose a paragraph number rather than a bullet.




## Multi-Level Paragraph Numbering

### How Multilevel Paragraph Numbering Works

Word allows you to set up automatic paragraph numbering schemes up to 9 levels deep. For example, below is a 4 level deep outline:


- IX. **TERMINATION.**
  - A. **Termination Without Cause.** This agreement may be terminated by either party without cause upon ninety (90) days written notice to the other party, it being understood and agreed that such term and notice are reasonable in relation to the scope of this agreement and the undertakings herein provided for.
  - B. **Termination With Cause.**
    - 1. **Default.** If either party shall default in the performance of any obligation or payment of any indebtedness under this agreement, it shall have 30 days after delivery to it of written notice of such default within which to cure such default. If such defaulting party fails to cure its default within such period of time, then the other party shall have the right to terminate this agreement without further notice.
    - 2. **Other.** This agreement may be terminated by either party at its option and without prejudice to any other remedy to which it may be entitled at law or in equity, or elsewhere under this agreement, by giving ten (10) days written notice of termination to the other party if the latter should.
      - i. Be adjudicated a voluntary or involuntarily bankrupt under any chapter of the Bankruptcy Act, as now or hereafter amended;
      - ii. Institute or suffer to be instituted any proceeding for a dissolution, reorganization or rearrangement of its affairs;
      - iii. Make an assignment for the benefit of creditors;
      - iv. Become insolvent or have a receiver of its assets or property appointed; or
      - v. Allow any money judgment against him to remain unsatisfied for a period of thirty (30) days or longer.

### Why Use Multilevel Numbering

As described previously, the **Bullets button**  and the **Numbering button**  only allow ONE level of bullets or paragraph numbers. Therefore, if you start with either one and later determine that you need a sub-level, you simply can't get there from here (and you're going to have to start over with a multilevel numbering scheme). Because of this, we strongly recommend that you use the **Multilevel List button**  exclusively for numbering or bullets of any kind. Multilevel lists can also handle any kind of bullet point and since there are 9 available levels, it's never a problem to add another level (unless you need 10 or more levels).

### Set Up a Multilevel Paragraph Numbering Scheme

If you already have paragraphs typed and want to apply paragraph numbering after-the-fact, you can do so by selecting the paragraphs and following the steps below. Otherwise, set up the scheme before you start typing.

1. Click the **Home ribbon** → **Paragraph group** → **Multilevel List button arrow**  button).
2. Choose **Define New Multilevel List** at the bottom of the dropdown menu.

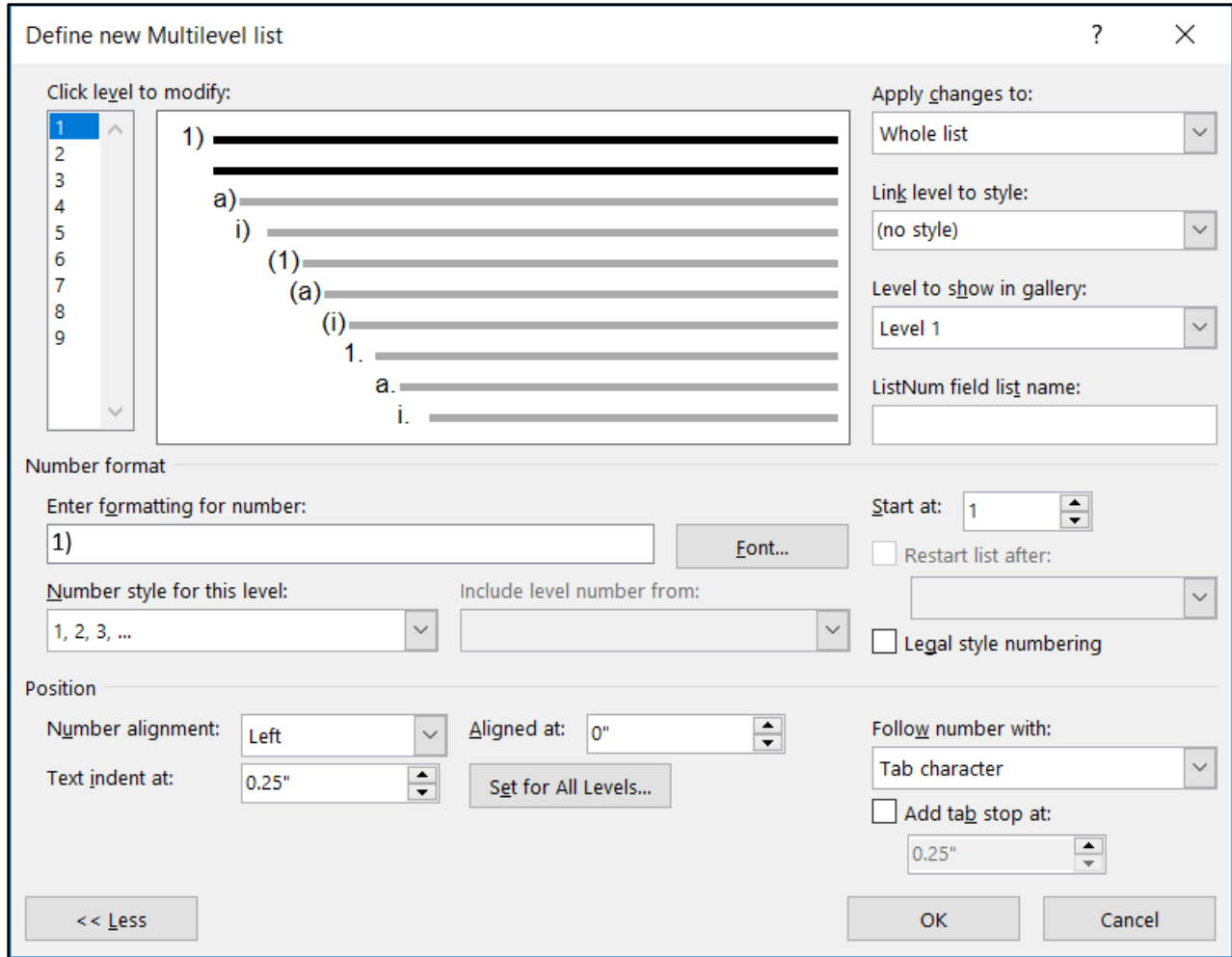


FIGURE 19-3

3. You will now see something similar to Figure 19-3 above. If you see a **More** button in the bottom, left-hand corner of the dialog, [click it](#). Here are a couple of things to keep in mind:
- You can make adjustments to any of the nine levels by simply clicking on the level you want to modify on the top, left side of the dialog.
  - You NEVER type a number in the **Enter formatting for number box**. Instead, you use the code for the paragraph number which will be inserted when you choose something from the **Number style for this level drop down**.
  - **Font button** should only be clicked if you want the formatting for the paragraph number to be *different* from the paragraph that follows it. Therefore, you should not click the Font button in most cases.
  - **Number alignment** must always be set to **Left**, even if you're centering an article number.
  - **Aligned at** means how far away from the left margin you want your number to appear.
  - **Text indent at** means how far from the left margin you want the text following the number to appear.



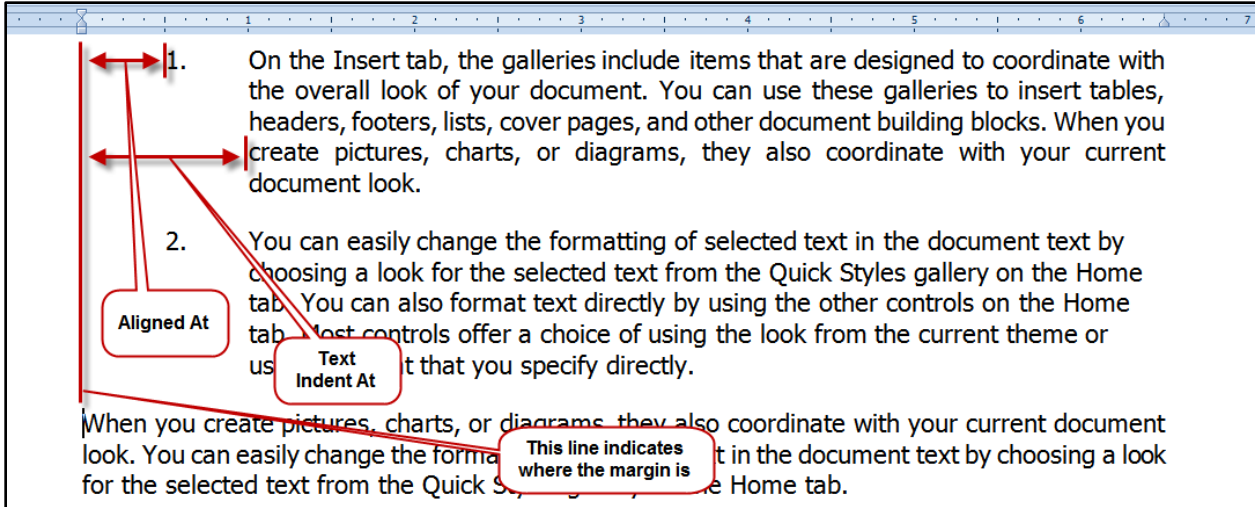


FIGURE 19-4

4. Below I have configured the dialog for a 3-level deep outline. Since I'm not going to use levels 4 - 9, there's no need to format them at this point.

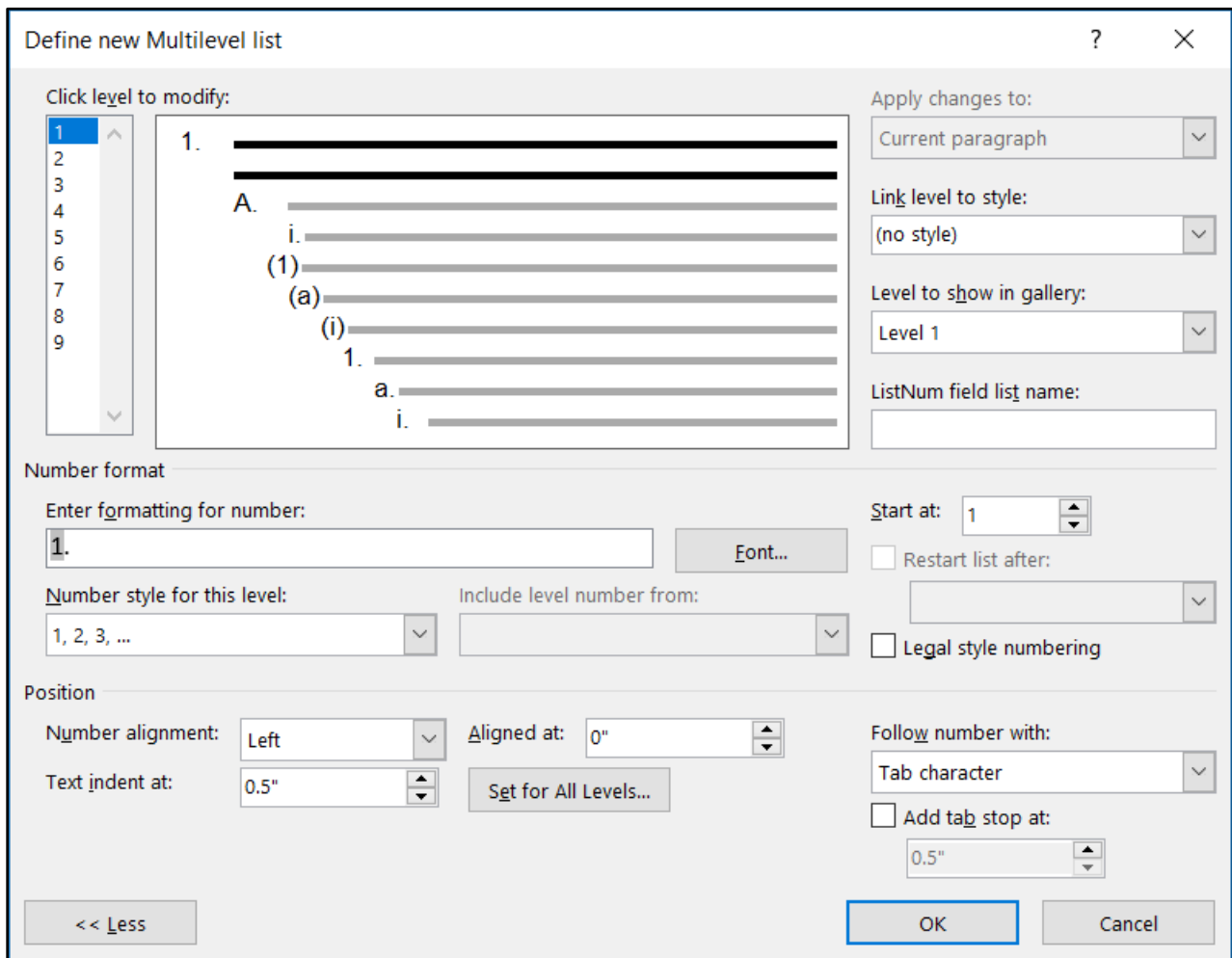



FIGURE 19-5

5. After you've set up the levels the way you want, click **OK** and you'll see a paragraph number appear in your document. Just begin typing. When you hit **Enter** for the next paragraph, you'll get the next subsequent number automatically.
6. If you want to change the level of the next paragraph to a sublevel (level 2 rather than level 1), you can use any of the following methods:
  - You can promote or demote a paragraph by clicking the **Home ribbon** → **Paragraph group** → **Decrease/Increase Indent buttons** .
  - If your cursor is at the beginning of a paragraph you can demote it by hitting the **Tab key** on your keyboard. Promote by hitting **Shift + Tab**.
  - If you right-click the paragraph, you can promote it by choosing **Increase Indent** or demote it by choosing **Decrease Indent**.

## Add Spacing Between Numbered Paragraphs

If you want to add spacing between the numbered paragraphs, select all of the paragraphs you've typed, click **Home ribbon** → **Paragraph launcher**. Add a **12 pt Space After** and uncheck **Don't add space between paragraphs of the same style**. Then click **OK**.

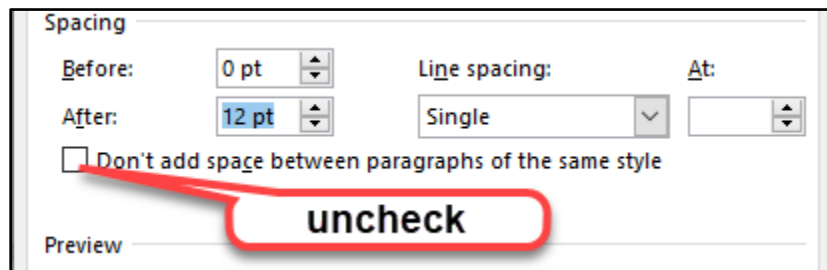



FIGURE 19-6

## Make All Paragraphs Double Spaced

The explanation for adding spacing between numbered paragraphs above assumes you have single spaced paragraphs and would like extra space between each one. If you just want every paragraph double-spaced, don't add space between them or you'll end up with too much space between each paragraph when you apply the double space formatting. Instead, select all of the paragraphs you've typed, and click **Home ribbon** → **Paragraph launcher** → set **Line Spacing** to **double** (SK: **Ctrl + 2**). Of course, you can also apply double spacing by using the **Home ribbon** → **Paragraph group** → **Line and Paragraph spacing button** ; or right-click the selected paragraphs, choosing **Paragraph**, then switching **Line Spacing** from **single** to **double**.

## Restart Numbering at 1

Right-click the paragraph you want to start over again at 1 and choose **Restart at 1**.


## Make Changes to Your Numbering Scheme

If you decide you want to change something about the numbering scheme you've created, right-click any paragraph and choose **Adjust List Indents**. You'll be presented with the Multilevel list dialog again and you can make changes. Note that you *do not* have to be in the first paragraph to do this. For example, let's say I have 3 pages of numbered paragraphs when I decide that I want to change the top level of the outline from Arabic (1.) to Roman Numerals (I.). Right-click

any paragraph in the numbered list, choose **Adjust List Indents**, click on **Level 1**, and change **Number style for this level** from **1, 2, 3, ...** to **I, II, III, ...** and click **OK**. As you'll see the entire list will change (above and below the paragraph that you right-clicked in the first place).

## Turn Numbering Off

There are several ways to do this:

- Hit the **Backspace key** twice; or
- Click the **Numbering button**  once

# CHAPTER 20

# PAGE FORMATTING

## (SECTIONS PART 1)

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto: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.

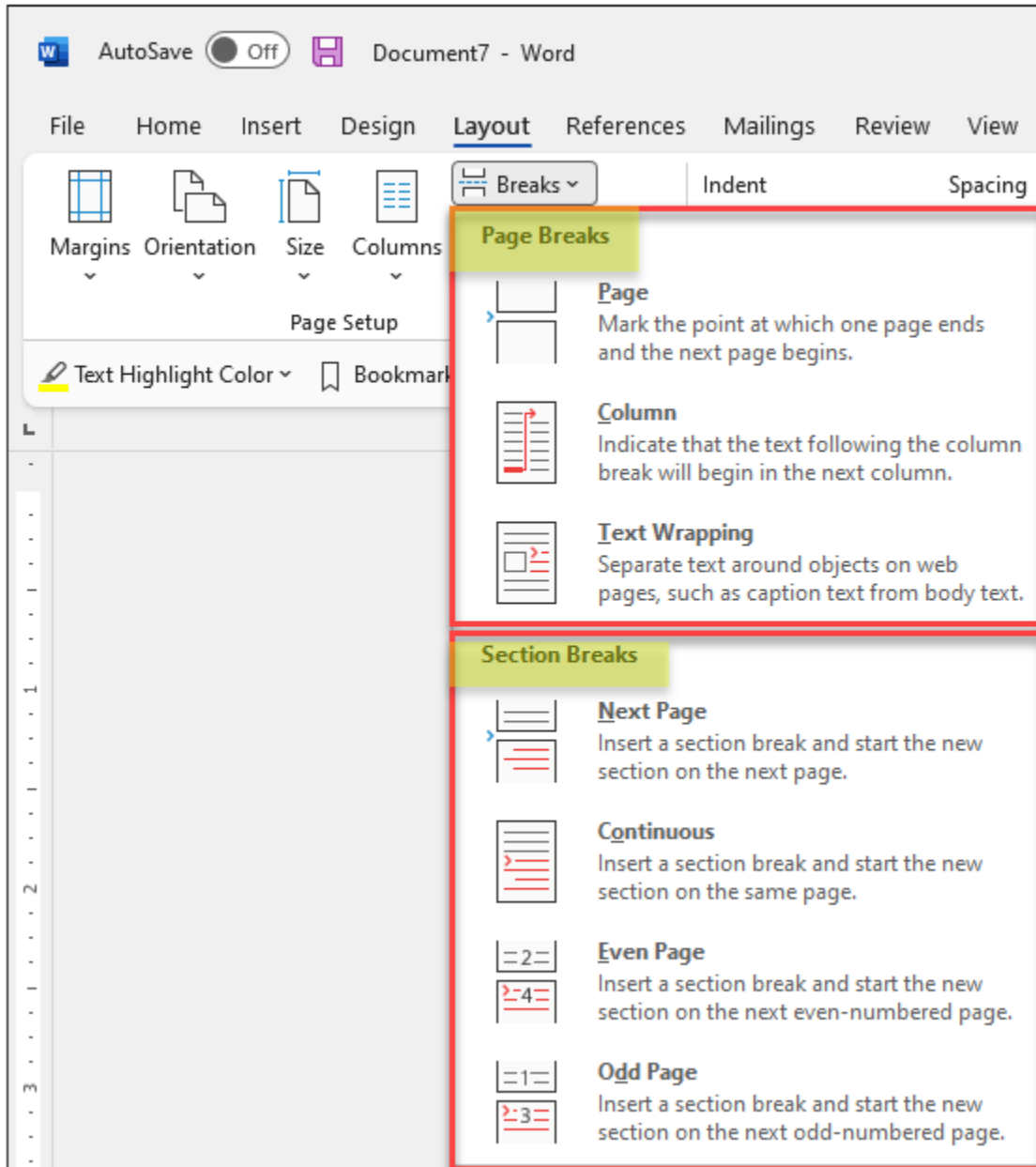


FIGURE 20-1

If your formatting marks are turned on (see page 148), 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.

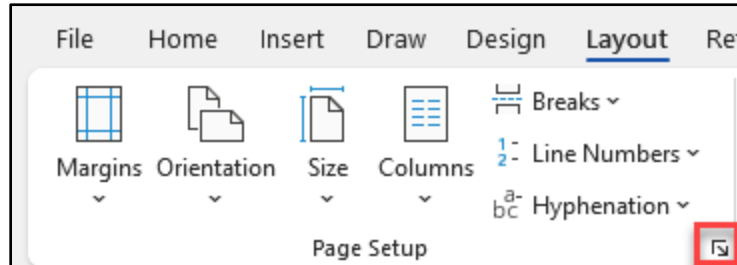


FIGURE 20-2

### 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 20-3

#### 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.

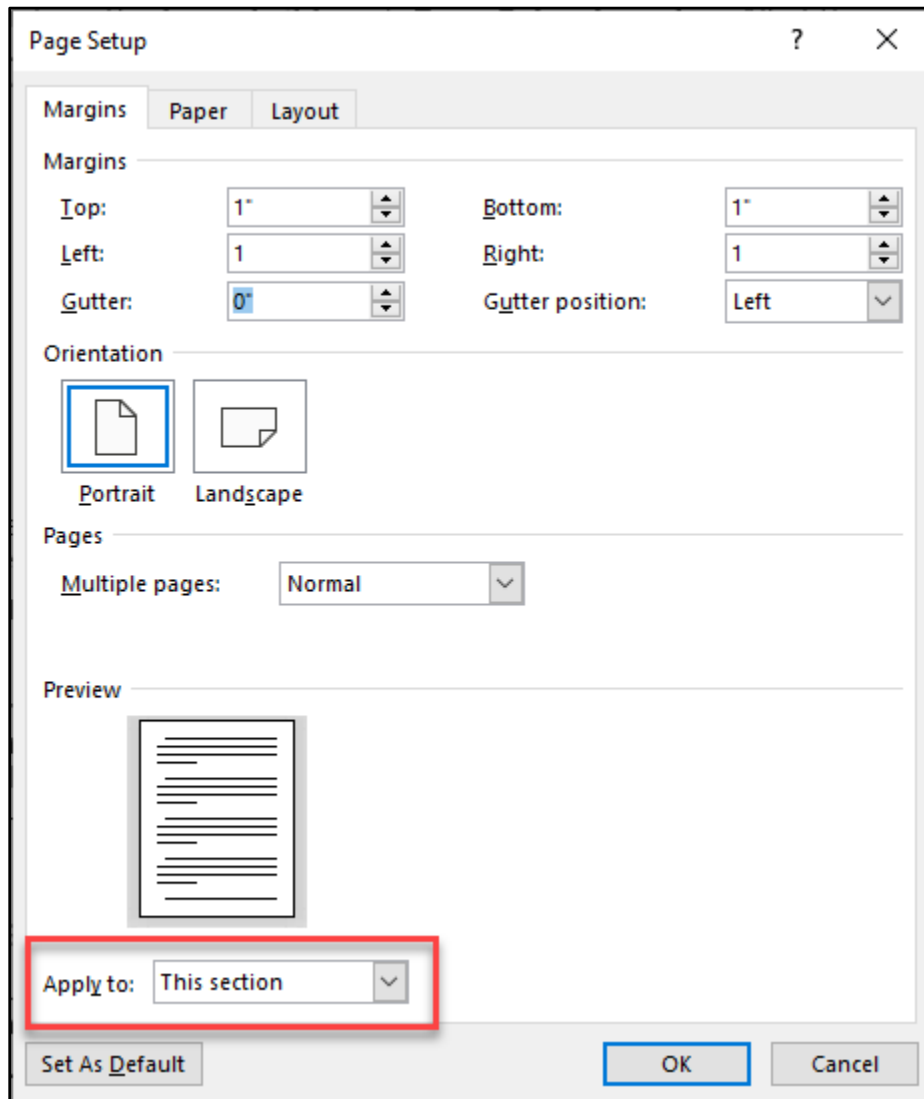


FIGURE 20-4

## 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**.

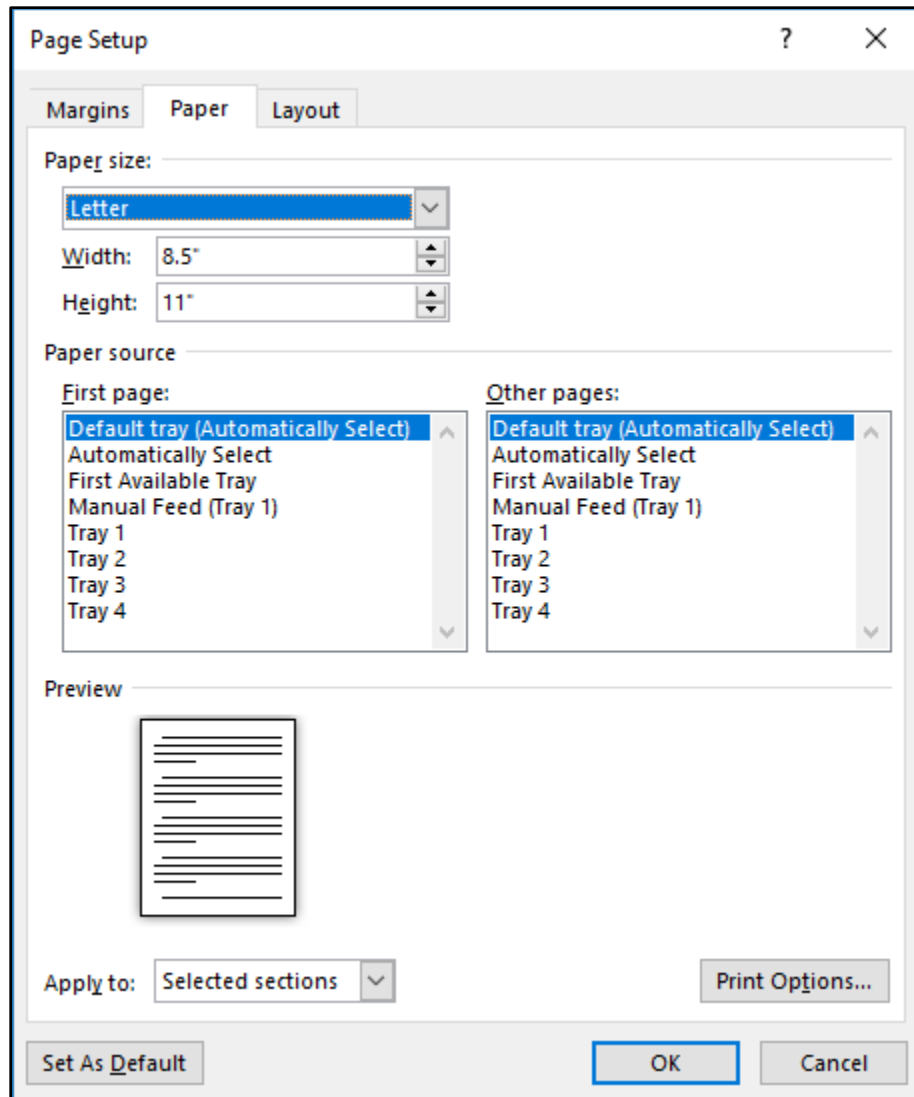


FIGURE 20-5

## 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**.



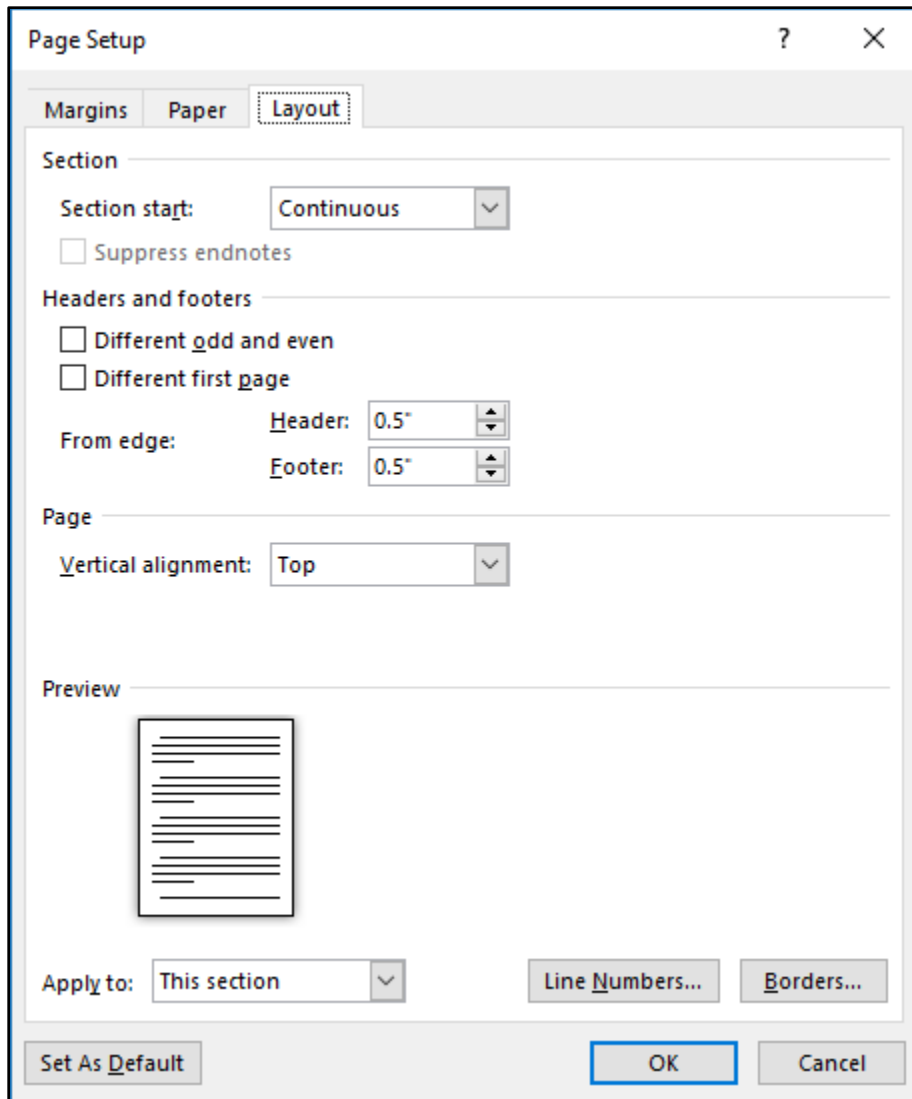


FIGURE 20-6

## Line Numbering

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

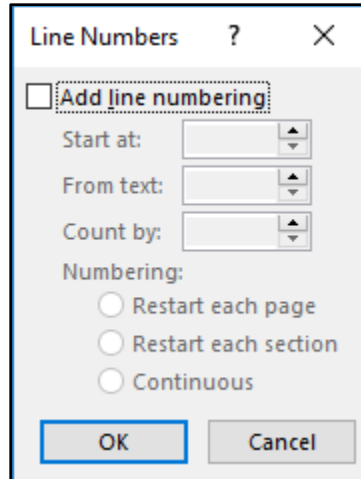


FIGURE 20-7

## 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

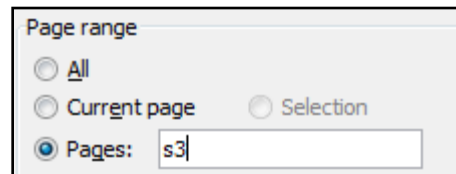


FIGURE 20-8

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

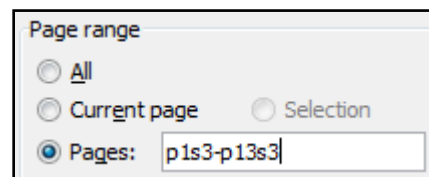


FIGURE 20-9

# CHAPTER 21

## HEADERS, FOOTERS & PAGE NUMBERING

### (SECTIONS PART 2)

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

### Header and Footer Ribbon

Whenever you edit a header or footer, the Header/Footer contextual tab and ribbon appear.

In 2013/16/19 it looks like this:

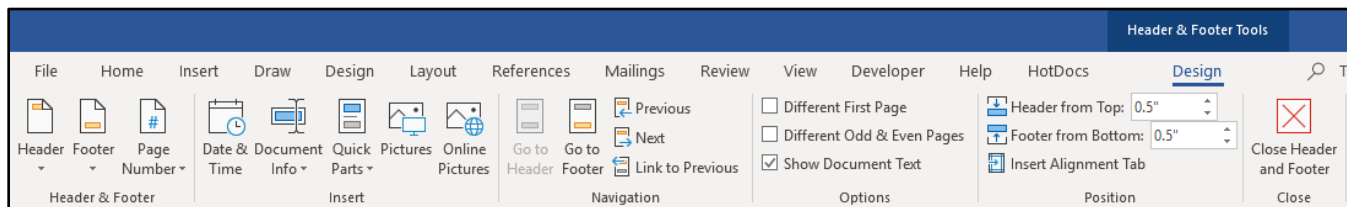


FIGURE 21-1

In 365/2021 it looks like this:

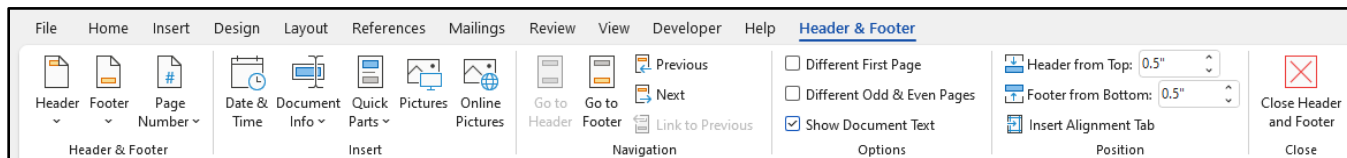


FIGURE 21-2

### Create a Header or Footer

1. Click on the page or in the section in which you would like to create a header or footer.
2. On the **Insert ribbon** → **Header & Footer group** → **Footer button** → **Edit Footer**. The Header/Footer ribbon will appear and the header and footer spaces will be outlined with dashed lines. You can also insert a header or footer by double clicking the margin where the header or footer will be.
3. Place your cursor in the appropriate header or footer and type your text. Note that you will not be able to type in the body of document until you close the **Header/Footer ribbon**. You can close the ribbon by double clicking in the body of your document or clicking the **Header/Footer ribbon** → **Close group** → **Close Header and Footer button**.

## Our Advice on Page Numbering

### There Are Two Ways to Add Page Numbers

Word allows you to create page numbering in footers or headers of documents via two methods. The first method is to use the **Insert ribbon → Header & Footer Group → Page Number button**. The second method is to insert it directly into the header or footer, as discussed below.

### Problem With Page Number Button

If you click the **Page Number button → Top of Page** or **Bottom of Page →** and choose a format, you'll find that doing so will delete anything you had previously typed in the footer or header that you're adding the page number to. Further, Word adds an unnecessary, extra hard return after the page number which you're going to have to delete. We have received countless tech support calls regarding this issue from frustrated Word users. Most recently, a caller was using a letterhead template which already had a footer on each page of the address and phone number. Every time the caller tried to insert a page number using **Page Number button → Bottom of Page → Plain Number centered**, it would delete the address and phone number from the footer and *replace* it with a page number and unnecessary extra hard return. Follow the next set of steps for adding page numbers that will work every time.

### Page Numbers Manually Inserted into a Header or Footer

1. Click the **Insert ribbon → Header & Footer group → Footer button → Edit Footer**.
2. Put your cursor where you'd like the page number in the header/footer → click on the **Header & Footer ribbon → Header & Footer group → Page Number button → Current Position → Plain Number**.
3. Click the **Header & Footer ribbon → Close group → Close Header and Footer button** to close the **Header/Footer ribbon** and revise the body of your document.

Follow the foregoing steps every single time and you'll have no problems with page numbering.

### Insert the Total Number of Pages in the Document

To insert the total number of pages in the document when you are editing a headnote or footnote (**Insert ribbon → Header & Footer group → Footer button → Edit Footer**), click on the **Header & Footer ribbon → Insert group → Quick Parts button → Field button → set Categories to All → set Field names to NumPages → set the Field Properties to how you would like the number of pages displayed → OK**.

### Number All Pages Except The First

#### When This Is Appropriate

We often do not want to page number the first page but want to number second and subsequent. Another relevant example would be a letter in which you want no page numbering on the first page because it will be printed on letterhead, but you would like to add a header on all subsequent pages that looks something like this:

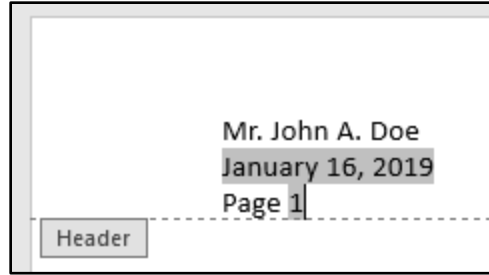


FIGURE 21-3

## How to Set It Up

This is most easily illustrated with an example. Assume you have a 3 page document and you'd like to number pages 2 and 3 only. Simply follow these steps:

1. Open the document in Word that you want to page number.
2. Click the **Insert ribbon** → **Header & Footer group** → **Footer button** → **Edit Footer**. Click the **Home ribbon** → **Paragraph group** → **Center button** (SK: **Ctrl + E**) to center your cursor in the footer.
3. In **Header & Footer ribbon**, which appears because you're editing the Footer, click the **Header & Footer group** → **Page Number button** → **Current Position** → **Plain Number** (which will insert a page number where your cursor was).
4. In order to turn off the page numbering for page 1 (but leave it for all of the other pages), click on the **Header and Footer Tools ribbon** → **Options group** → check the **Different First Page box**.

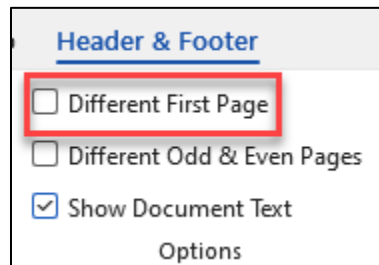


FIGURE 21-4

5. The foregoing step will *remove* the page number from page 1 but leave it on all subsequent pages.
6. Click the **Header & Footer ribbon** → **Close group** → **Close Header and Footer button** and you're done!

## Create Page Numbering within Multi-Section Documents

### What Is a Multi-Section Document?

A multi-section document is any document which contains section breaks. In this particular case, we're talking about documents in which you must start the page numbering over or switch the page numbering format somewhere in the middle of the document.

## Page Numbering Rules

Page numbering in multi-section documents is not particularly easy, so we've devised the Affinity Page Numbering Rules to help you. Following these rules will save your hours of frustration. You'll see their application as we walk through the example below:

- **First Page Numbering Rule:** If you don't want to number the first page, then you must click the **Layout ribbon** → **Page Setup launcher** → **Layout tab** → check the **Different first page check box**.

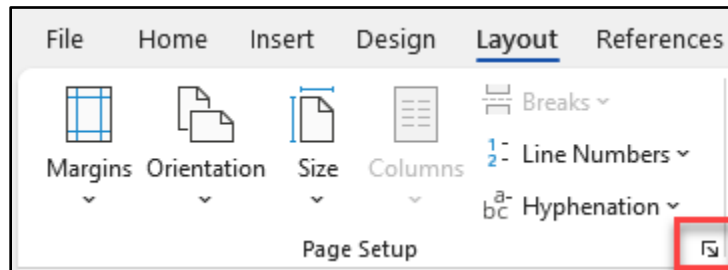


FIGURE 21-5

- **Start Over Section Break Rule:** Within a document, if you want to start page numbering over again at 1, change the numbering format, or turn off page numbering altogether, then you must insert a Section Break into your document. Insert the Section Break immediately before the place you intend to make the numbering change. (To insert a Section Break: **Layout ribbon** → **Page Setup group** → **Breaks button** → select the type of break you would like to insert. For more information, see Chapter 20.)
- **Always Read The Labels Rule:** Always read the header/footer labels. They will tell you where you're at in the document and what's going on. Read first, THEN act. The labels you're looking for look like this:



FIGURE 21-6

- **Same as Previous Is Evil Rule:** If you see the **Same as Previous** label, then the header or footer you're looking at is LINKED to the one in the previous section. That means that if you modify it while it's linked, it will change the header/footer in the previous section. Therefore, you'll almost always want to turn this evil feature off. You turn it off by turning off the **Link to Previous button** on the **Header & Footer ribbon** → **Navigation group** → click the **Link to Previous button** to turn it off.

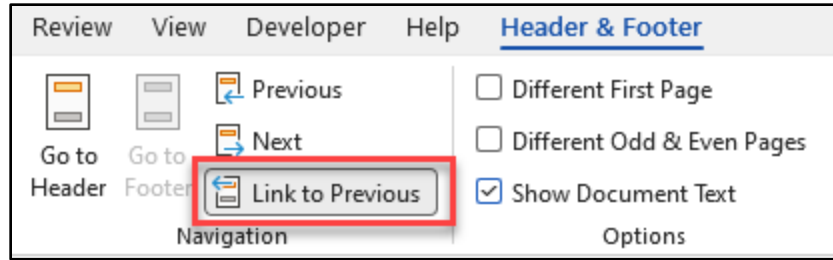


FIGURE 21-7


- **Cut The Link, Then Act Rule:** If you see the evil **Same as Previous label**, you must resist the temptation to modify the header or footer until you cut the link between the sections. The purpose of this rule is to remind you that you need to cut the link FIRST, then make your changes. If you change first, then cut the link, it's too late and you've already changed the header or footer in the previous section.
- **Always Click Into The Header/Footer You Want to Modify Rule:** If you want to make a change to a particular header or footer, you must remember to insert your cursor into that header or footer before you do anything. This is an important rule because you can be VIEWING a footer in section 2 (for example), but your cursor is still in the footer in section 1 of the previous page. If you make any changes, section 1 is going to be affected since that's where your cursor is.

### Example

In this example, we've got a Physician Recruitment Agreement which is comprised of a 2 page table of contents on physical pages 1 - 2 of the document. The body of the Agreement begins on physical page 3 and runs 11 more pages. Therefore, the document has a total of 13 pages. On every page of the table of contents, we want page numbers with Roman numerals. On physical page 3 of the document, which is the first page of the body of the Agreement, we want no page number at all. Thereafter (beginning on physical page 4 of the document), we want page numbering with the format "2 of 11," "3 of 11," etc. for the remainder of the document. None of these page numbers will be typed, they will all be fields that auto-calculate.

Follow these steps:

1. First, since we intend to start page numbering over between the table of contents and the body of the document, the **Start Over Section Break Rule** above dictates that we must have a section break after the table of contents for that to be possible.

Open your document, turn on the Show Hide button  (**Home ribbon → Paragraph group → Show Hide button**) so you can see page and section breaks and go to the bottom of the table of contents to see what is there. We see the following screen shot, so we know this is not a section break, it's just a page break and that won't help us.

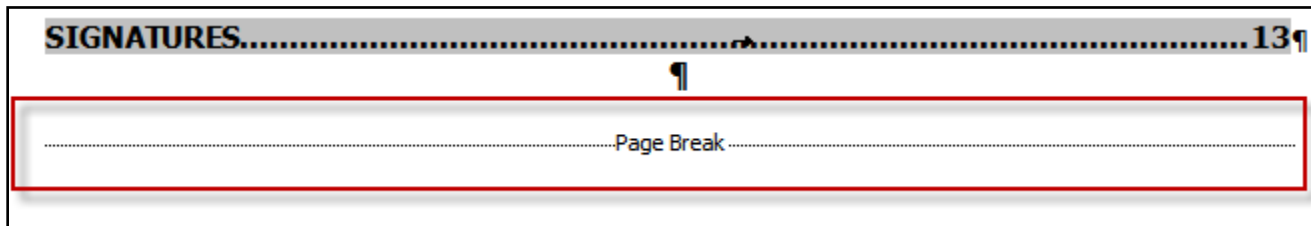


FIGURE 21-8

2. Place your cursor immediately to the left of the page break line and hit the **Delete** key on your keyboard. Now you'll see the title of the body of the document, "PHYSICIAN RECRUITMENT AGREEMENT," appears immediately to the right of your cursor.
3. Leave your cursor where it is, then click Layout ribbon ➔ Breaks button in the Page Setup group ➔ click Next Page under Section Breaks. Now you've got the necessary section break between the table of contents and the body of the document. Your table of contents is now Section 1 and the rest of the document is Section 2.
4. Go to page 1 of your document (hit **Ctrl + Home**), then click the Insert ribbon ➔ Footer button ➔ Edit Footer. Your cursor should be in the Footer, Section 1. If that isn't what the label says, then move up or down as necessary to get into the first page footer of section 1.
5. Remember that we want every page of the table of contents to have a page number on it. Therefore, we must remember the **First Page Numbering Rule** which says that if you don't want to number the first page, then you must check the Different First Page checkbox which you can easily access from the Header & Footer ribbon. Click on that ribbon and check to see if the box is checked (it shouldn't be). Since we do want to number the first page, we need to make sure this box isn't checked. Once you become familiar with how Word handles headers and footers, you would know immediately that the box wasn't checked because of the label on the footer. Our label says **Footer -Section 1-**. If the **Different first page** box were checked, the label would have read **First Page Footer - Section 1-**.
6. We want to put a page number in the footer of page 1 so follow the **Always Click Into The Header/Footer You Want to Modify Rule** and click into that footer. Now click the Page Number button on the Header & Footer ribbon ➔ Current Position ➔ Plain Number. Now center it by hitting **Ctrl + E**.
7. To switch the number from Arabic to small Roman Numerals (i, ii, iii...), click the Header & Footer ribbon ➔ Page Number button ➔ Format Page Numbers and switch to small Roman Numerals with the drop down menu adjacent to **Number format**.
8. Scroll down to page 2 and you should see that there is a "ii" in the footer of that page. Section 1 is done.
9. Now scroll down to the footer on page 3 and follow the **Always Read The Labels Rule**. This footer is not at all what we want:



FIGURE 21-9

10. Remember that we don't want a page number on the first page of the body of the document, so we need to follow the **First Page Numbering Rule**. In the Header & Footer ribbon ➔ in the Options group, check Different First page. Once you do that, your label changes as in the following screenshot and the page number disappears. Word assumes that if you check the **Different first page** box, then you don't want to number the first



page. You can always insert a page number if you want to, but in this case, Word's assumption is correct.

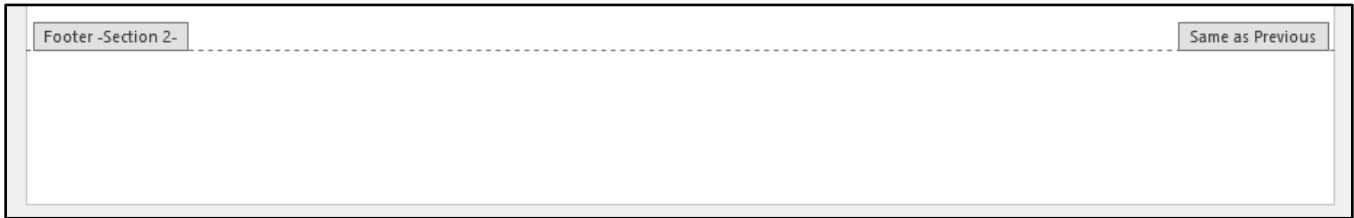


FIGURE 21-10

11. Now scroll down to the footer on physical page 4. Again, this is not at all what we want because it should say **Page 2 of 11**, not **4**.

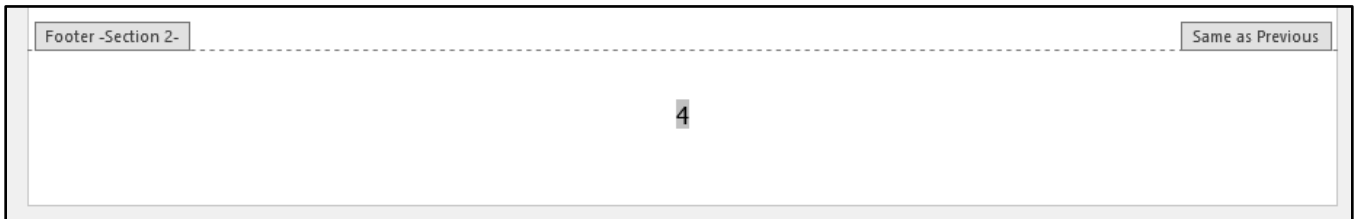


FIGURE 21-11

12. Now, three rules come into play: the Start Over Section Break Rule, the Same As Previous Is Evil Rule and the Cut The Link, Then Act Rule.
13. First, by being labeled "Same as Previous," the section 2 footer is telling you that it is still linked to the footer we established in the table of contents (section 1). Therefore, if you delete or make changes to this page number, you're going to simultaneously delete or change the page number in section 1. To avoid this, first follow the **Always Click Into The Header/Footer You Want to Modify Rule**. Now cut the link by clicking the **Header & Footer ribbon** → click the **Link To Previous button** (to turn it off). The "Same as Previous" label should disappear.
14. Second, we need to tell Word that we're starting page numbering over again in Section 2. In order to do that, click the **Header & Footer ribbon** → **Page Number button** → **Format Page Numbers** → click **Start at**, then **OK**.

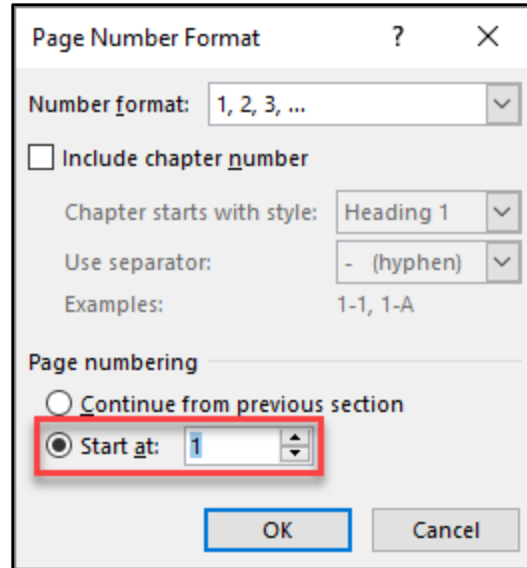


FIGURE 21-12

15. After you click **OK** in the previous step, you need to revisit the **Always Read The Labels Rule**. It looks as if your page number disappeared, but actually, Word jumped you back up to the footer at the bottom of page 3 and you were previously in the footer at the bottom of page 4. Don't be alarmed, just scroll back down to the bottom of page 4 and you should see that the page number has changed from 4 to 2.
16. Place your cursor in front of the page number and type the word "Page" plus a space. Now click after the page number and add " of ." Now we're ready to insert the code for the total number of pages. However, we don't want the total number of pages in the document because that would include the table of contents. Instead, we want the total number of pages in *Section 2*. To do this, click the **Insert ribbon** → **Quick Parts button** → **Field** → **SectionPages** → **OK**:

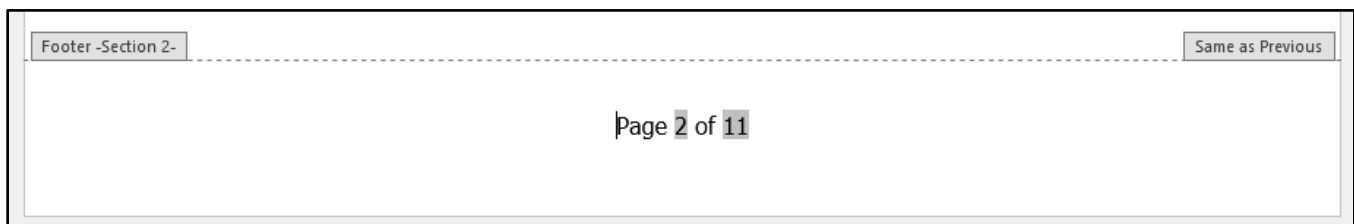


FIGURE 21-13

17. Click the Close Header and Footer button on the Header & Footer ribbon and you're done!!

## Insert the Total Number of Pages in a Particular Section of the Document

If you are in a multiple section document, and you want the page numbers to read Page 1 of 5 when there are 10 total pages in the document, but only 5 pages in the section, you'll need this trick:

1. Position your cursor where you would like to insert the total number of pages in a particular section.
2. Click **Insert ribbon** → **Text group** → **Quick Parts button** → **Fields**.

- Under **Field names**, choose **SectionPages**, format the **Field properties** as you would like and click **OK**.

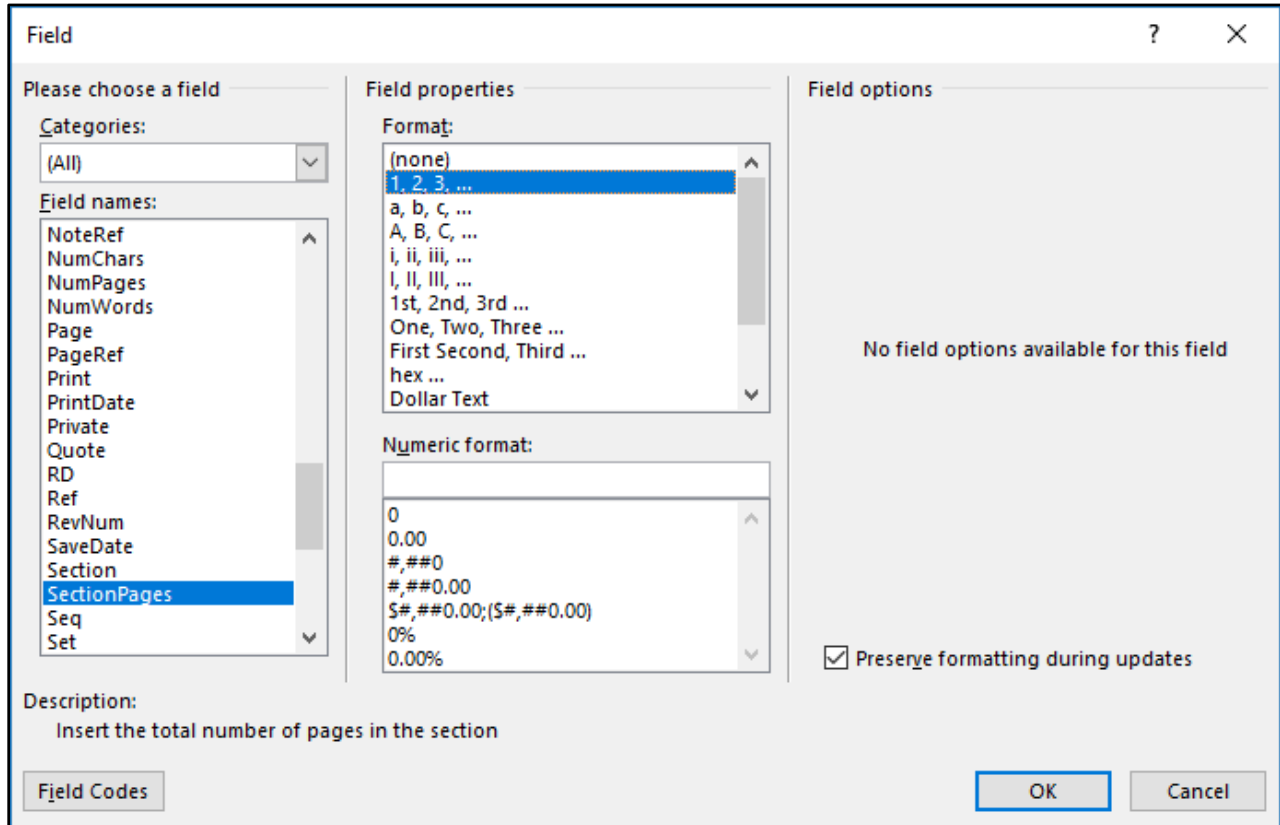


Figure 21-14

## Insert the Filename and Path in the Footer of Your Document

- Place the cursor in the footer where you would like the path to appear. (To edit the footer and be able to place your cursor into the footer, click **Insert ribbon** → **Header & Footer group** → **Footer button** → **Edit footer**.)
- Click **Header & Footer ribbon** → **Insert group** → **Quick Part button** → **Field**. Under **Field names** select **Filename** and check whether you would like the path included. Click **OK**.

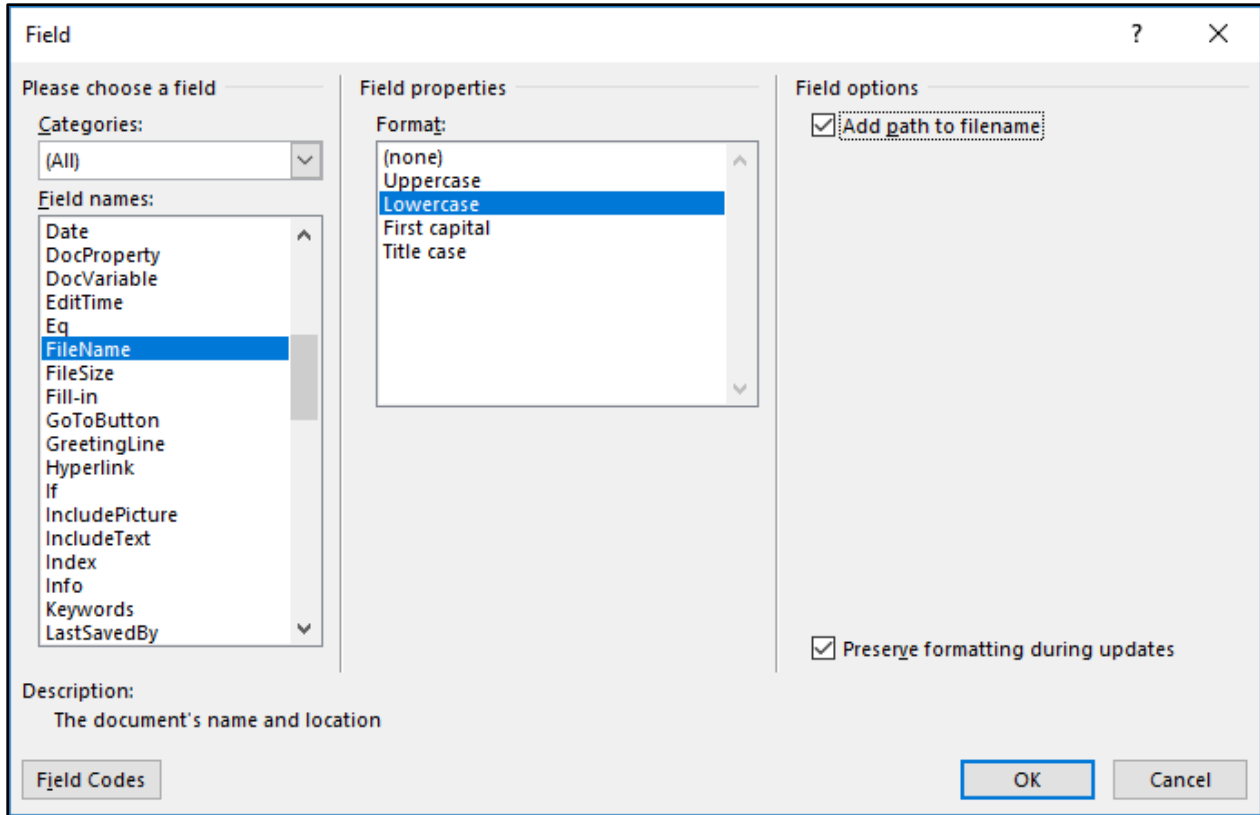


FIGURE 21-15

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

Insert the following field into the footer of a document. Use **Ctrl + F9** to insert the brackets shown below and type it exactly as shown. Here, underscores represent spaces (there are no actual underscores in the field). This will drop the file and pathname in lower case on **ONLY** the last page footer.

```
{_IF_{_PAGE_}=_{_NUMPAGES_}_"{_FILENAME_}\*_Lower_\p_\*_MERGEFORMAT}"_""}
```

# CHAPTER 22

# INTRODUCTION TO STYLES

---

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

## Using These Styles Chapters

This chapter and the next several chapters cover how to use styles. We recommend reading them from top to bottom and referencing specific portions as needed down the road. This chapter starts with an introduction to styles. The other chapters will make more sense once you've had this primer and understand the concepts related to styles better.

If you *never* need to modify styles (perhaps you have someone else who handles that for you), you can skip ahead to Chapter 23 on page 206. Otherwise, start here and work your way through the next several chapters to gain a thorough understanding of how to use styles.

## What Are Styles?

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 set of formatting changes at once. Think of styles as a car radio pre-set button. Every time you push the button, you're back on the exact station you programmed the button for. Every time you apply a style, you get the same set of formatting changes you programmed the style for.

## Two Formatting Approaches in Word

### Direct Formatting

If you want a heading to be bold, underlined, Arial 14 point, and centered, one way of achieving that is by selecting the text and manually applying those formatting attributes by using buttons and/or shortcut keys (like Ctrl + B for bold). Selecting text and manually applying formatting is known as "Direct Formatting." It is time-consuming and difficult to ensure consistency throughout your document when using direct formatting. This is how most people format Word documents.

### Formatting With Styles

An alternative and much better way of formatting the heading to be bold, underlined, Arial 14 point, and centered is to use a style to do it. I could modify the style called "Heading 1" to match these formatting attributes. When I apply Heading 1 to the text, it will automatically convert it from whatever it was before to my new style definition. Using styles is faster and ensures formatting consistency throughout your document.

## Advantages of Styles

### Speed

You can assign very complex combinations of character and paragraph formatting to a particular style and then apply that style with a single keystroke or click. As such, styles are faster to use than Direct Formatting.

### Ease of Updating

Assume you've used styles throughout your document and then decide you don't like the way something is formatted. Instead of manually reformatting every paragraph, all you have to do is change the style *definition*. Once changed, all the text to which the style had been applied, throughout the document, immediately updates without any Direct Formatting on your part.

### Enforce Formatting Consistency and Make Editing Easier

Once styles are setup, users don't have to remember complex formatting techniques; they can simply select a style from the list. This prefab formatting also ensures that all of the documents created with the same styles will look the same.

### Tables of Contents

If you use styles for the headings and numbered paragraphs in a document, you do not need to mark text for inclusion in a table of contents, because Word can generate tables of contents directly from the styles used in the document.

### Navigation

If you've used Heading styles (explained below) to control formatting in your document, you can use the **Navigation Pane (View ribbon ► Show group ► check the Navigation Pane checkbox)** to quickly navigate your document.

## Where Styles Are Stored

Styles are stored inside each document. If you use templates, you can store styles inside the templates and all new documents based on those templates will contain the same styles. Templates are like containers which can contain text as well as styles, macros, toolbars and the like. We'll discuss templates in greater detail later in this manual in Chapter 34.

## Rules of Styles

As you begin to understand styles, it's important to keep the following rules in mind. These concepts will be explored in further detail in the next few chapters.

### Unique Formatting Requires a Different Style

As previously mentioned, when you just type in a document, Word automatically applies the Normal style to the text. However, in order to properly use styles, you need to apply a different style to each type of unique formatting within the document. For example, in Figure 22-1 below, there are 4 levels of outline numbered paragraphs. Each one is a unique type of formatting and requires a different style. The proper way to format such a document would be to apply the style called Heading 1 to the Articles, Heading 2 to the 2<sup>nd</sup> level of the outline, Heading 3 to the 3<sup>rd</sup> level

and Heading 4 to the 4<sup>th</sup> level. Of course, if these Heading styles do not currently format the text the way I see it, I will have to alter their settings so they match the formatting I'm trying to achieve.

Having said that, if there's a section of easy formatting somewhere in the document and that formatting doesn't reappear anywhere else, it's fine to manually format those things. For example, a signature block may not require its own style because by the time you create one to handle it, you could have already formatted it manually and moved on. If, however, you need to add something like an attestation clause, notarization, or other formatted text, see the information on AutoText and Quick Parts contained in Chapter 33 commencing on page 273.

**ARTICLE III.**  
**CAPITAL CONTRIBUTIONS**

**3.1. Initial Capital Contributions.**

(a) Each Member shall contribute to the capital of the Company the amounts set forth opposite such Member's name on Exhibit B.

(b) No interest shall accrue on any capital contribution and no Member shall have any right to withdraw or to be repaid any capital contribution except as provided in this Agreement.

**3.2. Additional Capital Contributions.** The Members shall contribute to the capital of the Company such amounts as the Manager may determine to be necessary or appropriate to conduct the business or carry out the purposes of the Company. Any such additional capital shall be contributed by the Members pro rata, in proportion to their Units, or on any other basis agreeable to them.

**3.3. Loans.**

(a) If any Member (a "Declining Member") declines to contribute additional capital to the Company following a request for additional capital by the Manager pursuant to Section 3.2 above, then the other Members shall have the right, but not the obligation, to take whichever (if either) of the following actions that the Manager deems appropriate:

(1) Loan to the Company, in the ratios that the Percentage Interests of such other Members bear to each other or in any other ratios agreeable to them, the entire amount requested by the Manager. Any such loan(s) shall (i) be unsecured, unless all of such other Members agree otherwise, (ii) bear interest at 2% over the prime rate as publicly announced from time to time by the Bank, and (iii) be repayable from the first funds available to the Company.

FIGURE 22-1

Therefore, if properly formatted with styles, the paragraphs would have the following headings applied (see labels to the left):

Heading 1	<b>ARTICLE III. CAPITAL CONTRIBUTIONS</b>
Heading 2	<b>3.1. <u>Initial Capital Contributions.</u></b>
Heading 3	(a) Each Member shall contribute to the capital of the Company the amounts set forth opposite such Member's name on Exhibit B.
Heading 3	(b) No interest shall accrue on any capital contribution and no Member shall have any right to withdraw or to be repaid any capital contribution except as provided in this Agreement.
Heading 2	<b>3.2. <u>Additional Capital Contributions.</u></b> The Members shall contribute to the capital of the Company such amounts as the Manager may determine to be necessary or appropriate to conduct the business or carry out the purposes of the Company. Any such additional capital shall be contributed by the Members pro rata, in proportion to their Units, or on any other basis agreeable to them.

FIGURE 22-2

## Word Uses Styles Without Your Knowledge or Consent

When you type text into a document, Word automatically applies a specific style depending upon where your cursor is and what you're doing. For example, if you're in a header, Word automatically applies a style called Header. The mere act of typing in a header box causes this to happen.

Word applies a style called Normal to all text in the body every document. You cannot turn off this automatic application of styles. Therefore, the text in the body of every document typically has the Normal style applied to it. The only way some other style would be applied is if the user overtly applies something else or copies text from another document which had a different style applied to it.

## There is No Off Button

I've heard many people tell me that they don't use styles in Word. That's impossible because you can't turn styles off and as described in the previous rule, Word applies them automatically. It's impossible to have text in a Word document (any version) to which a style is not applied.


## If You Don't Control Styles, They Control You

This is about as blunt as I can get. Styles will always win the formatting battle. All of the Direct Formatting in the world isn't going to change that. You're infinitely better off learning how to control styles so you aren't constantly struggling against them. They are completely controllable (as is Word in general), once you've learned how to use them.

## Every Document Has 247 Styles Built In

When you create a new document in Word, there are 247 styles already in the document although only a small subset might actually be used. We refer these built-in styles as "system" styles. To see all of these styles, you can either:





- Show all styles in the styles pane: Open the **Styles pane** (see page 207) → **Options button** → under **Select styles to show**: choose **All Styles** → click **OK**.
- View all styles in the Manage Styles dialog: Open the **Styles pane** (see page 207) → **Manage Styles button**  → **Edit tab**.

## You Can't Delete System Styles

While you can't delete the 247 styles built into every Word document, you can alter the formatting it produces to meet your needs.



## You Can Create New Styles

You can create new styles by using the New Style button at the bottom of the Styles task pane.

Depending upon your version of Word, it might look like this:  or like this: .

## The Style Inspector Makes All of This Much Easier

If you're not sure what style is being applied to text in your document, just follow these steps to find out:

1. Open the **Styles pane** (see page 207).
2. **Style Inspector button**  or .

A panel will open and show you the Paragraph formatting and Text level formatting.

## Direct Formatting Creates Layers (Which You Don't Want)

As explained above, every paragraph has a style already applied to it. This is most often the Normal style if someone didn't intentionally apply a different style.

Let's say that the Normal style were applied to a paragraph and its definition was Times New Roman, 12 point, fully justified. A user may decide that they don't like that formatting for the paragraph and want to change it to Arial, 11 point, left aligned. If they simply select the paragraph and apply direct formatting to make that change, the style (which you should think of as the underlying default for that paragraph) will remain Times New Roman, 12 point, full justified. The direct formatting applied by the user is a layer of formatting on top of the style. What the user should have done is modify the Normal style to be Arial, 11 point, left justified. However, most users are not aware that Word handles formatting like that.

Like a layer of paint, direct formatting can be scraped off to reveal the underlying default. This often happens to users by accident (and it's extremely annoying). If you've ever been editing a document and noticed that the formatting keeps shifting on you (changes in fonts, point size, or justification are common, for example), then your underlying style is probably in disagreement with the surface formatting layer that was created by direct formatting.

It's fine to have occasional direct formatting - for example you want the words *per stirpes* to be italicized in a paragraph. However, if you want the entire paragraph to be italicized, then you should use a style.

## You Can Scrape Off Direct Formatting

If you want to reveal whatever style-based formatting is beneath direct formatting, here are two shortcut keys to remember:

- **Strip Font Formatting:** Select the text → **Ctrl + Spacebar**.
- **Strip Paragraph Formatting:** Select the text → **Ctrl + Q**.
- **Strip all Formatting:** Select the text → **Home ribbon → Font group → Clear All Formatting button**. This will strip the selected text down to the Normal style.

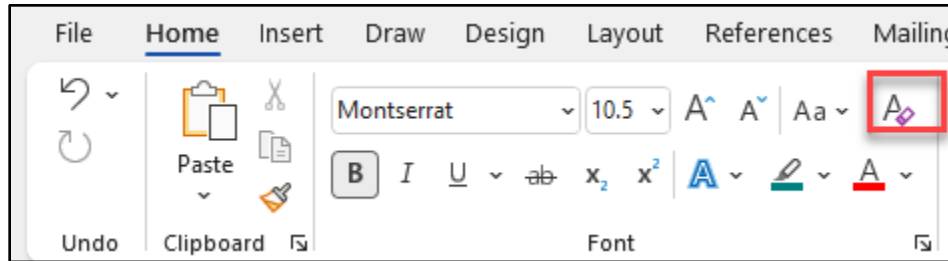


FIGURE 22-3

## Change Formatting by Modifying the Style Applied

Let's say you have 50 footnotes in your document, and you don't like how they look. There's a style called Footnote Text which Word automatically applies to every footnote. Therefore, you can change all of your footnotes at once by modifying the Footnote Text style. As soon as you change the style definition, every footnote will update its formatting automatically to match your changes assuming you didn't already apply direct formatting. If you had already selected each footnote and applied custom formatting (see discussion of Direct Formatting above), then that formatting will need to be removed to reveal the default style formatting beneath it (see previous rule).

## Use System Styles Whenever Possible

You'll save yourself a lot of time and energy if you simply use the styles Word provides and change them to format the text the way you would like. If you create a separate set of styles for each practice area or type of document, you end up with something that is difficult to keep track of.

On the other hand, if you consistently use the system (built-in) styles, then the style names will be the same from document to document, even though their formatting definitions can be completely differently in each document. Here's what we recommend:

1. If you have numbered paragraphs, always use the Heading styles (Heading 1, Heading 2, etc.) - there are 9 levels of them.
2. If you have un-numbered paragraphs like the one in Figure 22-4, then use the Body Text styles. Every document includes Body Text, Body Text 2 and Body Text 3. Of course, you can add Body Text 4, etc. if necessary.

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FIGURE 22-4

If you have a paragraph like the second one shown below, you would use Body Text 2 because the paragraph is moved 0.5" off the left margin. If I encountered another paragraph that was 1" off the left margin, then I would use Body Text 3.

(d) Information consisting of a combination of features that individually satisfy any of the exceptions described in clauses (a), (b) or (c), above, shall not be deemed to be excluded from the definition of Confidential Information unless the combination itself and its principles of operation satisfy one or more of such exceptions.

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FIGURE 22-5

3. For titles, there is a built-in style called "Title" which should be used.
4. For block quotes, use the built-in style called "Block Text" that should be used.

# CHAPTER 23

## APPLYING STYLES

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

If a document already has the styles you need set up correctly, you only need to know how to apply styles to your text to take advantage of them. Start by finding the list of styles to work from.

If the styles aren't set up the way you need, you'll need to modify them to meet your needs. See Chapter 26 on page 215 for instructions on how to modify styles.

### Determining How Styles are Being Used

Assuming you're working from an existing document, not a new blank document, it's best to first determine how styles are currently being used in the document. The easiest way to see how styles are used throughout the document at a glance is to use the Draft view. You can switch to Draft view from the **View ribbon** → **View group** → **Draft button**.

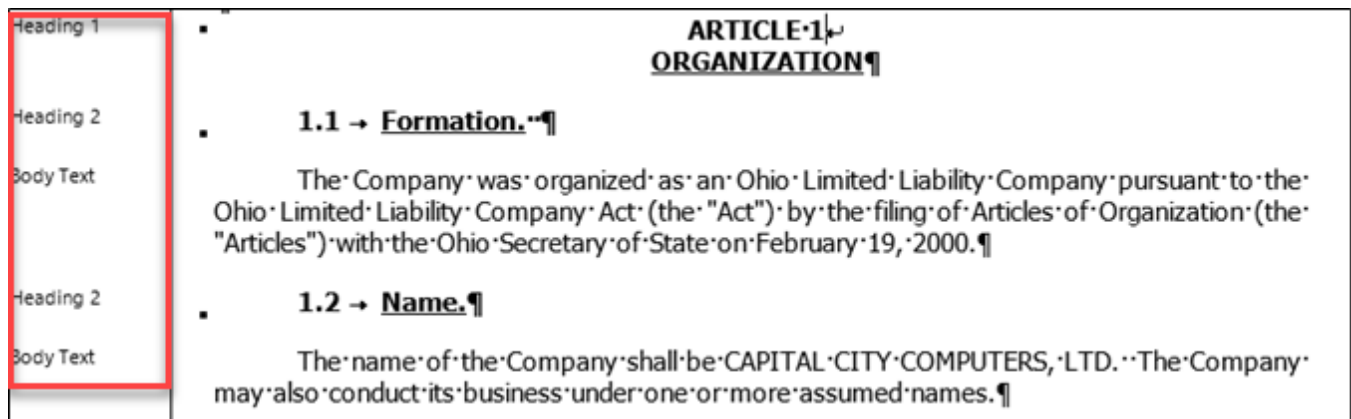


FIGURE 23-1

If you switch to Draft view and don't see the names of the styles to the left of the document text, you'll need to change a setting to show them. From the **File menu** → **Options** → **Advanced** → **Display**, set **Style area pane width in Draft and Outline views** to 1".

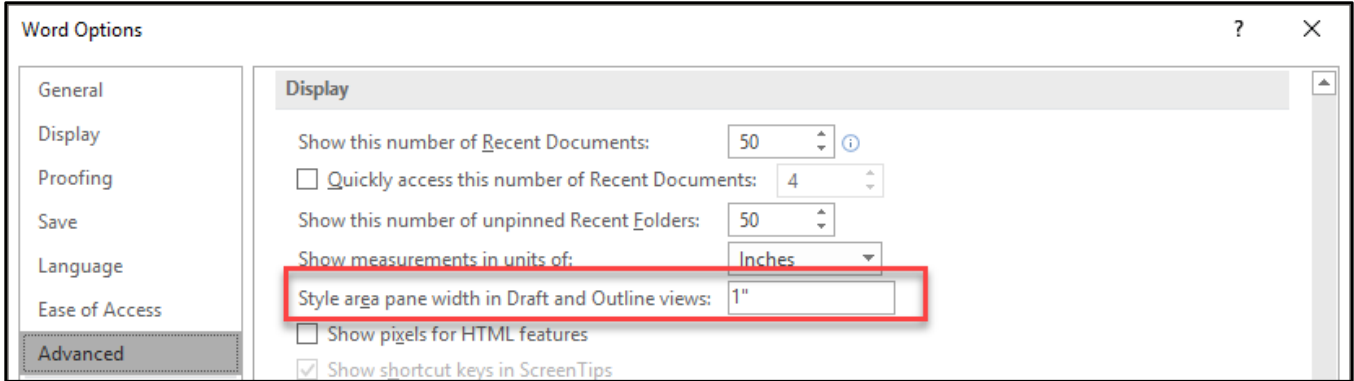


FIGURE 23-2

Once the styles are showing in Draft view, you can quickly skim through the document and see which style is applied to each paragraph.

If every or most paragraphs have "Normal" listed as their style, styles were not intentionally used when formatting this document. To fix the formatting, you'll need to apply the correct style to each paragraph (see below).

Once you have an idea of how styles are currently being used, you can switch back to the **Print Layout view** from the **View ribbon**.

## Finding Styles

Depending on how the document you're working with was set up, you'll need to apply styles from either the **Styles gallery** on the **Home ribbon** or the **Styles pane**. Different styles may appear in the gallery than appear in the pane. Most often, styles are set up to be used from the Styles pane because more styles can be seen at once in the pane.

### Styles Gallery

Some styles are shown in the **Home ribbon's Styles gallery**. While the Styles gallery provides easy access to styles, only a few styles can be shown on the Home ribbon without expanding the gallery.

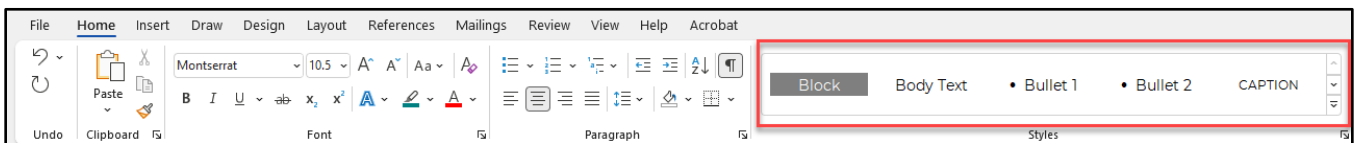


FIGURE 23-3

### Styles Pane

Most documents are set up to be formatted from the Styles pane. To open the Styles pane, click on the **Home ribbon** → **Styles launcher**.

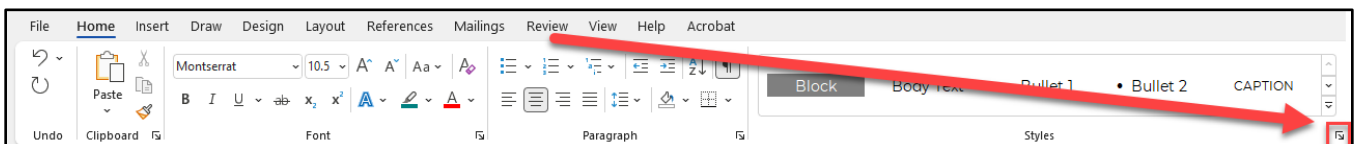


FIGURE 23-4

## Applying Styles

Once you can see the list styles available for use in the document, you can start applying styles to newly added or incorrectly formatted text.

### Styling Entire Paragraph(s)

To apply a style to an entire paragraph, click inside the paragraph. Then click on the desired style in the Styles gallery or Styles pane (see page 207). To apply the same style to multiple paragraphs at once, you can select multiple paragraphs and then click on the name of the desired style.

### Styling Words or Phrases

To apply a style to part of a paragraph, select the text to be formatted, then click on the desired style in the Styles gallery or Styles pane (see above).

# CHAPTER 24

## STYLES PANE

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It's easier to work from the Styles pane than the Styles gallery. You can see more styles at once in the Styles pane. To show the Styles pane, click on the **Styles launcher** on the **Home ribbon** (see page 207). You can control where the Styles pane is located, how the styles appear in it, which styles appear in it, and the order of the styles in it.

### Dock the Styles Pane

The first time you open the Styles pane, it'll be floating on top of the Word window. You can dock it to the right-hand side of your document by double-clicking on the top of the Styles pane.

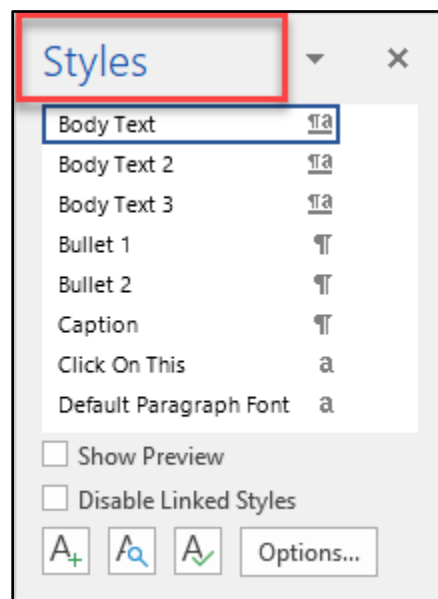


FIGURE 24-1

## Show Style Previews

By default, the list of styles in the Style pane is an unformatted list. Check the box to **Show Preview** at the bottom of the Styles pane to see a preview of each style's formatting attributes (similar to how styles appear in the Styles gallery).

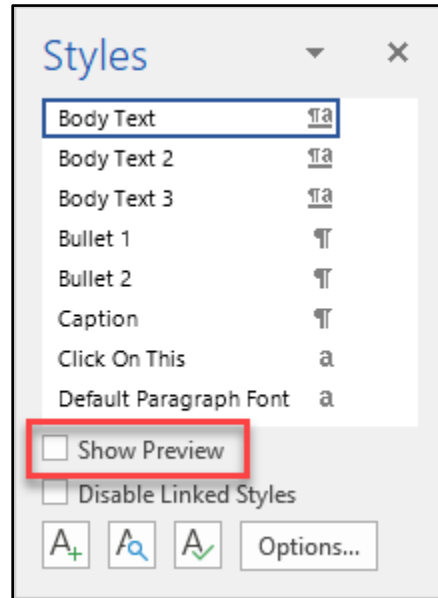


FIGURE 24-2

## Customizing the Styles Pane

You can customize the Styles pane to control which styles appear in it and the order in which they appear.

### Style Pane Options

Start by setting your **Style Pane Options** from the **Options... button** at the bottom of the Styles pane.

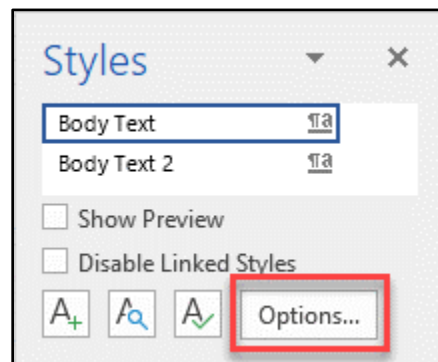


FIGURE 24-3

Set **Select styles to show** to **Recommended**. You can control which styles are "recommended" and, therefore, which styles appear in the Styles pane (see below).

It is easiest to set **Select how list is sorted** to **Alphabetical**. If you don't want to show the styles in alphabetical order, you can control the order by setting it to **As Recommended**.



Uncheck all three boxes under **Select formatting to show as styles**. Checking these boxes causes fake styles to appear in the styles pane and makes it harder to find the styles you need.

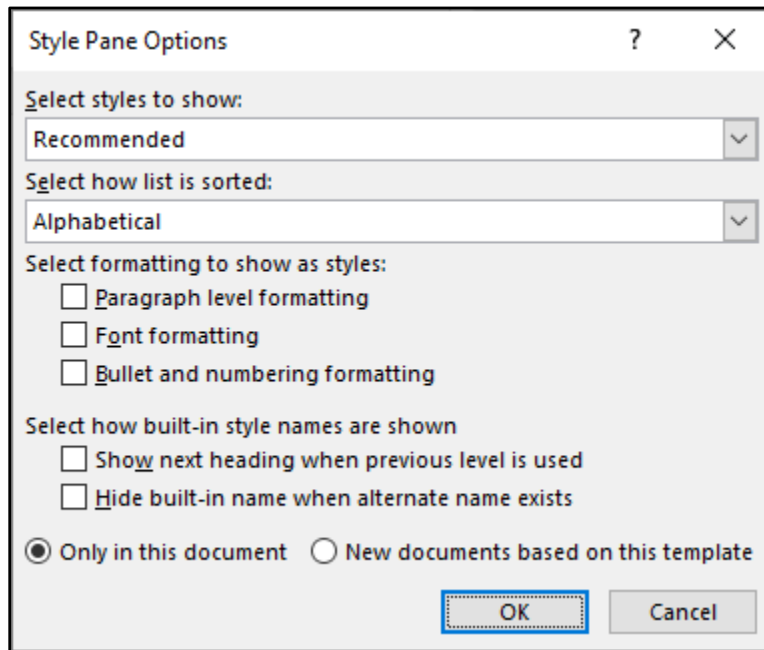


FIGURE 24-4

## Showing/Hiding Styles

Once the Style Pane Options are set to show recommended styles, you'll need to tell Word which styles to show/hide. We'll start by assigning all styles the same value and hiding them. Assigning them the same value will ensure that they appear in alphabetical order throughout the application. It's typically easiest to hide all styles and then select the ones you want to show rather than going through the entire list looking for styles to hide as well as styles to show.

1. Click on the **Modify Styles button** at the bottom of the **Styles pane**.

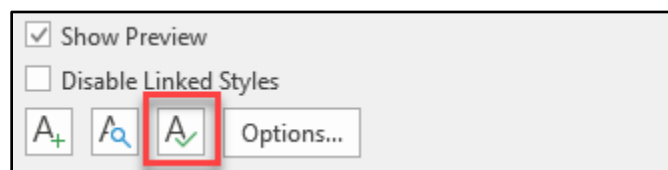


FIGURE 24-5

2. Click on the **Recommend tab**.
3. Change the **Sort order** to **Alphabetical** and uncheck **Show recommended styles only**.

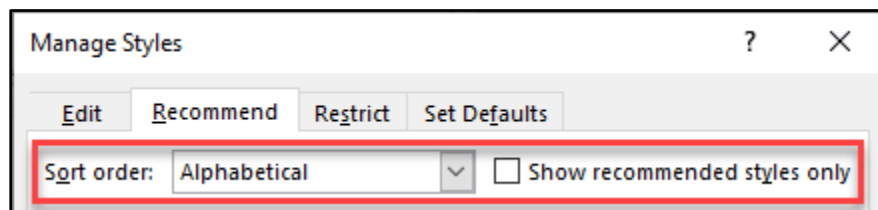


FIGURE 24-6

4. Click on the **Select All button**.

5. While the entire list of styles is select, click on the **Assign Value... button**.
6. Enter **1** and click **OK**. This ensures that all styles will appear in the Styles pane and various dropdown menus in alphabetical order.

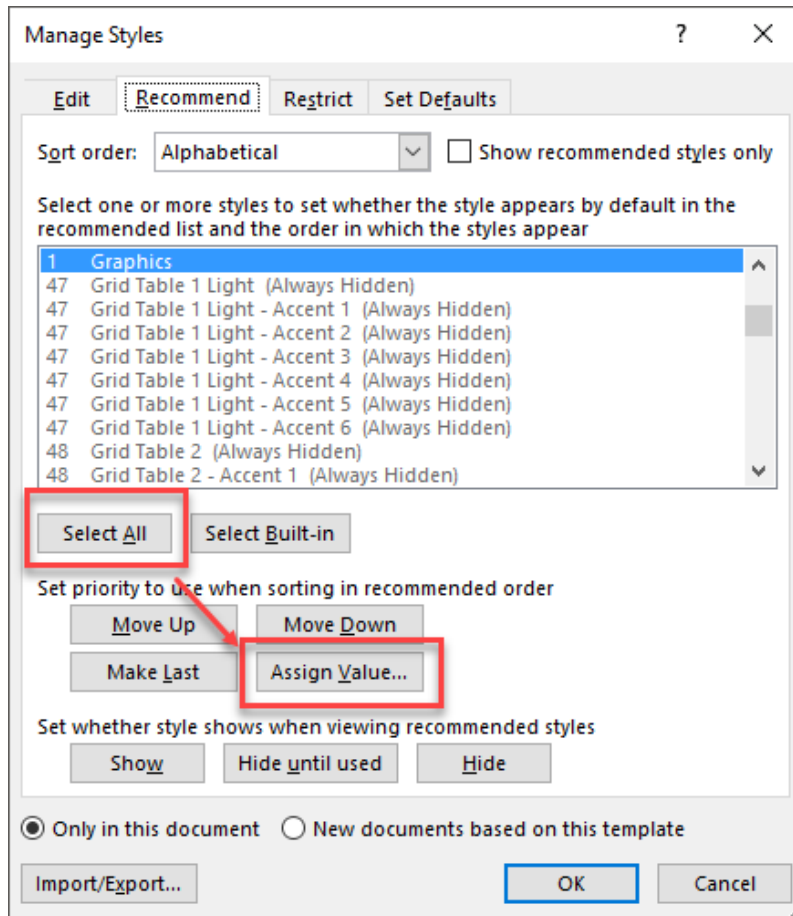


FIGURE 24-7

7. While all styles are selected, click on the **Hide button**. If your Style Pane Options are set to show recommended styles this will make all styles disappear from the Styles pane.
8. Select each style you want to show in the Styles pane, and click on the **Show button**.
9. Click **OK**.

# CHAPTER 25

## STYLES GALLERY

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Most people prefer to work from the Styles pane, rather than the Styles gallery, because you can easily see more styles in it. That said, if you prefer to work from the Styles gallery or use Quick Style Sets to import styles into documents (see Chapter 28 on page 229), you'll want to customize the Styles Gallery.

### Expanding the Styles Gallery

The **Styles gallery** is available on the **Home Ribbon** in the **Styles group**. You can expand the gallery by click on the drop-down arrow in the bottom right hand corner.

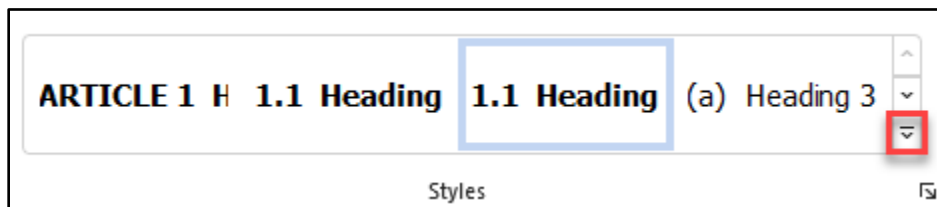


FIGURE 25-1

The expanded gallery may show additional styles.

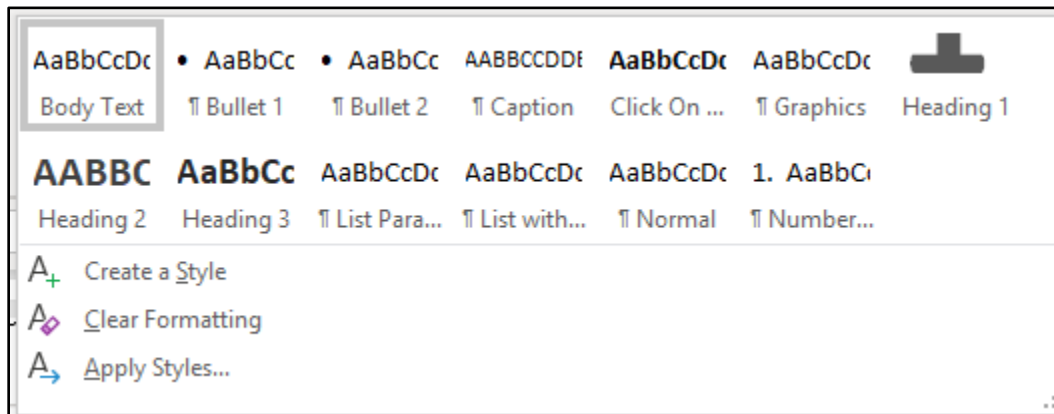



FIGURE 25-2

### Removing Styles from the Styles Gallery

To remove a style from the gallery, right click on the style in the gallery and select **Remove from Style Gallery**.

## Adding Styles to the Styles Gallery

To add styles to the Style gallery:

1. Open the **Styles pane (Home ribbon ► Styles launcher)**.
2. If the style appears in the Styles pane, right-click on it and select **Add to Style Gallery**.
3. If the style does *not* appear in the Styles pane, click on the **Modify Styles button**  at the bottom of the **Styles pane**.
4. On the **Edit tab**, select the style.
5. Click on the **Modify... button**.
6. Check the box to **Add to the Styles gallery**.

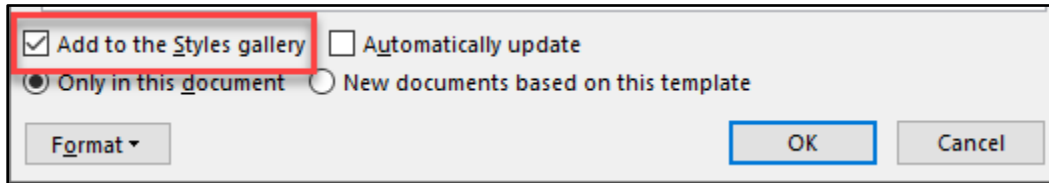


FIGURE 25-3

# CHAPTER 26

# CREATING AND MODIFYING STYLES

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## Types of Styles

There are five types of styles in Word. When using Word's built-in styles (see page 202), the type of style is already selected for you. When you create new styles, however, you'll need select the type of style. Once the style is created, you can't change the style type.

### Paragraph

Paragraph styles apply both paragraph and font formatting to the entire paragraph. Click into a paragraph and apply the paragraph style to the entire paragraph.

### Character

Character styles apply formatting to individual characters only. Click anywhere in a word (or select text) and apply the style to the word(s) you selected.

While some believe that every instance of unique formatting requires a style (such as a character style to make a word bold), it is typically unnecessary.

### Linked

Linked styles have characteristics of both character and paragraph styles. If you just click into a paragraph and apply a linked style, it formats the entire paragraph. If you select part of a paragraph and apply a linked style, it will apply only to what you've selected.

### Table

Table styles apply border, shading, alignment, and character formats to tables.

### List

List styles apply outline number and bullet formats to lists. These are discussed in detail in Chapter 27 starting on page 222.

## Styles Based on Other Styles

Styles can be based on other styles. When a style is based on another style, changes to the base style cascade to the styles based on them as long as the formatting matches.

For example, let's assume that the style Body Text is based on the Normal style and both are set to Calibri 11 pt. If you change Normal to Times New Roman 12 pt, Body Text will automatically update to Times New Roman 12 pt.

If, however, Body Text is based on Normal, but they are set to different fonts (Normal is set to Calibri 11 pt and Body Text is set to Arial 10 pt), changing Normal's font to Times New Roman's 12 pt will not change Body Text's font.

This behavior is the reason that you always want to start by ensuring that the Normal style (the default formatting for your document) is set correctly first with your preferred font and paragraph settings. Then, base every other style on Normal. See more below.

While it may seem like a good idea to based Heading 2 off Heading 1 or Body Text 2 off Body Text 1, you'll generally save yourself a headache down the road by basing all styles off of Normal. For example, let's say you based Heading 2 off Heading 1. You format both of them to be bold. Later, you decide to underline Heading 1 instead of making it bold. Changing Heading 1 to not bold and underlined will also change Heading 2, forcing you to switch Heading 2 back to how it was originally formatted.

## Default Formatting: Normal

Every document has a default style that contains the document's default formatting. That style is called the Normal style. In Chapter 11, we discussed how to change your default font and paragraph settings. When you changed those settings, you were, in fact, changing the Normal style for the template upon which blank documents are based. You can also edit the Normal style like any other style, as discussed below.

Before you start modifying any other styles or creating new styles, start by setting up the Normal style with your default font and paragraph settings. The formatting of other styles will be based on the formatting contained in the Normal style, so you need to get your Normal style right first.

## Blank Documents

If there's no text in your document, changing the Normal style will change the default for the document without issue.

## Documents with Existing Text

If your document already has text in it, changing the formatting in the Normal style may or may not affect the text in your document. This may occur either because the document has layers of Direct Formatting (see page 203) applied over top of the default formatting or because the text was formatting with a different style.

To determine which style is applied to each paragraph, use Draft view (see page 206). If the formatting of the text does not match the style applied, you'll need to strip off the layers of Direct Formatting (see page 203) or reapply the style (see page 208).

## Modifying Existing Styles

Before modifying any other styles, first ensure that the Normal style is set with your preferred default formatting. Then, you can modify other existing styles.

There are two ways to modify existing styles. You can either change in the settings from Modify Style dialog or you can update a style to match a selection of text.

## Modify Styles Dialog

To modify a style using the Modify style dialog:

1. Open the **Styles pane (Home ribbon ► Styles launcher)**.
2. Right click on the style to modify and select **Modify...**
3. For **Style based on**, select **Normal**.

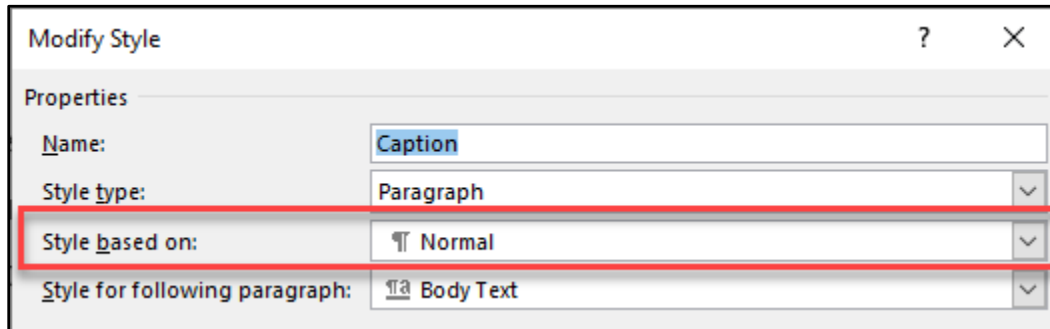


FIGURE 26-1

4. Under the **Format button** select **Font...**
5. Select the desired font formatting.
6. Click **OK**.
7. Under the **Format button** select **Paragraph...**
8. Select the desired paragraph formatting.
9. Click **OK** and **OK** again.

## Update to Match Selection

To modify a style using Update to Match Selection method, you'll first format text using Direct Formatting and then update the style to match the Direct Formatting. Either start with text formatted with the style to be modified or formatted with Normal.

If you start with text formatted with the style to be modified, the **Style based on setting** will *not* be changed when you update the formatting. If you start with text formatted with a different style, the **Style based on setting** will be changed to whichever style was applied to the text. See page 215 for a more detailed explanation of this setting.

If you only need to make a small change a style, start by modifying text formatted with that style. If you need to make a more substantial change, you may want to start by formatting text that has the Normal style applied.



Once the text is formatted:

1. Open the **Styles pane (Home ribbon ► Styles launcher)**.
2. Right click on the style to modify and select **Update to Match Selection**.

## Creating New Styles

If none of the existing styles meet your needs, you can create new styles:

1. Open the **Styles pane (Home ribbon ► Styles launcher)**.

2. Clear all formatting from a paragraph using the **Clear All Formatting button**  on the **Home ribbon**, in the **Font group**.
3. Use Direct Formatting to apply font and paragraph formatting.
4. Click on the **New Style button**  at the bottom of the **Styles pane**.
5. Give the style a meaningful name.
6. **CRITICAL:** Select the desired **Style type**. Once you click OK, this *cannot* be changed. Paragraph is fine for most styles.
7. Click **OK**.

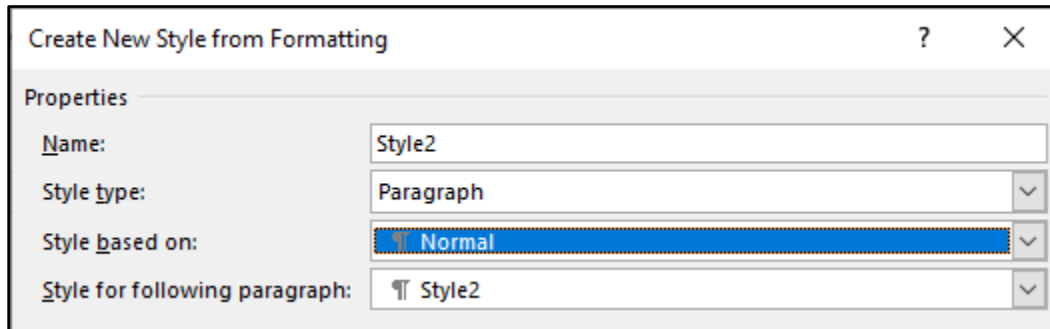


FIGURE 26-2

## Style for Following Paragraph

When you insert a hard return (hit the enter/return key) at the end of a paragraph, a style is automatically applied to the new paragraph. You can tell Word which style you want to be applied to the new paragraph on a style-by-style basis.

For example, if the text formatted as Heading 1 typically is followed by text that needs to be formatted as Heading 2, you can tell Word that when you hit enter at the end of a Heading 1 paragraph to automatically apply the Heading 2 style to the new paragraph. If you need a different style, you can always apply a different style to the new paragraph.

Alternatively, the text formatted as Body Text may typically be followed by another Body Text paragraph. You can set Body Text to be followed by Body Text.

Generally, you don't want styles followed by Normal because most paragraphs in your document will be formatted with a style other than Normal. If the formatting for the next paragraph is frequently different, it's better to have the right style applied only occasionally rather than the wrong style (Normal) always be applied.

To change this setting:

1. Open the **Styles pane (Home ribbon → Styles launcher)**.
2. Right click on the style to modify and select **Modify...**
3. For **Style for following paragraph**, select the desired style for the paragraph following this style.



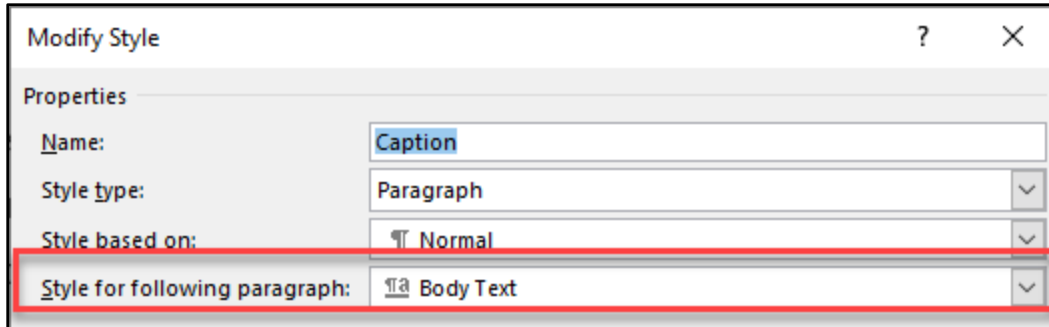


FIGURE 26-3

## Styles and the Navigation Pane

Paragraphs formatted with heading styles automatically show up in the Navigation pane (see page 200), making it easy to quickly navigate through your document. If you want additional styles to show in the Navigation pane, you need to change the Outline level paragraph setting for that style from "Body Text" to a numbered level:

1. Open the Styles pane (**Home ribbon** → **Styles launcher**).
2. Right-click on the style to modify and select **Modify...**
3. Click on the **Format button**.
4. Click on **Paragraph...**
5. Select the desired **Outline level**.



FIGURE 26-4

## Assigning Keyboard Shortcuts to Styles

You can assign each style a keyboard shortcut. You can then apply the style using the keyboard shortcut regardless of whether the Styles pane is open or the style is showing the Styles Gallery.

To assign a keyboard shortcut to a style:

1. Open the **Style pane** (**Home ribbon** → **Styles launcher**).
2. Right-click on the style and select **Modify...**
3. Click on the **Format button** and select **Shortcut key...**
4. Click in the **Press new shortcut key box**.
5. Press the desired shortcut keys on your keyboard.

- Click on the **Assign** button.

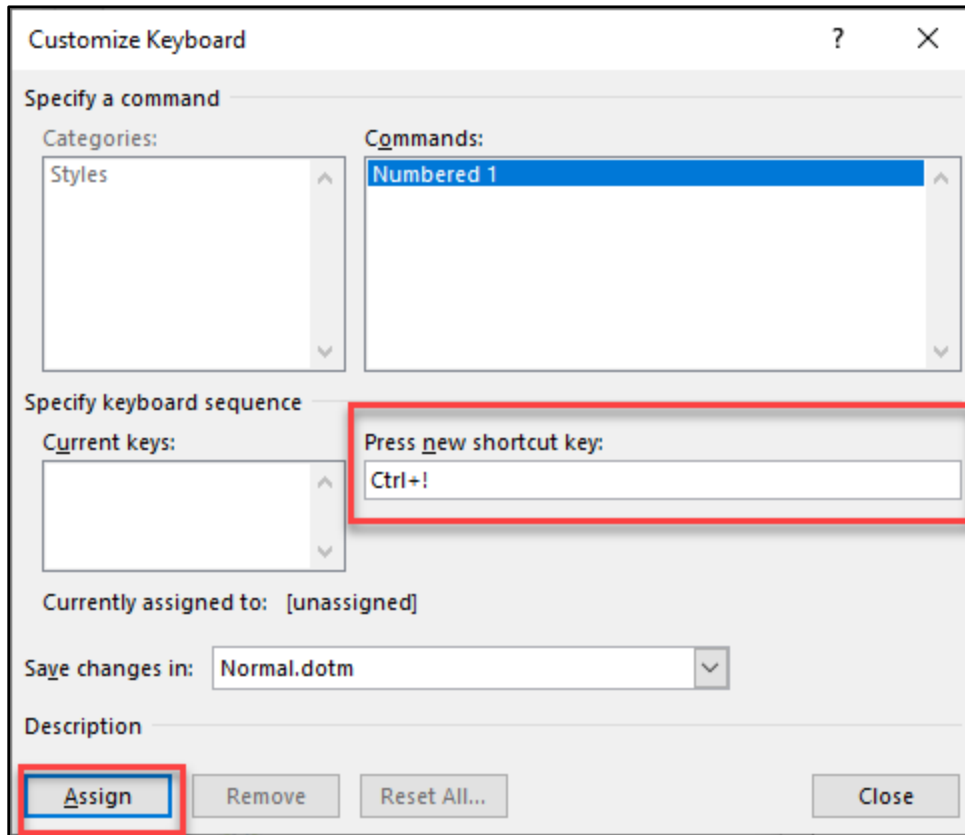


FIGURE 26-5

## Don't Automatically Update Styles

There is a setting in the **Modify Style dialog** to **Automatically update** the style. You want to leave this box unchecked. When it's checked, changes you make to paragraphs formatting with that style (such as adding bold) can modify the styles' formatting and wreak havoc on your document's formatting.

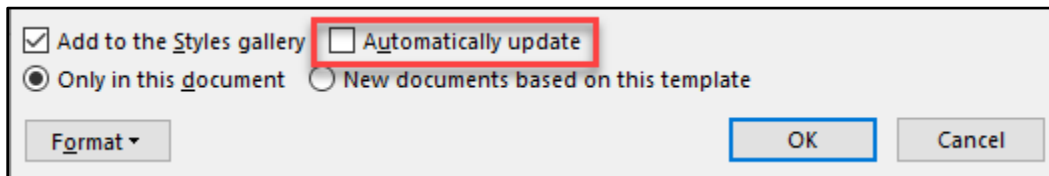


FIGURE 26-6

## Styles and Templates

### Making Your Styles Available in the Future

If you want all of those great styles to be automatically available in future documents you create, modify each Heading style and tick the **Add to template box**. That will save your style settings in your Normal.dot template. Next time you create a new file, your outline numbering settings will be available.

## Creating a Template to Hold the Styles

You can create a new template just for outline numbered documents. Setup the styles and numbering the way you would like, delete all the text and click **File menu** ➔ **Save As**. At the bottom of the **Save As dialog**, in the **Save as type box**, change the setting from **Word Document** to **Word Template**. This will save the file as a document template, not a document. The next time you click **File menu** ➔ **New** your new template will be available, complete with your outline numbering settings.

# CHAPTER 27

# STYLES AND AUTOMATIC PARAGRAPH NUMBERING



Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

Note that this is difficult and somewhat confusing. However, if you get things setup correctly, it's virtually impossible to screw up your paragraph numbering or anything else related to formatting in your document. Follow these steps closely and eliminate future annoyances and frustrations.

## Key to Success

The key here is to use styles to control the paragraph numbering and the formatting of the text that follows the numbering. There are good reasons for using Word's built-in Heading styles (named Heading 1, Heading 2, etc.) so that's what we're going to do here.

Things to remember:

- Notwithstanding anything stated previously in this manual, DO NOT USE the **Numbering**  or **Bullet**  toolbar buttons. They'll only cause you problems.
- Styles must be applied to your outline levels, and we strongly recommend using Word's built-in Heading styles (Heading 1, Heading 2, etc.). Modify the built-in Heading styles to create the font, paragraph and other formatting you want.

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 paragraph 1.1.

### ARTICLE 1 ORGANIZATION

1.1. **Formation.** The Company was organized as an Ohio Limited Liability Company pursuant to the Ohio Limited Liability Company Act (the "Act") by the filing of Articles of Organization (the "Articles") with the Ohio Secretary of State on February 19, 2000.

FIGURE 27-1

## Steps to Automatically Numbering Paragraphs

### STEP 1 - Modifying/Creating Styles for Each Level

Follow the steps from Chapter 26 starting on page 215 to modify the heading styles or create your own styles for each level of your outline. You'll need to modify both the font and paragraph settings to meet your needs, other than the paragraph indents.

You do not need to modify the paragraph indent settings because the numbering scheme you apply to your styles will take care of that. Leave left and right indents at 0" and special at none:

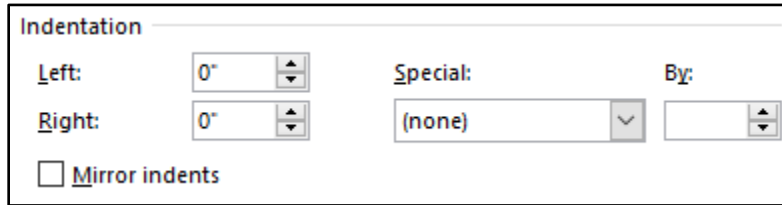


FIGURE 27-2

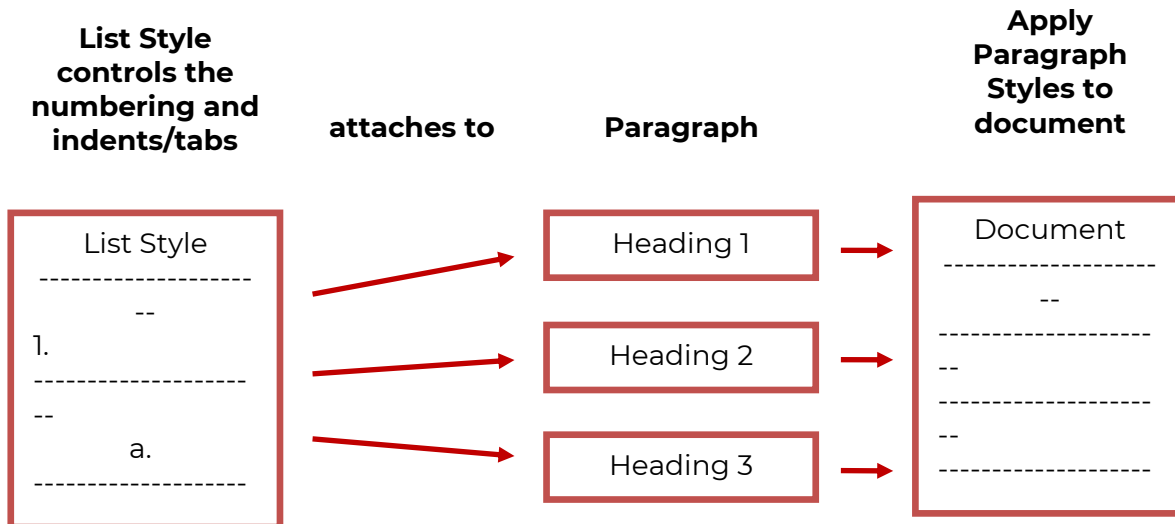
Don't forget to click the **Line and Page Breaks** tab and ensure that **Keep With Next** and **Keep Lines Together** are set appropriately (see page 161).

If you aren't using the heading styles, ensure that the paragraph **Outline level** is set to the correct outline level (see page 219).

## STEP 2 - Creating Your Outline Numbering

### Step 2a - Creating the List Style

List styles are used to tie outline numbering to styles. Once you create the paragraph numbering within the list style, the list style can then be attached to the paragraph style. The process looks something like this:



1. Create a new list style by clicking the **Home ribbon** → **Paragraph group** → **Multilevel list button**  → **Define New List Style**.

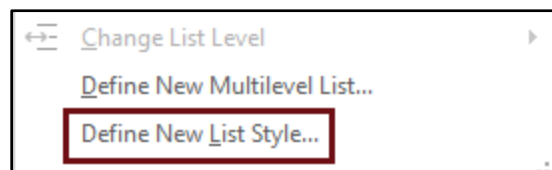


FIGURE 27-3

2. Give the list style a name that is meaningful to you.

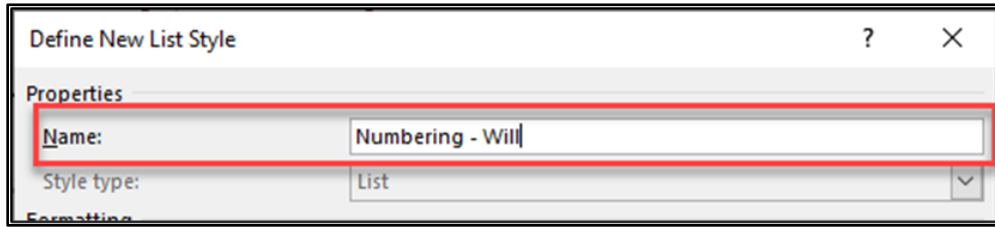


FIGURE 27-4

3. Click the **Format** button and select **Numbering...**

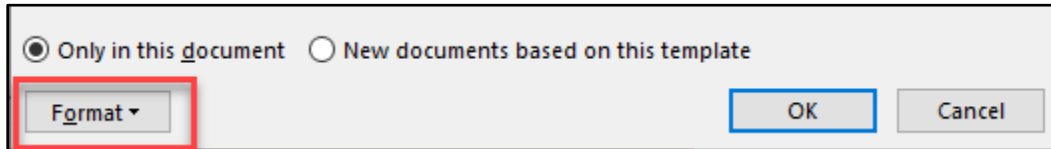


FIGURE 27-5

4. Click on the **More >>** button to reveal several important settings.

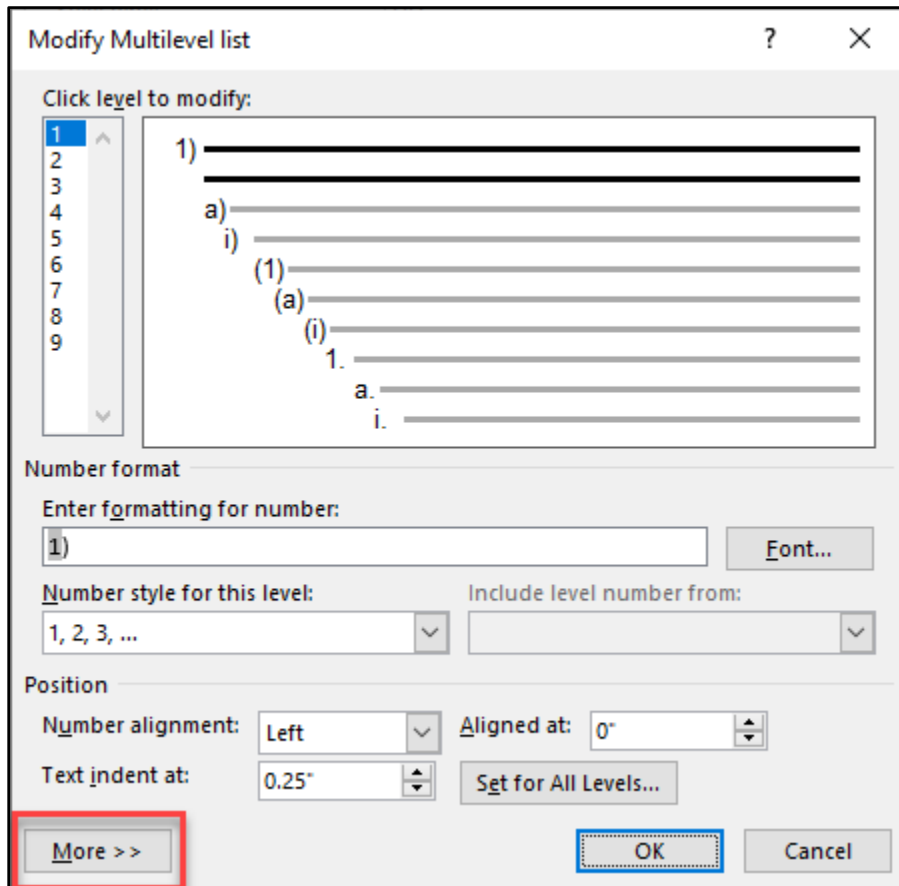


FIGURE 27-6

## Step 2b - Setting Up Outline Levels

From the **Modify Multilevel list dialog**, repeat the steps below for each level of the outline.

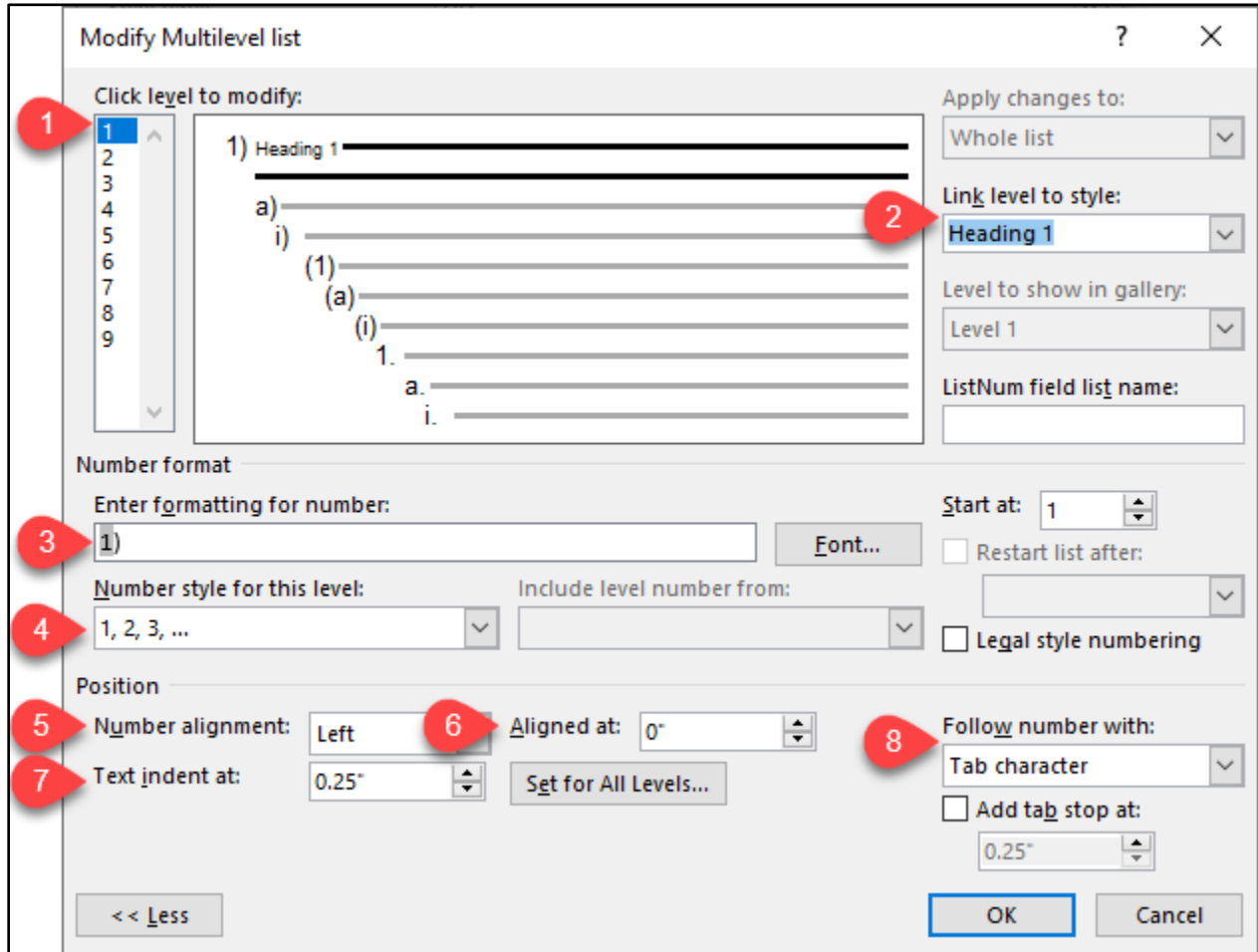


FIGURE 27-7

1. Under **Click level to modify**, select the outline level to modify. Start with level 1 and work your way down, one level at a time.
2. Under **Link level to style**, select the style (most often, level 1 is linked to Heading 1 and level 2 is linked to Heading, etc.). If you don't see this setting, click the **More >> button**.
3. Delete the text under **Enter formatting for this number**.
4. Select the desired number/letter/bullet format under **Number style for this level**. Manually type any other characters such as periods and parentheses under **Enter formatting for number**. Anything manually typed will *not* change from paragraph to paragraph. If you manually type a "1", every paragraph will be numbered with that "1."
5. Set **Number alignment** to **Left**. Even if the paragraph will be centered, set this to left.
6. **Aligned at** controls how far from the left margin the number will be placed on the page.
7. **Text indent at** controls how far from the left margin the subsequent lines of text will appear.

8. Use **Follow number with** to automatically follow the number with a tab character, space, or nothing. Typically, you'll want to follow your number with a tab to ensure consistent spacing from one paragraph to the next.
9. Repeat the steps above for each outline level.


### STEP 3 - Applying Styles to Your Paragraphs

Apply the heading or other styles to each paragraph in your document. See Chapter 23 on page 206. The paragraphs will be automatically numbered as the styles are applied.

### STEP 4 - Modifying the Outline

If you later need to modify the outline numbering or formatting for numbered paragraphs, you need to modify the styles. Modify the heading or other applied style using the instructions from Step 1 above.

If you need to modify the numbering or indents, you'll need to modify the list style. There are two ways to modify the list style:

1. Click on the **Home ribbon** → **Paragraph group** → **Multilevel list button**  → right-click on the list style and select **Modify**.
2. Click on the **Manage Styles button** in the **Styles Pane (Home ribbon** → **Styles launcher)**. Find the style in the list of styles in the **Edit tab** and click the **Modify button**.

## Legal Style Numbering

Legal documents often incorporate the number of a preceding outline level into the numbering for subsequent paragraphs (for example, paragraphs 1.1 and 1.2 under Article 1).

To set up legal style numbering using a list style, from the **Modify Multilevel List dialog**:

1. Under **Include level number from**, select the outline level to be included. Most often, this will be level 1.



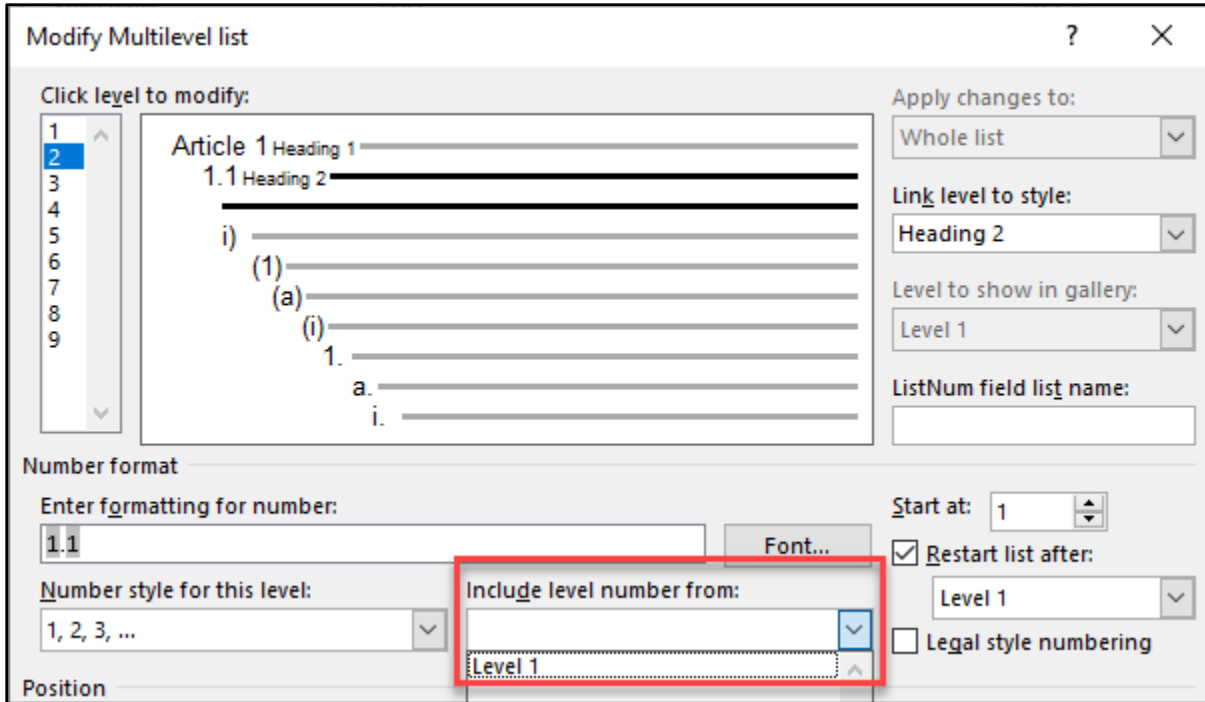


FIGURE 27-8

2. If the number to be included isn't formatted as "1, 2, 3", check the Legal style numbering box to modify how the number appears when it is included for subsequent levels.

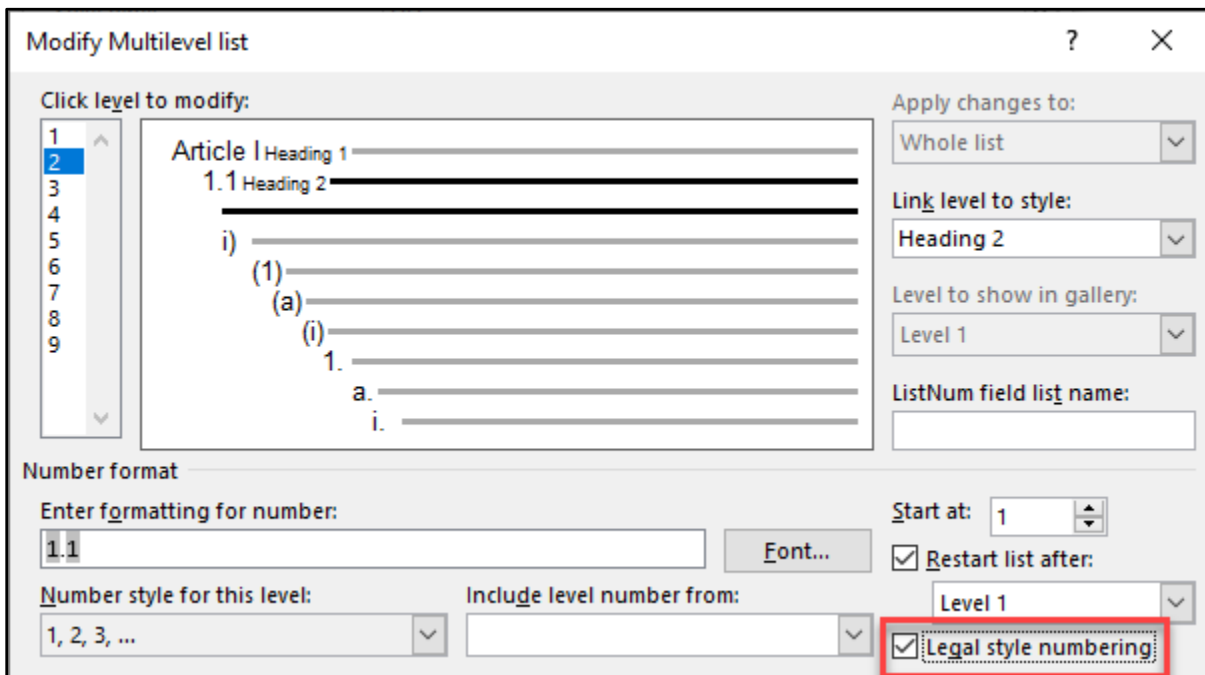


FIGURE 27-9

## Separating Numbers from Text

Sometimes, you need the paragraph number on a different line from the rest of the paragraph. See the example below:

**ARTICLE 1  
ORGANIZATION**

1.1. **Formation.** The Company was organized as an Ohio Limited Liability Company pursuant to the Ohio Limited Liability Company Act (the "Act") by the filing of Articles of Organization (the "Articles") with the Ohio Secretary of State on February 19, 2000.

To accomplish this, use a line break (Shift + Enter) to force the text following the number on a different line without creating a new paragraph.

# CHAPTER 28

## IMPORTING STYLES

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Styles are stored inside each document. If you use templates, you can store styles inside the templates and all new documents based on those templates will contain the same styles. However, existing documents will be unaffected by the creation and modification of styles elsewhere. Therefore, it can be helpful to import existing styles into other documents.

### Methods of Importing Styles

There are two different ways to import styles into documents: using the Organizer and Quick Style Sets.

#### Quick Style Sets

Quick Style Sets allow you to drop a whole set of customized styles into a document in 3 clicks, but they do *not* include list styles. They also *only* include styles shown in the Styles gallery. See Chapter 25 on page 213 for instructions on how to add or remove styles from the Styles gallery.

#### Organizer

Importing styles with the Organizer takes a few more clicks, but you can import list styles with it. You can also import any styles with it, not just styles shown in the Styles gallery.

### Quick Style Sets

#### Creating Quick Style Sets

To create a new Quick Style Set:

1. Customize and/or create the styles you want in any document.
2. Remove the styles you don't want to include in the set from your **Styles gallery** and add the ones you want to include (see Chapter 25 on page 213).
3. Click the **Design ribbon** ► down arrow on the right edge of the **Style Sets gallery**.

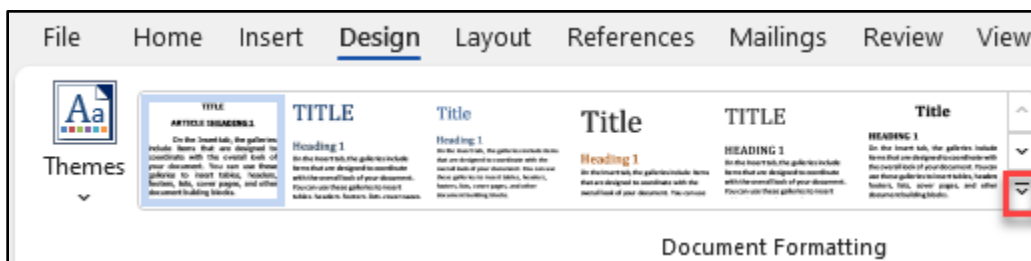


FIGURE 28-1

4. Click **Save as a New Style Set...** at the bottom of the next dialo.
5. Give it an appropriate name.
6. Click **Save**.

## Where Quick Style Sets are Stored

The foregoing process will create a template in a folder which contains your new Style Set. The location is likely:

C:\users\[your username]\AppData\Roaming\Microsoft\QuickStyles

## Applying Quick Style Sets

To import styles into a document using a Quick Style Set:

1. Click the **Design ribbon** ► down arrow on the right edge of the Style Set gallery:



FIGURE 28-2

2. Under **Custom**, select the desired Quick Style Set.


The Styles will be imported into your document.

## Sharing Quick Style Sets

As described above, Quick Style Sets are stored as templates on each user's C:\ drive. Therefore, you can take a Quick Style Set that you've created and copy it into that folder on other users' computers and they'll have instant access to those same sets.

## Organizer

The Organizer will allow you to import list styles and styles not shown in the Styles gallery. To copy styles into an open document using the Organizer:

1. Open the Styles pane (**Home ribbon ► Styles launcher**).
2. At the bottom of the Styles pane, click on the **Manage Styles button** .
3. Click the **Import/Export... button** in the lower, left-hand corner of the dialog.
4. If the styles you want are stored in your Normal (default) template, skip to step 7. Otherwise, click on the **Close File button** on the right-hand side.

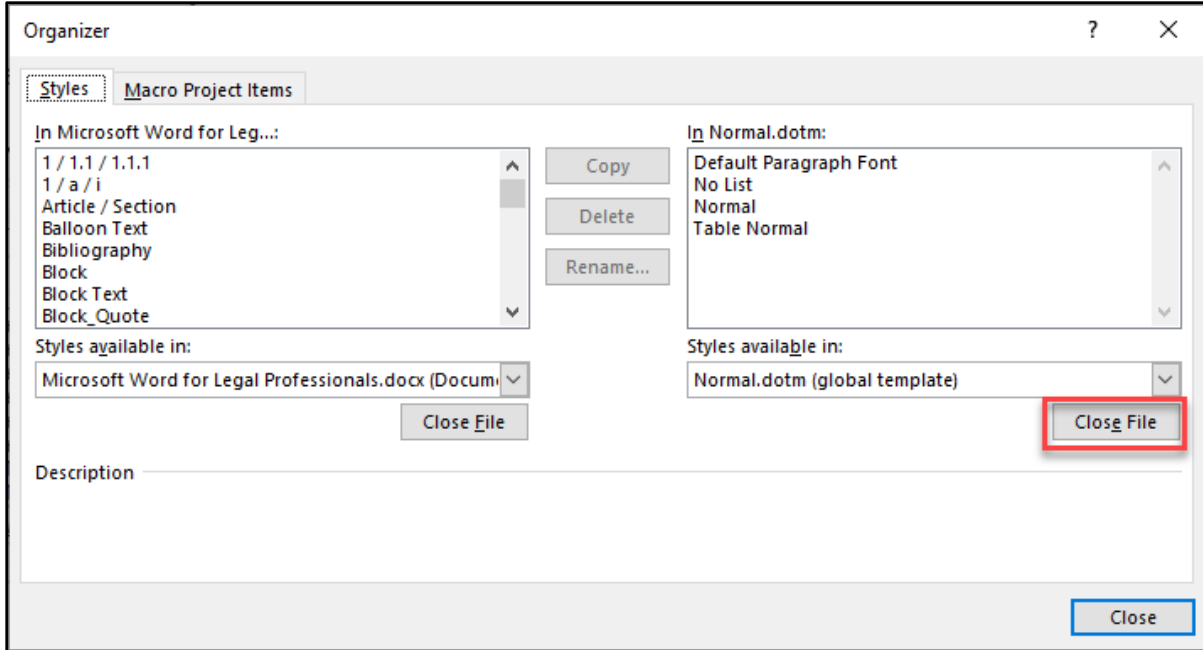


FIGURE 28-3

5. Click on the **Open File...** button.

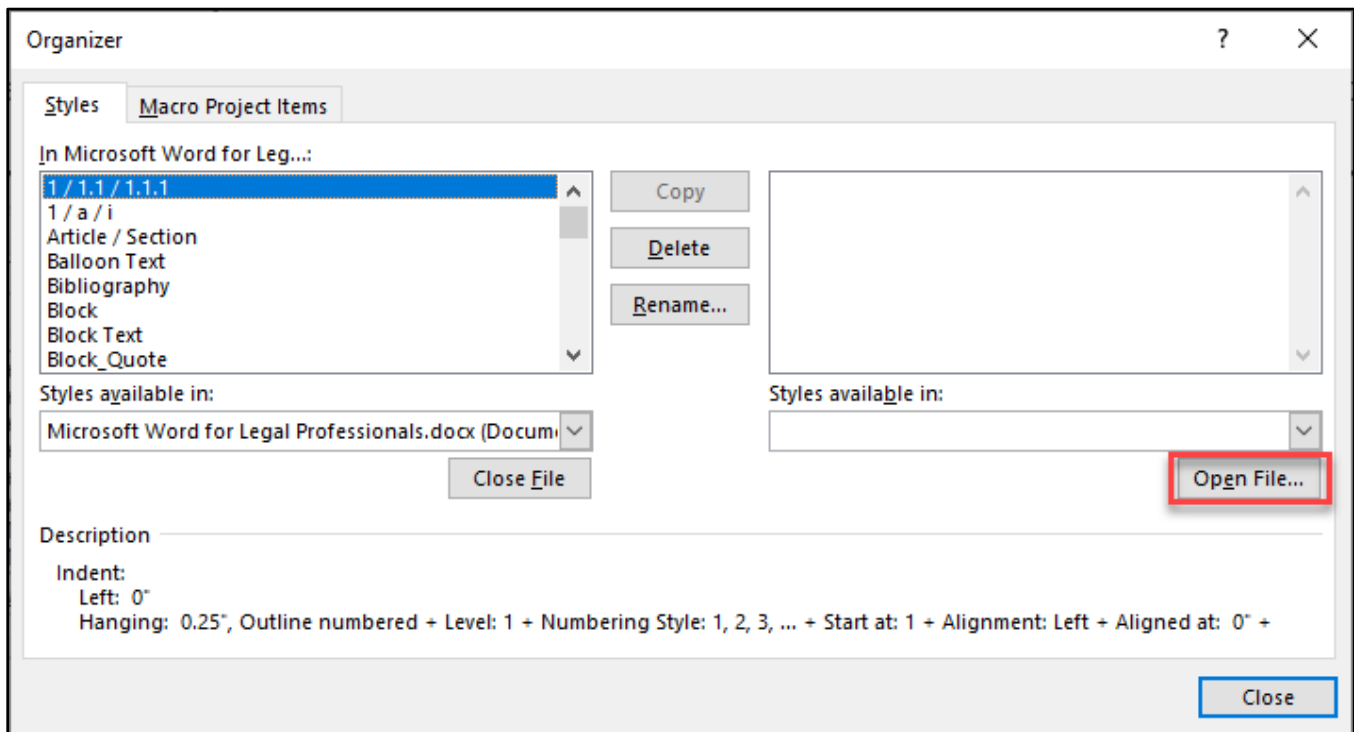


FIGURE 28-4

6. If the file that contains the styles to import isn't a template, click on the file type dropdown and select the correct file type or All Files.

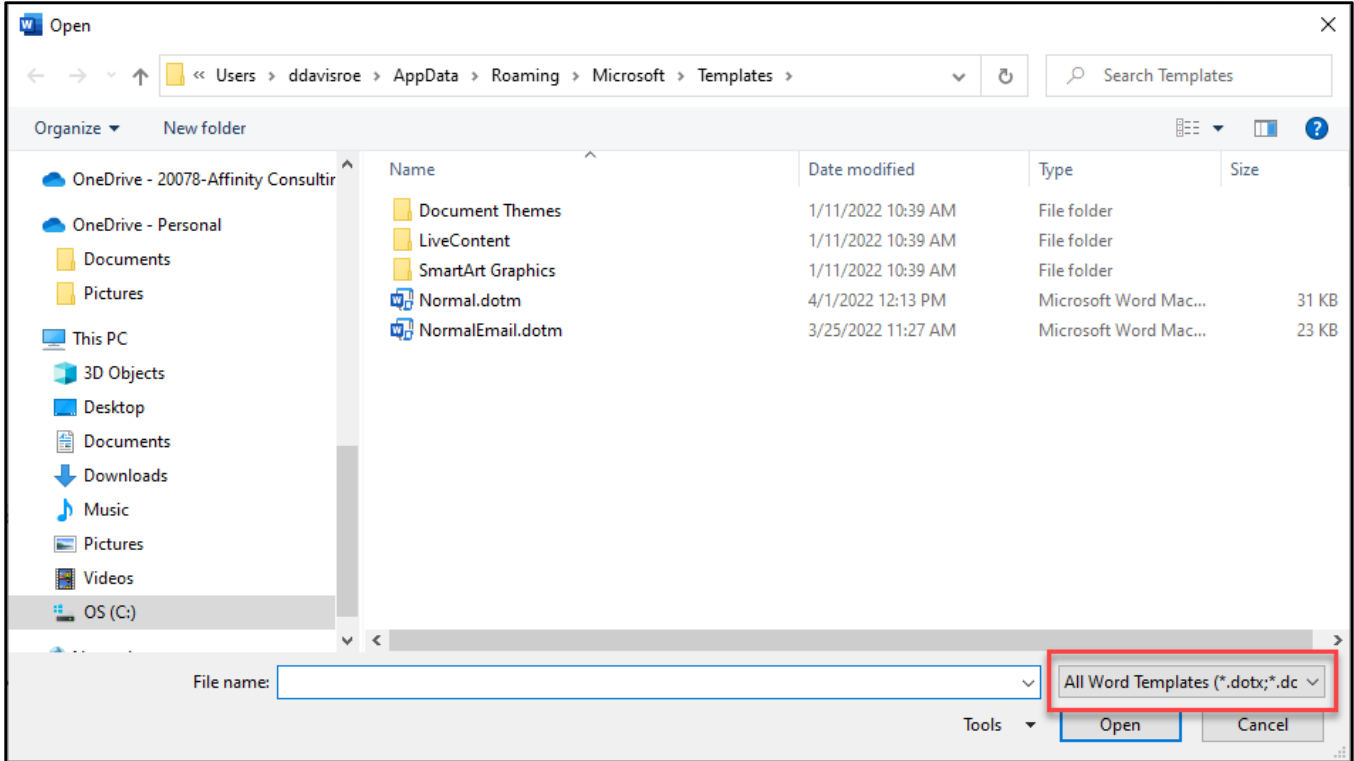


FIGURE 28-5

7. Select the styles to copy on the right-hand side. Use CTRL or SHIFT click to select multiple styles at once.
8. Click the **Copy** button.

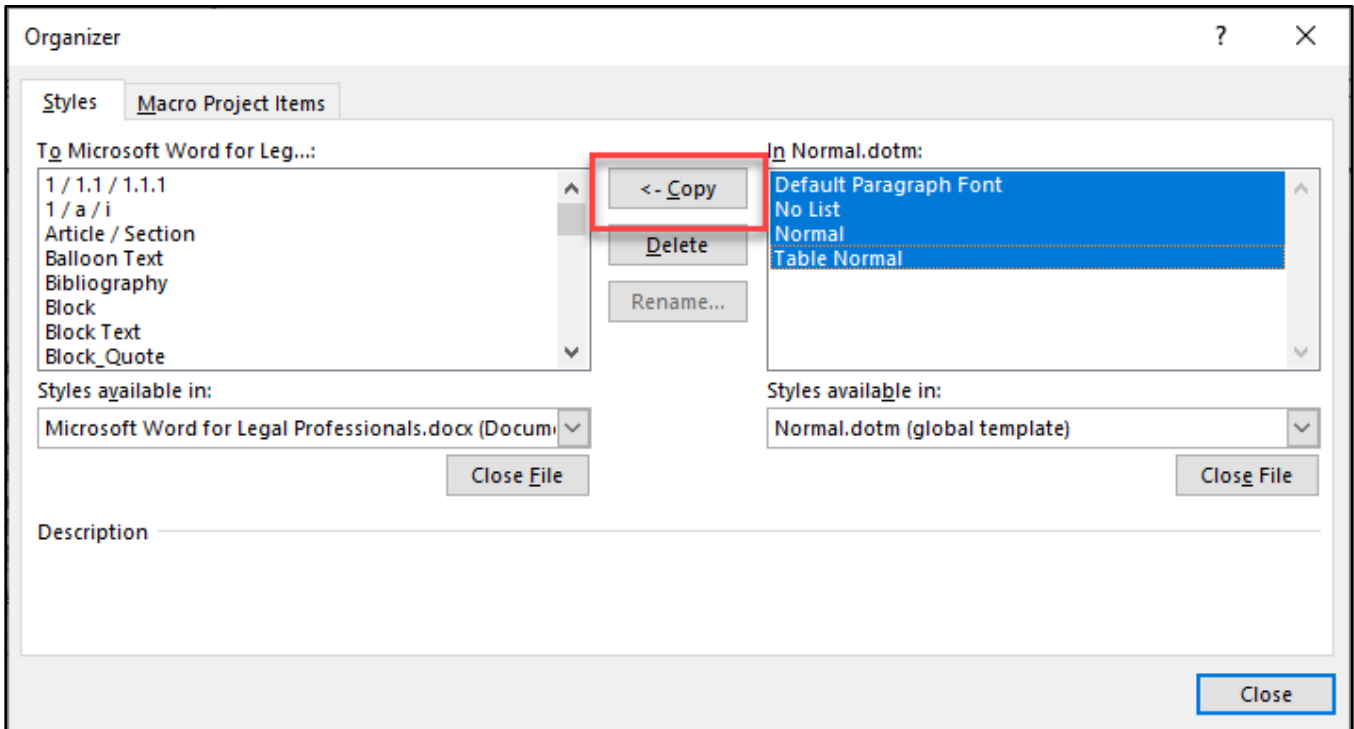


FIGURE 28-6

9. Overwrite the existing styles by clicking on **Yes** or **Yes to All**.
10. Click **Close**.

# CHAPTER 29

# TABLE OF CONTENTS

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

Automatically generating a Table of Contents ("TOC") from a large document can be a huge time saver. If you create a TOC manually, you're wasting hours unnecessarily because one minor change in the document can throw off the entire table.

TOCs are most easily created with styles. The structure of your document will control what technique you should use (see discussion below regarding the difference between segregated titles and non-segregated titles).

## Creating TOCs

### Segregated Titles

"Segregated titles" means that your document looks like Figure 29-1 below. (There is a hard return between the title and the rest of the paragraph.) Note that if you don't use a separate style for each level of the outline, you cannot create a TOC. It's easiest to use the built in Heading styles.

Heading 1	<b>ARTICLE 1 ORGANIZATION</b>
Heading 2	<b>1.1 <u>Formation.</u></b>
Body Text	The Company was organized as an Ohio Limited Liability Company pursuant to the Ohio Limited Liability Company Act (the "Act") by the filing of Articles of Organization (the "Articles") with the Ohio Secretary of State on February 19, 2000.
Heading 2	<b>1.2 <u>Name.</u></b>
Body Text	The name of the Company shall be CAPITAL CITY COMPUTERS, LTD. The Company may also conduct its business under one or more assumed names.
Heading 2	<b>1.3 <u>Purposes.</u></b>
Body Text	The purposes for which the Company is formed are to engage in any activity within the purposes for which a limited liability company may be formed under the Act.

FIGURE 29-1

The TOC gets created for everything styled with Heading 1 and Heading 2.

To generate the TOC:

1. Click in the document where you want to insert the TOC.



2. Click the **References ribbon** → **Table of Contents group** → **Table of Contents button** → **Custom Table of Contents**. DO NOT select one of the sample TOCs you will see when you click the Table of Contents button; ALWAYS create a custom TOC.
3. Word typically defaults to including Heading 1, Heading 2, and Heading 3.

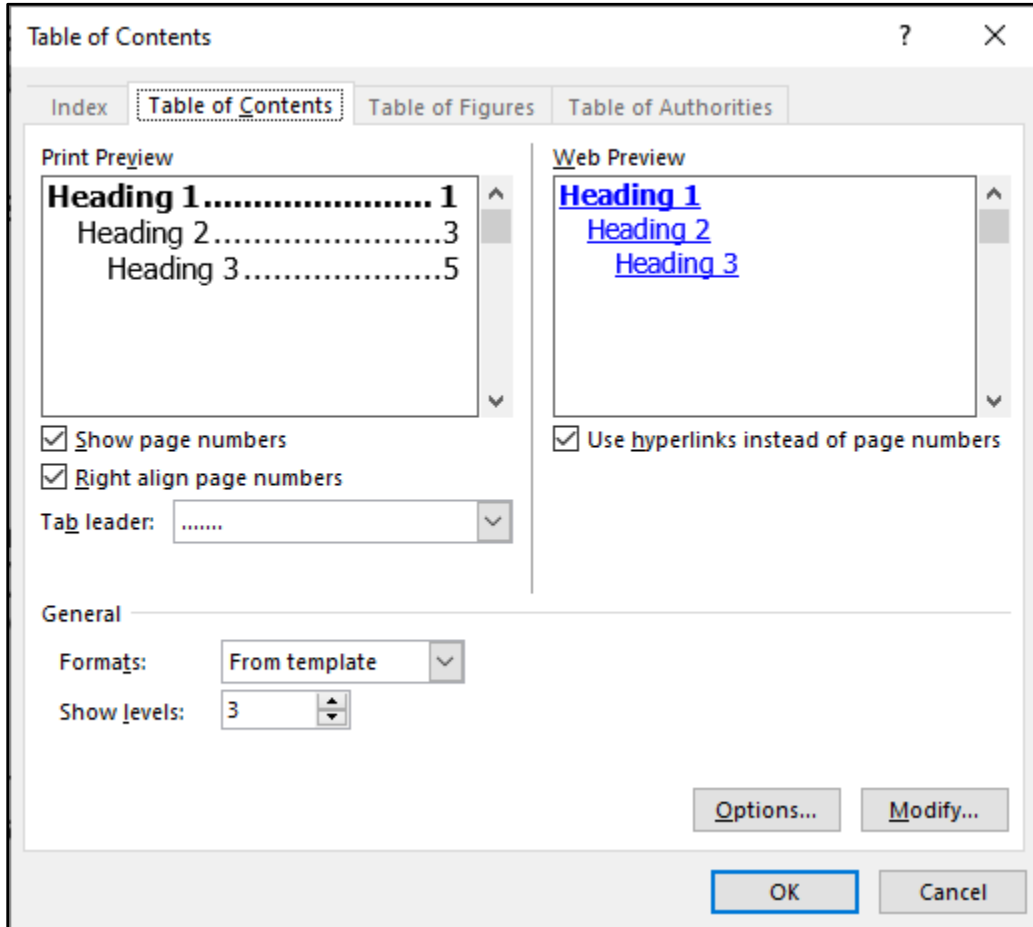


FIGURE 29-2

4. To change which styles are used to generate the TOC, click on the **Options...** button at the bottom of the foregoing dialog.

5. Delete the number next to any styles to exclude from the TOC. Add the Outline level next to any styles to add to the TOC.

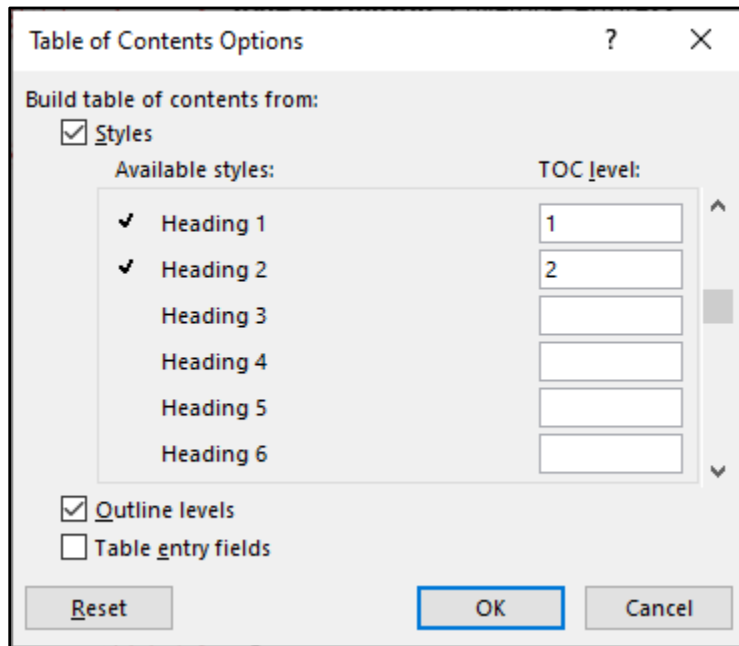


FIGURE 29-3

6. Click **OK** twice.

After the adjustment, the TOC would look like this:

<b>TABLE OF CONTENTS</b>	
<b>ARTICLE 1 ORGANIZATION.....</b>	<b>1</b>
1.1 Formation.....	1
1.2 Name.....	1
1.3 Purposes.....	1
1.4 Duration.....	1
1.5 Offices and Resident Agent.....	1
1.6 Definitions.....	1
<b>ARTICLE 2 BOOKS, RECORDS AND ACCOUNTING.....</b>	<b>1</b>
2.1 Books and Records.....	2
2.2 Fiscal Year; Accounting.....	2
2.3 Capital Accounts.....	2
<b>ARTICLE 3 CAPITAL CONTRIBUTIONS.....</b>	<b>2</b>
3.1 Initial Capital Contributions.....	2
3.2 Additional Capital Contributions.....	2
3.3 Loans.....	2
<b>ARTICLE 4 ALLOCATIONS AND DISTRIBUTIONS.....</b>	<b>3</b>
4.1 Allocations of Profit and Loss.....	3
4.2 Distributions.....	5

FIGURE 29-4

## Non-Segregated Titles

If your document looks like Figure 29-5 (the headings are included with the body text in a single paragraph), you'll need to use linked styles in order to pull just the bold & underline text into your table of contents and leave the rest of the paragraph out.

Heading 1	<p><b>ARTICLE I. ORGANIZATION</b></p>
Heading 2	<p><b>1.1. Formation.</b> The Company was organized as an Ohio Limited Liability Company pursuant to the Ohio Limited Liability Company Act (the "Act") by the filing of Articles of Organization (the "Articles") with the Ohio Secretary of State on February 19, 2000.</p>
Heading 2	<p><b>1.2. Name.</b> The name of the Company shall be CAPITAL CITY COMPUTERS, LTD. The Company may also conduct its business under one or more assumed names.</p>
Heading 2	<p><b>1.3. Purposes.</b> The purposes for which the Company is formed are to engage in any activity within the purposes for which a limited liability company may be formed under the Act.</p>

FIGURE 29-5

If I set up the TOC using the technique demonstrated above for segregated titles, my TOC would look like this:

<b>TABLE OF CONTENTS</b>	
<b>ARTICLE 1 ORGANIZATION.....</b>	<b>1</b>
<b>1.1</b> Formation. The Company was organized as an Ohio Limited Liability Company pursuant to the Ohio Limited Liability Company Act (the "Act") by the filing of Articles of Organization (the "Articles") with the Ohio Secretary of State on February 19, 2000. ....	1
<b>1.2</b> Name. The name of the Company shall be CAPITAL CITY COMPUTERS, LTD. The Company may also conduct its business under one or more assumed names.....	1
<b>1.3</b> Purposes. The purposes for which the Company is formed are to engage in any activity within the purposes for which a limited liability company may be formed under the Act.....	1
<b>1.4</b> Duration. The Company shall continue in existence for a perpetual term, or until the Company shall be sooner dissolved and its affairs wound up in accordance with the Act or this Agreement.....	1
<b>1.5</b> Offices and Resident Agent. The principal office of the Company shall be at 123 Maple Street, Columbus, Ohio 43215, or such other office within or without the State of Ohio as the Members may from time to time determine. The Registered Office and Resident Agent of the Company shall be as designated in the Articles or any amendment thereof.....	1
<b>1.6</b> Definitions. The terms set forth on Exhibit A shall have the meanings as set forth thereon when used in this Agreement.....	1
<b>ARTICLE 2 BOOKS, RECORDS AND ACCOUNTING.....</b>	<b>1</b>

FIGURE 29-6

Obviously, the foregoing isn't going to work because I only need the titles pulled into the TOC and not the entire paragraph. We deal with his issue by creating a special style called a **Linked Style** which is applied ONLY to the titles.

## Setting Up Linked Style(s)

Paragraph styles apply to the entire paragraph, even if you only select a word of the paragraph before applying them. Linked styles, on the other hand, only apply to what you've selected. In the example above, Heading 2 would still be the paragraph style applied to the entirety of the level 2 paragraphs, but we'll use a Linked style we'll call Heading 2 Title which will only be applied to the titles. Here's how you create a Linked style to solve this problem.

1. Select the first title:

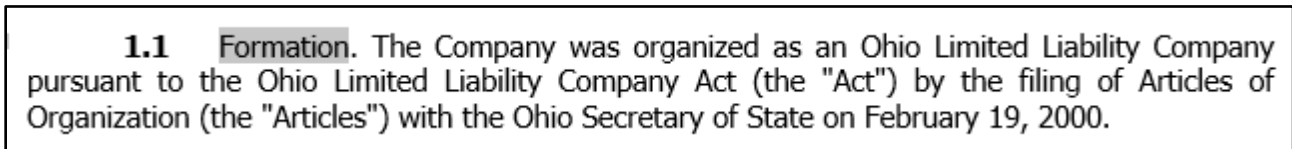


FIGURE 29-7

2. Format it how you want it to appear. In the example above, bold and underline the text.
3. Open the **Styles pane (Home ribbon ► Styles group launcher)** and click the **New Style button** at the bottom of the pane.

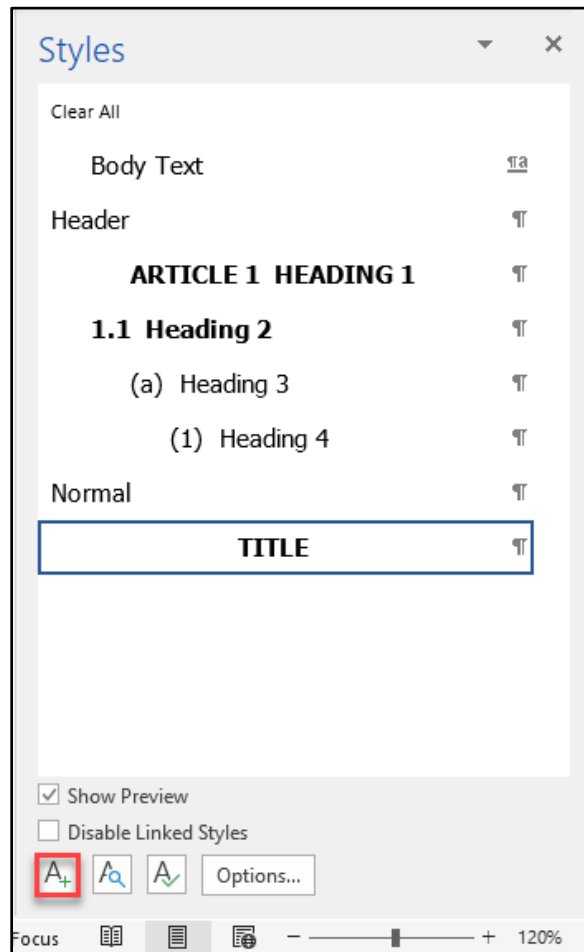


FIGURE 29-8

4. Give the style a name. It is helpful to start with the name of the style that is applied to the entire paragraph and follow it with "TOC." In this example, "Heading 2 TOC."
5. Change the **Style type** to **Linked (paragraph and character)**. It is critical that you make this change when creating the style. You will not be able to change the style type later.

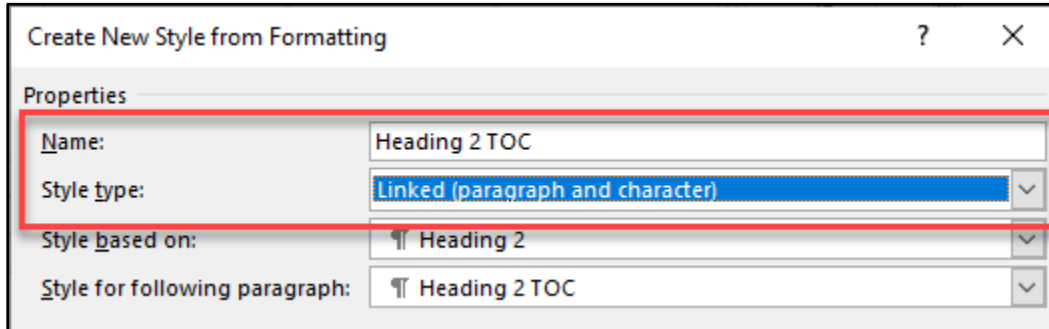


FIGURE 29-9

6. Select each title for this level of the outline throughout your document and apply the new style.

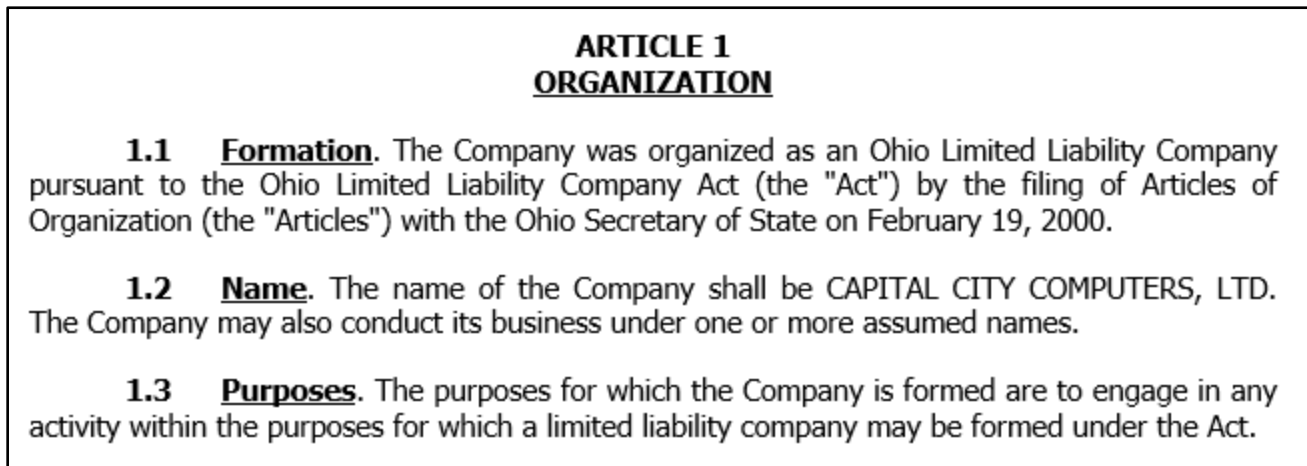


FIGURE 29-10

7. If your document has multiple outline levels to include in the TOC with this issue, repeat the steps above as needed.

### Generating the TOC

1. Click in the document where you want to insert the TOC.
2. Click the **References ribbon** → **Table of Contents group** → **Table of Contents button** → **Custom Table of Contents**. DO NOT select one of the sample TOCs you will see when you click the Table of Contents button; ALWAYS create a custom TOC.
3. To use the new linked styles in the TOC, click on the **Options... button**.

4. Delete the number next to the styles to exclude (in this example, Heading 2 and Heading 3). If necessary, add the outline number next to any unnumbered styles that need added to the TOC.

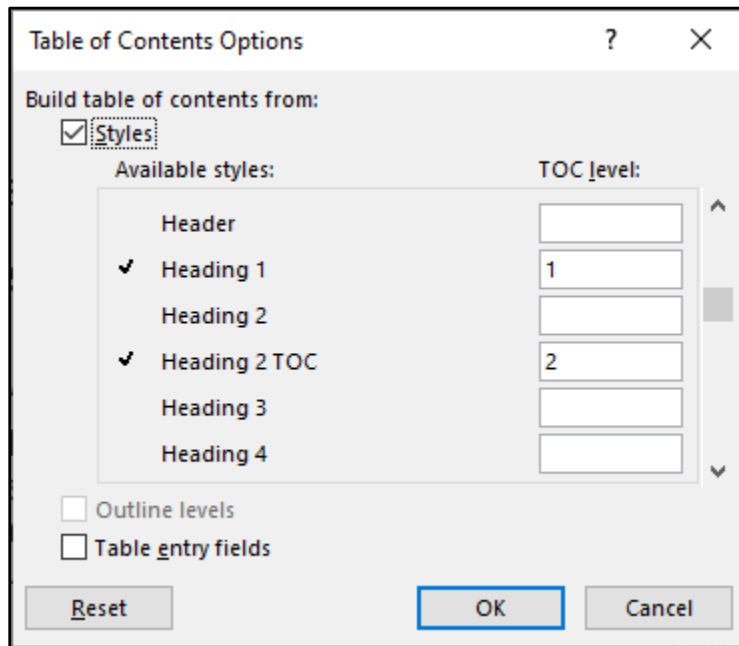


FIGURE 29-11

5. Click **OK** twice.

Now you'll get a TOC with only the headings included.

<b>TABLE OF CONTENTS</b>	
<b>ARTICLE 1 ORGANIZATION.....</b>	<b>1</b>
1.1 Formation.....	1
1.2 Name.....	1
1.3 Purposes.....	1
1.4 Duration.....	1
1.5 Offices and Resident Agent.....	1
1.6 Definitions.....	1

FIGURE 29-12

## Updating the Table of Contents

If you edit the document after you've inserted the table of contents, the table won't automatically update to reflect those changes.

You can either:

- Update all of the fields in the document by selecting the entire document and hitting the **F9** key on your keyboard.
- Right-click anywhere in the TOC and choose **Update Field**.

## Formatting the Table of Contents

The formatting of the TOC is controlled by built-in Word styles called TOC 1, TOC 2, etc., which correspond to each level of the TOC. If you want to change the way the Table of Contents looks, modify the TOC styles. The TOC Styles will automatically appear in your styles pane when they are used in the TOC.

# CHAPTER 30

# TABLE OF AUTHORITIES IN PLEADINGS

---

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

## In General

Automatically creating a Table of Authorities (“TOA”) can be very helpful, especially when the document will likely be changed subsequently. One minor change can throw off the entire TOA. Your options for creating a table of authorities that will automatically update are to use Word's built-in feature or purchase a third-party add-in program.

## Using a Third-Party Program

An excellent program for this purpose, which is faster, easier and actually provides more flexibility than Word's built-in functionality, is Litigation Companion by Litera. For more information about this program see <https://bit.ly/3koLfUT>. Other options include Lexis for Microsoft Office (see <https://bit.ly/3qA7biT>) or Drafting Assistant for Litigation Documents by Thomson Reuters (see <https://tmsnrt.rs/3qyw4eJ>).

## Using Word's Built-In Feature for TOA

The process of creating a table of authorities using Word's built-in feature involves two steps:

1. Marking the citations.
2. Generating the table of authorities based on the marked citations.



## Setting Up TOA Categories First

Categories are the groups of citations you want to appear in your TOA (see Figure 30-1 below). If you don't set these up first, it will be incredibly challenging to change them later.

<i>Wilson v. Castle</i> , 1993 U.S. Dist. LEXIS 9726 (E.D. Pa. 1993) .....	37
<b>Statutes</b> ←	
42 U.S.C. § 1983 .....	3
Tenn. Code Ann. § 4-5-102(12) .....	20
Tenn. Code Ann. § 4-5-202 (West) .....	21
Tenn. Code Ann. § 4-5-216 .....	21, 24
Tenn. Code Ann. §§ 4-3-1105, 4-4- 103; 4-8-101, 103 & 104, 4-3-1103 & 1105 and 4-3-2206 .....	19
<b>Other Authorities</b>	
Tennessee Uniform Administrative Procedures Act .....	23, 25

FIGURE 30-1

## Controlling the Category Names

Word supports up to 16 different categories of citations. The labels for these categories can be changed from the **Mark Citations dialog (References ribbon ▶ Table of Authorities group ▶ Mark Citations button)**. Open the dialog and click **Category...**

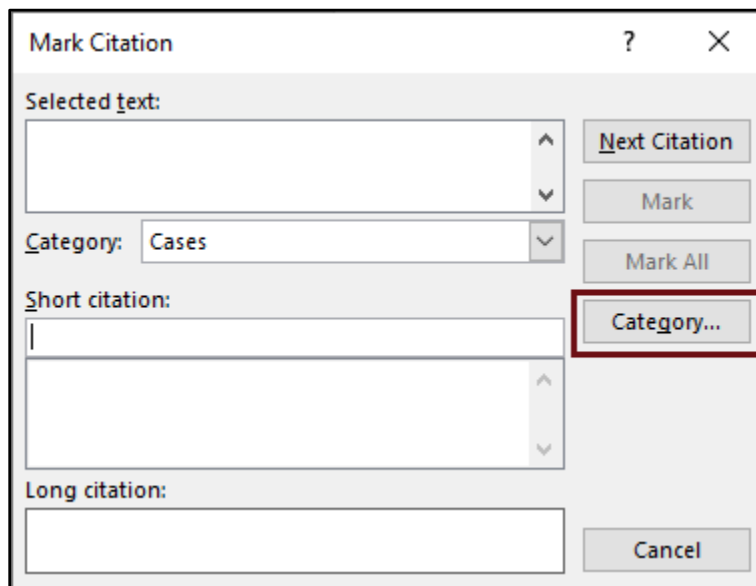


FIGURE 30-2

This will open the **Edit Category dialog** to rename (replace) any of the 16 categories. To replace the **Cases** category with "Ohio Case Law", simply select **Cases** (i.e. category number 1), type "Ohio Case Law" in the **Replace with box**, and click the **Replace** button. Click **OK**, then **Close**.

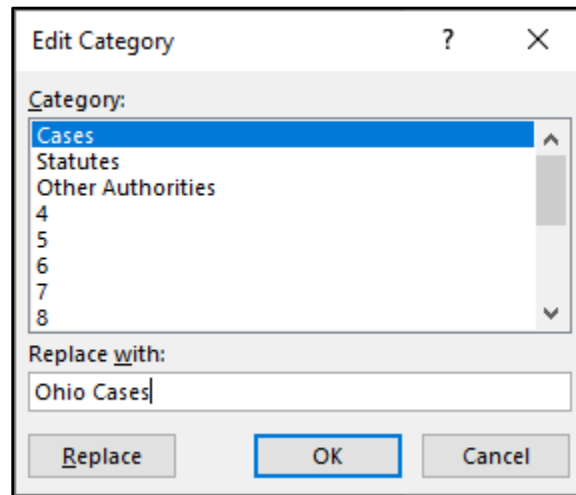


FIGURE 30-3

## The Order of Categories Matters

The order that the categories are listed in Figure 30-3 above controls the order in which the groups of citations will appear in your TOA. In the above example, the Statutes group of citations will appear before the Other Authorities group of citations. Therefore, it's important to make sure you not only have the categories you need, but also that they're in the order you would like. This is incredibly challenging to change later.

## Mark the Citations

Once the categories are set up and in the required order, mark citations throughout the document.

1. Click the **References ribbon** → **Table of Authorities group** → **Mark Citation button**.
2. Click on the **Next Citation button**.
3. Word will find the first citation in your document. Click back in the document and highlight the text with the full citation.
4. With the citation highlighted, click in the **Selected Text area** in the dialog box. Word will insert the highlighted text.
5. Select the proper **Category** (Cases, Statutes, etc.)
6. In the **Short Citations box**, edit the cite as it appears in the document as the short citation.
7. Click the **Mark button** or the **Mark All button** to mark all citations. Note: We believe that Word falls short when it tries to update newly added citations. It was inconsistent, at best, when we tested this feature. As such, we recommend that you create the table of authorities at the very end of the drafting process.
8. Repeat the above steps to mark all citations and close the **Mark Citation dialog box**.

## Generate a Table of Authorities Based on Your Marked Citations

1. Place the cursor where you want to insert the table of authorities.
2. Select **References ribbon** → **Table of Authorities group** → **Insert Table of Authorities button**.
3. Pick the desired format.
4. Deselect the **Use passim** option.
5. Deselect the **Keep original formatting** option.
6. Select **All** under **Category** so that Cases, Statutes, etc. will appear in the table of authorities.
7. Click **OK** to insert the table of authorities.

### Page Number Warning

**NOTE: When the Table of Authorities fields are visible (Show/Hide is turned on), the page numbers will not accurately reflect the actual page numbers of the document.** This is because the Table of Authorities fields, when visible, take up significant additional space which will make your document appear longer than it is (and make the Table of Contents or Table of Authorities page number appear to be incorrect). Click the **Home ribbon** → **Paragraph group** → **Show/Hide button** ¶. This will hide the Table of Authorities fields, and display accurate page numbers. Then update your Table of Authority page numbers (click in the Table of Authorities and click **Update field**).

*Sample Paragraph with TOA Fields Showing (bold added for emphasis)*

That promotions are a mandatory subject of bargaining is widely established in the United States. For example, the California Public Employment Relations Board held that promotional proposals must be negotiated since promotional rights bear a close relationship to virtually every subject of bargaining set forth in the California Act. *California School Emp. Assn. v. Healdsburg Union High School Dist.* (Jan. 4, 1984), Pub. Emp. Bargaining (CCH), 1983-1987 Transfer Binder (Adm. Rulings) ¶ TA ¶ "*California School Emp. Assn. v. Healdsburg Union High School Dist. (Jan. 4, 1984), Pub. Emp. Bargaining (CCH), 1983-1987 Transfer Binder (Adm. Rulings)*" ¶ "*California School*" ¶ c.1. ¶ Paragraph 43,573. Promotions are recognized as a mandatory bargaining subject in the private sector as well. *Ford Motor Co. v. Huffman* (1953), 345 U.S. 330, 73 S.Ct. 681, 97 L.Ed. 1048 ¶ TA ¶ "*Ford Motor Co. v. Huffman (1953)*," 345 U.S. 330, 73 S.Ct. 681, 97 L.Ed. 1048 ¶ "*Huffman*" ¶ c.1. ¶

FIGURE 30-4

*Same Sample Paragraph with TOA Fields Hidden*

That promotions are a mandatory subject of bargaining is widely established in the United States.<sup>1</sup> For example, the California Public Employment Relations Board held that promotional proposals must be negotiated since promotional rights bear a close relationship to virtually every subject of bargaining set forth in the California Act. *California School Emp. Assn. v. Healdsburg Union High School Dist.* (Jan. 4, 1984), Pub. Emp. Bargaining (CCH), 1983-1987 Transfer Binder (Adm. Rulings), Paragraph 43,573. Promotions are recognized as a mandatory bargaining subject in the private sector as well. *Ford Motor Co. v. Huffman* (1953), 345 U.S. 330, 73 S.Ct. 681, 97 L.Ed. 1048.

FIGURE 30-5

## Editing TOA Entries by Editing TOA Fields

Microsoft Word "marks" entries by placing a TOA field immediately before or after the citation. There are two types of TOA fields (1) long citation fields and (2) short citation fields. Once the fields are in the document, edit the fields directly to change the Table of Authorities entry.

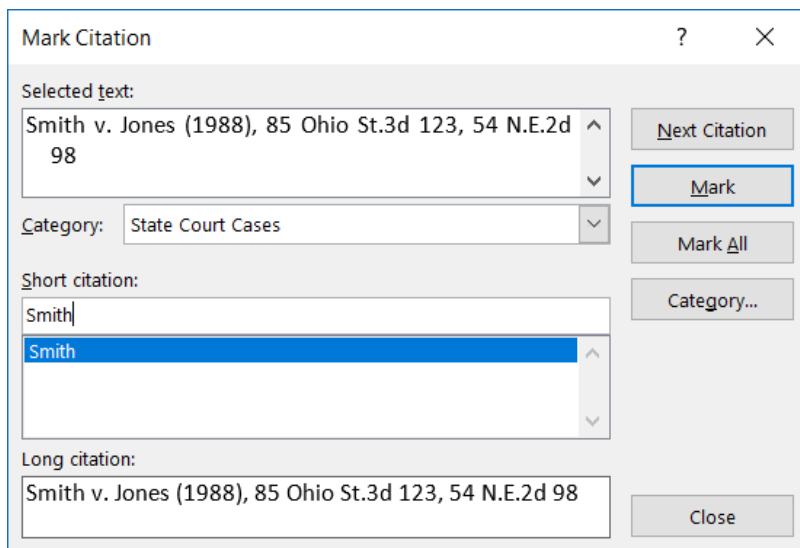
### Long Citation Fields

Long citation fields are used by Word to mark **the first instance** of a citation. Long citation fields have the following format:

{ TA \l "Smith v. Jones (1988), 85 Ohio St.3d 123, 54 N.E.2d 98" \s "Smith" \c }

Here's what each part of the foregoing means:

- **TA** = the field code for Table of Authorities
- **\l "Smith v. Jones (1988), 85 Ohio St.3d 123, 54 N.E.2d 98"** = how the Table of Authorities entry should be displayed in the actual Table of Authorities (see Long citation in the adjacent screen shot).
- **\s** = short citation form that Word will use to search for and mark additional entries.
- **\c** = the category of the citation - for example State Court Cases (see adjacent)



## Short Citation Fields

Short citation fields are used by Word to mark additional instances of a citation in a document. Short citation fields have the following format:

{ TA \s "Smith" }

TA is the field code for Table of

\s is the short citation form that Word will use to search for and mark additional

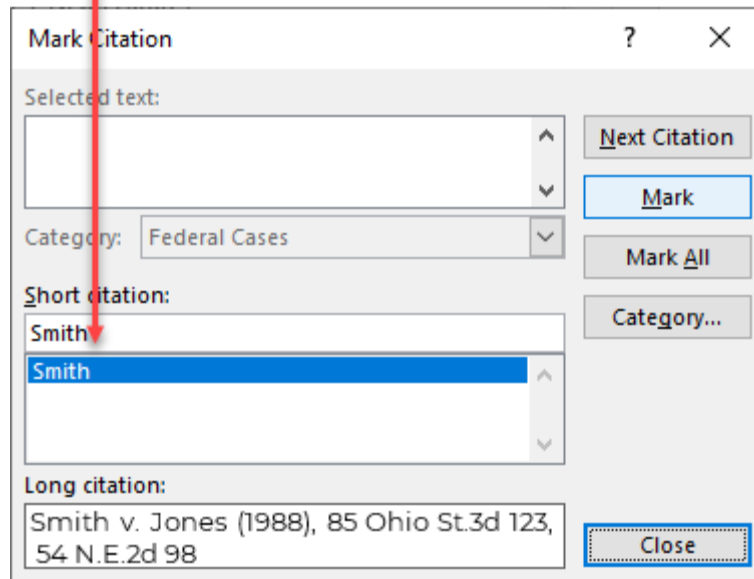


FIGURE 30-6

## How Word Uses Long and Short Citation Fields

Word uses the long citation field to mark the first instance of a citation, and the short citation field to mark additional instances. Therefore, there should be only one long citation field per unique citation and multiple short citation fields for additional instances of that unique citation. See the example below (emphasis added):

*Example Text Showing Long and Short Citation Fields*

Before the Act was adopted to promote this objective, public labor relations were characterized by wide and irrational variations among various local governmental entities relating to all manner of terms and conditions of employment. Not long ago, this court recalled that deplorable time. In *Kettering v. State Emp. Relations Bd.* (1986), 26 Ohio St.3d 50, 56, 26 OBR 42, 496 N.E.2d 983{ **TA \l "Kettering v. State Emp. Relations Bd. (1986), 26 Ohio St.3d 50, 56, 26 OBR 42, 496 N.E.2d 983" \s "Kettering" \c 1**}, this court stated \*\*\*\*

The decision below represents precisely the sort of return to the pre-Act "system" that this court condemned in *Kettering*{ **TA \s "Kettering" }**, supra. This court's holding in *Kettering*{ **TA \s "Kettering" }** makes clear that, under the Act, a collective bargaining agreement binds the municipality and all of its agencies. No municipal agency can operate independently of that agreement; nor can it render the agreement a nullity by purporting to assume control over a term or condition of employment that is governed by the agreement.

## Changing the Format or Text of the Case Citation in the TOA

Edit the long citation field to change the format or text of a case citation entry in the Table of Authorities. For example, if the case name has to be in italics in the Table of Authorities, then make the case name italics in the long citation field. Select the name of the case contained within the quotation marks and make the text italics:

**Change:**

{ TA \l "Smith v. Jones (1988), 85 Ohio St.3d 123, 54 N.E.2d 98" \s "Smith" \c 1 }

**To:**

*Change the text format to*

{ TA \l "*Smith v. Jones* (1988), 85 Ohio St.3d 123, 54 N.E.2d 98" \s "Smith" \c 1 }

This will cause the case name to display with italics in the actual Table of Authorities entry.

To force the case name to be on a separate line within the Table of Authorities, you need to insert a line break (SHIFT + ENTER) into the long citation field where you want to start a second line.

**Change:**

{ TA \l "Smith v. Jones (1988), 85 Ohio St.3d 123, 54 N.E.2d 98" \s "Smith" \c 1 }

**To:**

*Line Break*

{ TA \l "Smith v. Jones (1988),  
85 Ohio St.3d 123, 54 N.E.2d 98" \s "Smith" \c 1 }

Don't worry if the field looks strange in your document. The field does not print, but it will force a line break in your Table of Authorities.

<u>TABLE OF AUTHORITIES</u>	
<b>Cases</b>	
<i>Kettering v. State Emp. Relations Bd.</i> (1986), 26 Ohio St.3d 50, 56, 26 OBR 42, 496 N.E.2d 983	10
<i>Smith v. Jones</i> (1988), 85 Ohio St.3d 123, 54 N.E.2d 98	2

FIGURE 30-7

## Table of Authorities Styles

There are two Table of Authorities styles to be aware of (1) Table of Authorities, and (2) TOA Heading. These two styles control how the Table of Authorities is actually formatted. So, for example, to add a space between the word "Cases" and the citations, you need to modify the TOA Heading style to add a 12 pt space after the paragraph.

Similarly, to add a space between each citation, edit the Table of Authorities style to add a 12 pt space after the paragraph.

Heading 1	<u>TABLE OF AUTHORITIES</u>
TOA Heading	<u>CASES</u>
Table of Authorities	<i>California School Emp. Assn. v. Healdsburg Union High School Dist. (Jan. 4, 1984), Pub. Emp. Bargaining (CCH), 1983-1987 Transfer Binder (Adm. Rulings).....</i> 7
Table of Authorities	<i>Ford Motor Co. v. Huffman (1953), 345 U.S. 330, 73 S.Ct. 681, 97 L.Ed. 1048.....</i> 7

FIGURE 30-8

## Changing a Citation's Category

Sometimes a citation gets placed into the wrong category. For example, a case gets marked as a statute. To change a citation's category, **edit the long citation field**, and change the category to the correct number. For example, if "Cases" is category 1, and "Statutes" is category 2, then to change the citation from being listed in "Statutes" to being listed in "Cases", change the category from 2 to 1. The category is defined in the Long Citation field after the "\c":

**Change:**

{ TA \l "Smith v. Jones (1988), 85 Ohio St.3d 123, 54 N.E.2d 98" \s "Smith" \c 2}

**To:**

{ TA \l "Smith v. Jones (1988), 85 Ohio St.3d 123, 54 N.E.2d 98" \s "Smith" \c 1}

Change the 2 

# CHAPTER 31

# CROSS REFERENCES

---

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## In General

Cross references are used in legal documents quite frequently. Word provides a simple and convenient way to use cross references, allowing them to be automatically updated if a paragraph is moved. For instance, a contract may have a reference that looks something like "see paragraph II.B.3" at the end of a paragraph. Anyone can type "see paragraph II.B.3" without creating a cross reference, but what happens if paragraph II.B.3 is moved – and it now becomes paragraph II.B.4? Word can solve this problem with 100% accuracy.

## Cross Referencing Paragraph Numbers

Cross referencing paragraph numbers requires understanding how to use automatic paragraph numbering (see Chapter 19).

### Numbered Item Method

1. Go to the location where you would like to insert a cross reference.
2. Place the cursor exactly where the cross reference will be inserted.
3. Select **Insert ribbon** → **Links group** → **Cross reference button**.
4. Under **Reference type**, select **Numbered item**.
5. Under **Insert reference**, select **Paragraph number**.
6. Under **For which numbered item**, highlight the correct paragraph that you are cross-referencing.
7. Click **Insert** to insert the cross reference.
8. Click **Close**.



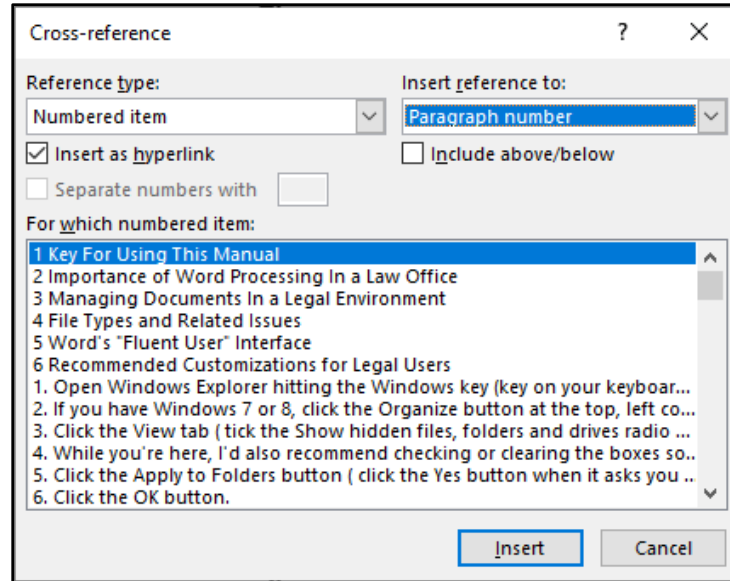


FIGURE 31-1

## Bookmark Method

Former WordPerfect users are accustomed to inserting a "target" code, a "reference" code and then clicking a button to "generate cross reference." The same methodology can be applied to Word's cross references by using bookmarks. When naming bookmarks intelligently, this approach is superior to the numbered item approach above because you can easily determine where a cross reference was pointing in the event that the cross-referenced text is deleted.

In order to use the Bookmark Method, first insert a bookmark to be cross referenced:

1. Click in the paragraph to be cross reference.
2. Select **Insert ribbon → Bookmark button**.
3. Type a name for the bookmark. No spaces are permitted in bookmark names. The name should be sufficiently descriptive to allow you to determine what paragraph was cross referenced in the event that the bookmark is deleted. See page 256 for instructions on how to fix broken cross references.

By default, Word does not show you where bookmarks are inserted. To see the bookmarks (and to avoid inadvertently deleting them), follow the instructions on page 134.

Then insert the cross reference:

1. Click on the spot in the document where you would like to insert the cross reference to the paragraph you just added a bookmark to. Place the cursor exactly where the cross reference will be inserted.
2. Select **Insert ribbon → Links group → Cross reference button**.
3. Under **Reference type**, select **Bookmark**.
4. Under **Insert reference to**, make sure you select **Paragraph Number**.
5. Click **Insert** to insert the cross reference.
6. Click **Close**.

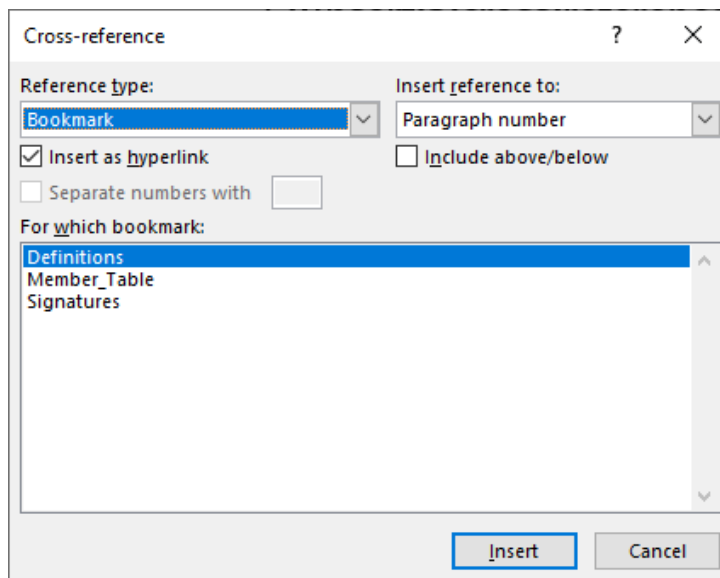


FIGURE 31-2

## Complex Paragraph Numbers

Regardless of which method you use, when inserting a cross reference to a subparagraph, you may want to include the parent paragraph number (for example "4(g)" or "Article 5, paragraph 3"). Alternatively, you may want to reference a subparagraph without referring to the parent paragraph number (for example "(g)").

**Paragraph number (full context)** is used to include the parent paragraph number (for example of "4(g)"). To add any characters between the subparagraph and the parent paragraph (most often spaces or commas), check the **Separate numbers with box** and enter the characters to be inserted.

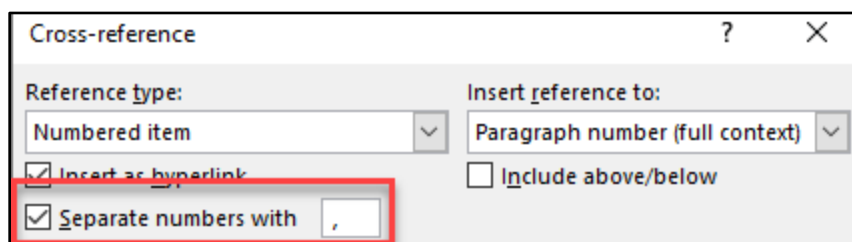


FIGURE 31-3

**Paragraph number (no context)** is used to exclude the parent paragraph number (for example "(g)" without the "4").

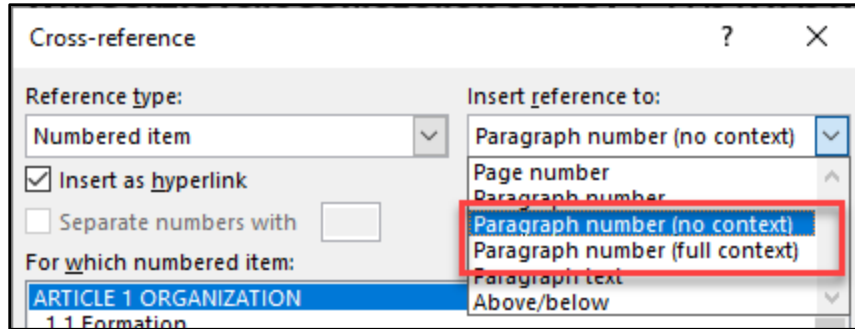


FIGURE 31-4

Sometimes, full context will not include all of the context you need or will not format the cross reference in the way that you need (for example "Article 5, paragraph 3"). In that case, insert two separate cross references - one to "Article 5" and one to "paragraph 3." You may need to type characters, such as commas and spaces between the cross references.

### Above/Below

Sometimes you may want to indicate whether the cross-referenced paragraph is located above or below the cross reference (for example "paragraph 3 below"). Manually typing "above/below" can cause problems if the paragraphs are later reordered. Rather than manually typing "above/below," check the **Include above/below box** to include it and have it automatically update when the cross reference is updated.

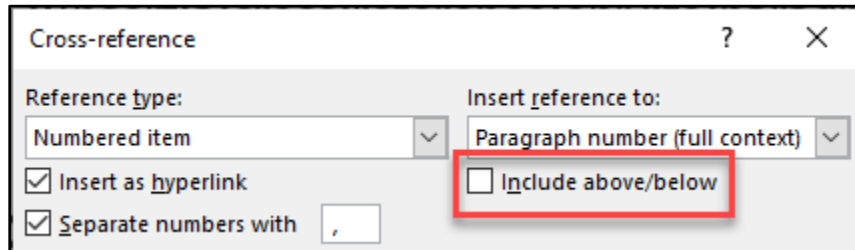


FIGURE 31-5

### Cross Referencing Page Numbers

Follow the steps above using either method, except under **Insert reference to**, select **Page Number**. Selecting the page number will cross reference the page number of the numbered item or bookmark. If the numbered item or bookmark spans multiple pages, it will insert the page number that it starts on.

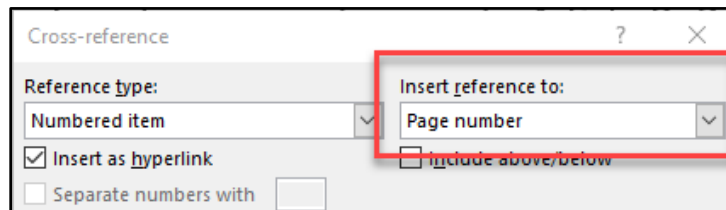


FIGURE 31-6

## Cross Referencing Paragraph and Bookmarked Text

When referring to paragraphs, such as articles, by name, cross-reference the text. Cross referencing text ensures that when you update the article name that every reference to the article name is automatically updated.

### Numbered Item Method

The numbered item method works when cross referencing the text of full paragraphs. This is most helpful when cross referencing article titles or other numbered paragraphs that contain only a title. Follow the numbered item method above, except under **Insert reference**, select **Paragraph text**.

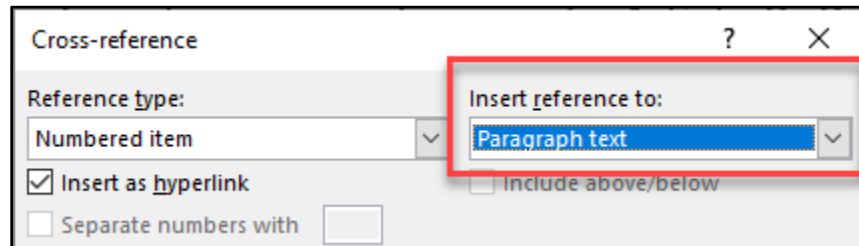


FIGURE 31-7

### Bookmark Method

The bookmark method works when cross referencing the text of full paragraphs or portions of a paragraph. This method gives you superior control over how much or little text to cross reference. However, if edits are made to the document, text may be inadvertently added or removed from the bookmark, causing the cross references to be incorrect. To avoid this issue, always show bookmarks in your documents - see instructions on page 134.

1. Select the text to be bookmarked. Most often this is a paragraph title.
2. Select **Insert ribbon** → **Bookmark button**.
3. Type a name for the bookmark.
4. Click **Add**.
5. Repeat the steps above for inserting the cross reference using the bookmark method, except under **Insert reference**, select **Bookmark text**.

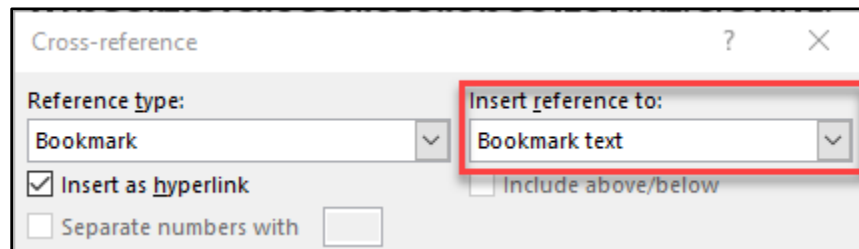


FIGURE 31-8

## Cross Reference Capitalization

When text, such as "article," is included in your automatic paragraph numbering scheme, the cross reference to that paragraph numbering will include that text. Often, "article" appears in all

caps when used in the numbering scheme but should appear in title case in cross references. If you would like the capitalization to appear differently where cross referenced, start by inserting the cross reference per the instructions above using either method. Once inserted:

1. Right-click on the cross reference and select **Edit Field...**
2. Under **Format**, select the desired capitalization.
3. Check the **Preserve formatting during updates** box. Checking this prevents the field from reverting to the original formatting when updating fields.

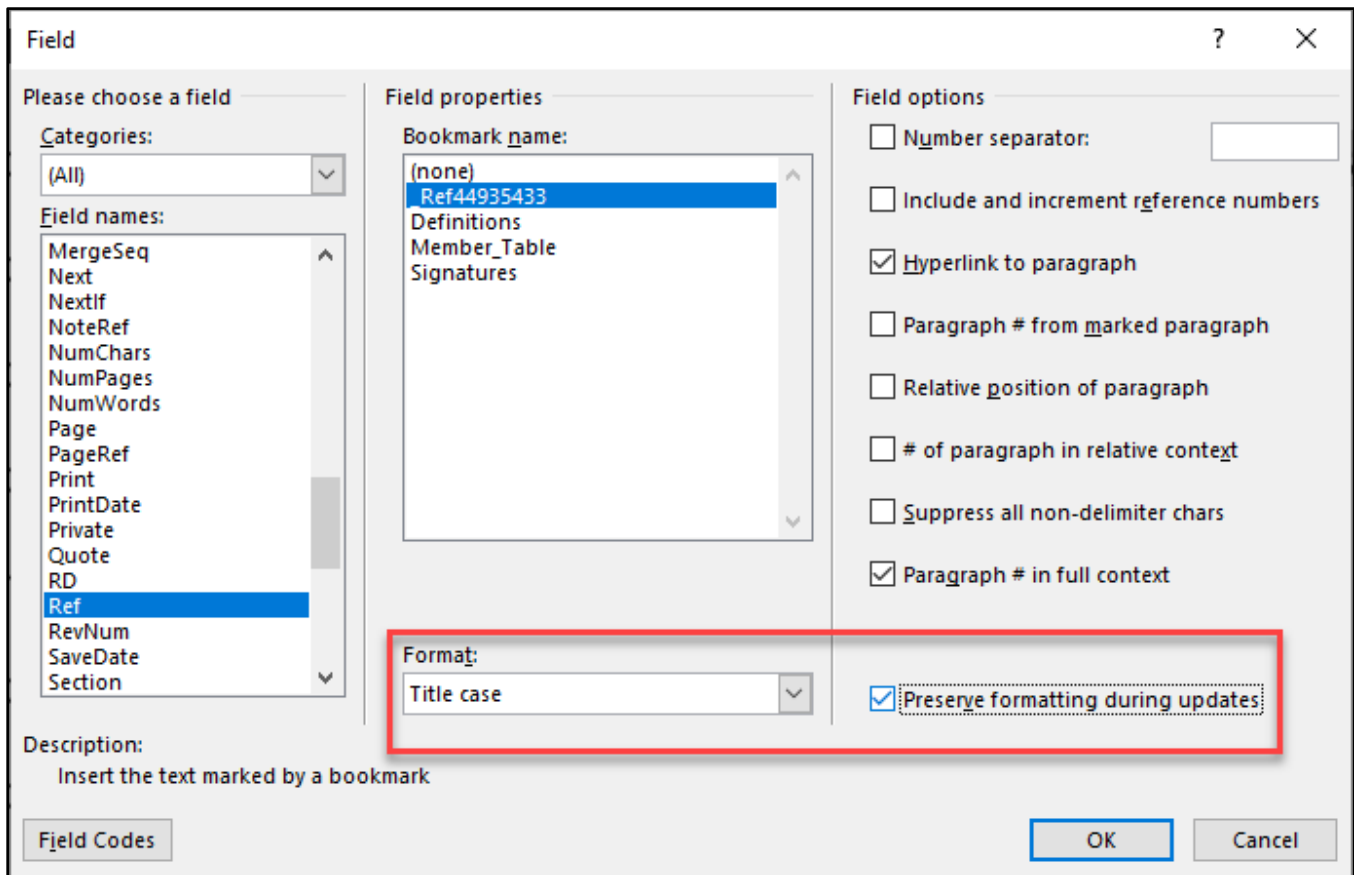


FIGURE 31-9

## Updating Cross References

Like tables of contents and tables of authorities, cross references only automatically update when you update fields in your document. To quickly update all cross references:

1. **Ctrl + A** to select the whole document.
2. Hit **F9** on your keyboard to update fields.

To ensure that all cross references are updated before you share or print a document, get in the practice of repeating the steps above. You can also set cross references (and all other fields) to automatically update before printing. To do so:

1. **File → Options.**
2. Under **Display**, check **Update fields before printing.**

3. Click **OK**.

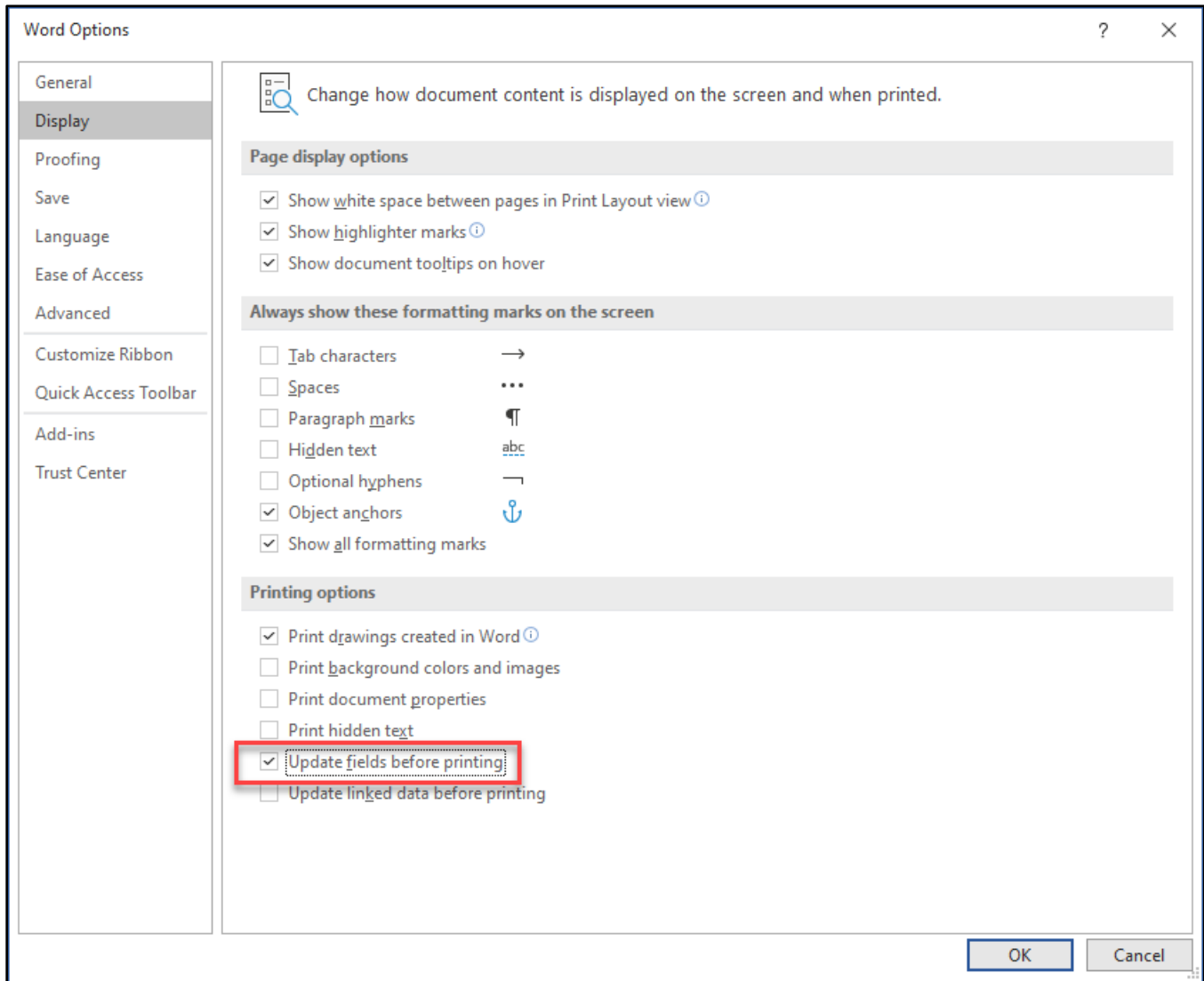


FIGURE 31-10

## Following Cross References

You can click on a cross reference to be taken to the cross-referenced paragraph by holding down the ctrl key on your keyboard while left clicking on the cross reference with your mouse. If you add the back button to your Quick Access Toolbar (see page 101), you can quickly get back to the cross reference.

## Broken Cross References

Cross references break when the text that was being cross referenced is deleted from the document. Neither method of inserting cross references prevents these errors.

## Finding Broken Cross References

When updating cross references, check for broken cross references by searching for "Error!" Broken cross references created by the numbered item method show up as "Error! Reference source not found." Broken cross references created by the bookmark method show up as "Error! Bookmark not defined." There is no need to search for each type of error separately - searching for "Error!" will find all of the broken cross references.

## Fixing Broken Cross References

Once you have found a broken cross reference, you must manually fix it. If the cross reference was created using the bookmark method, you can right-click on the cross reference and select **Toggle Field Codes**. The field code will reveal the name of the deleted bookmark. You can also do this for cross references to numbered items, but the result will be a string of meaningless numbers. Either way, you will have manually figure out what text should be cross referenced now or if the cross reference should be deleted all together. The easiest method of fixing broken cross references is to delete the existing broken cross reference and insert a new cross reference using the steps above.

# CHAPTER 32

# REDLINING & PROTECTING ATTORNEY WORK PRODUCT

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## Negotiating Documents in General

Emailing documents back and forth with layers upon layers of proposed changes and revisions can get extremely complicated and confusing. There are many approaches to this issue and exploring them all is really beyond the scope of this manual. However, it is well within the scope of this manual to identify the electronic tools you have at your disposal for marking changes to a document.

### Comments

#### Adding Comments

Comments are a useful way to annotate a document you intend to send to someone else for review. To insert a written comment, follow these steps:

1. Select the text you want to comment on.
2. Go to the **Review ribbon** ➔ **Comments group** ➔ **New Comment** button.
3. Type the comment text in the comment balloon in the right margin.

In Word 2013/16/19, the comments look like this:

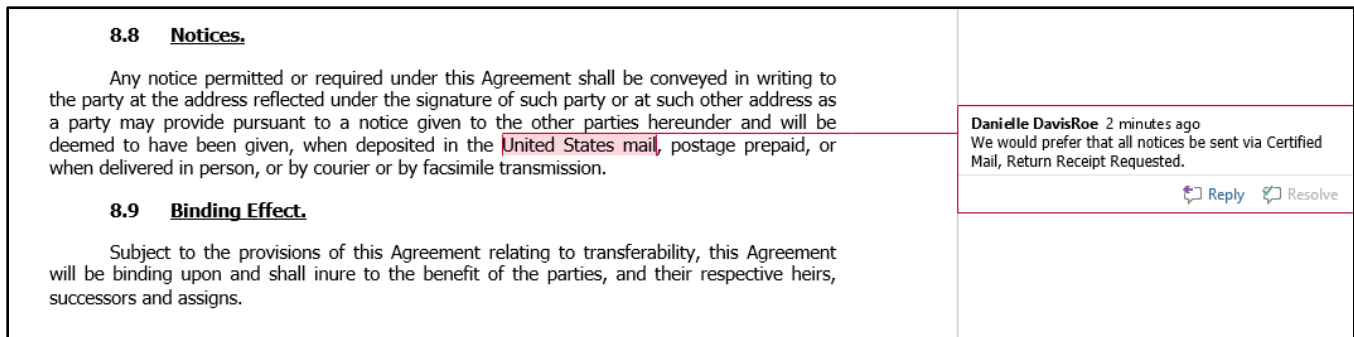



FIGURE 32-1



Word for 365/2021 has “modern comments.” They work very similarly to the comments in 2013/16/19, but you’ll need to “post” your comment once you’re done typing it by clicking the button that looks like this: . Depending upon how current your Word 365 version is, you may have two options for the way comments are displayed, contextual or list. However, if you have the latest version, you may be limited to only one option which is equivalent to what was previously called the list view (this change occurred in version 2108 Build 14326.20852). The comment shown in Figure 32-2 below is how a contextual comment appears. The big differences between contextual and list view are: a) contextual view puts the relevant comment immediately adjacent the line being commented on, and b) contextual view hides all “resolved” comments so you’re only presented with the remaining active comments. For an explanation of resolving a comment, see Resolving a Comment/Marking As Done below.

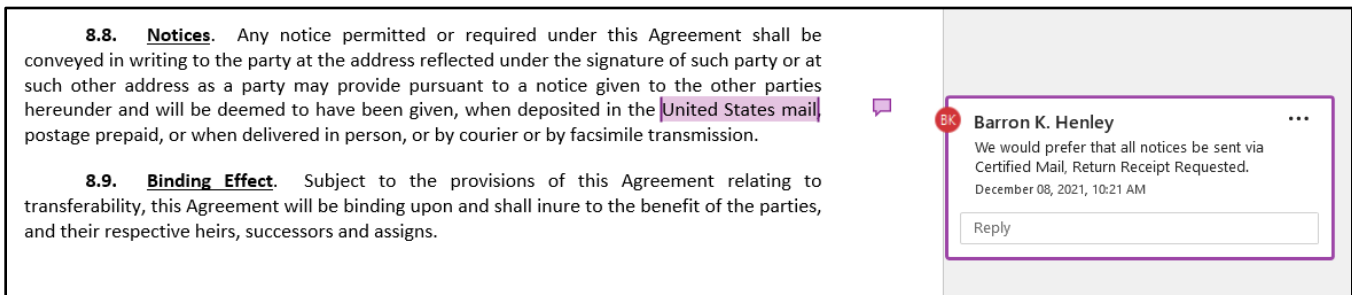



FIGURE 32-2

Figure 32-3 below is how a comment appears when in list view (or the only way they appear in the latest build). The difference is that they’re smaller and don’t necessarily appear adjacent to the line of text that is being commented on. When you click on the  button, it puts a darker (magenta) rectangle around the relevant comment so it’s visually distinct from the other comments.

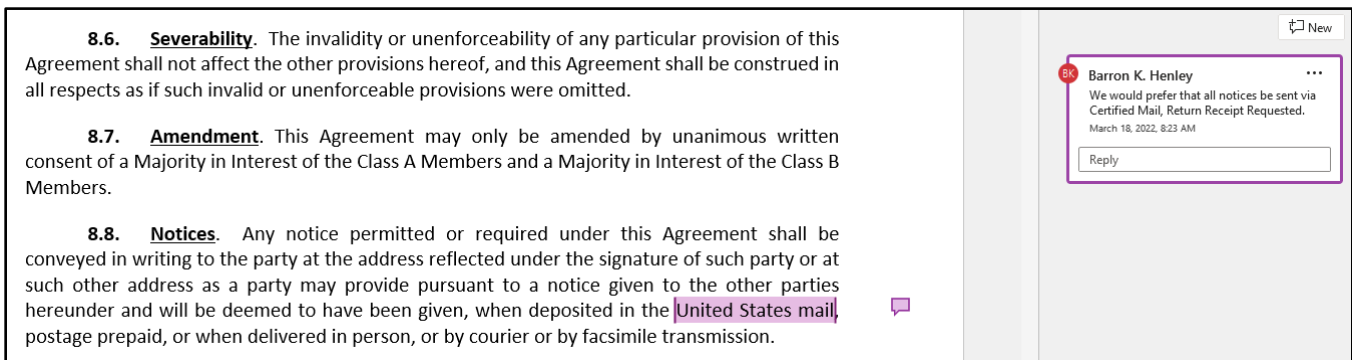


FIGURE 32-3

## Reply to Comments

You can reply to a comment and your reply will be contained in the original comment balloon. In Word 2013, click on the icon on the right side of the comment.

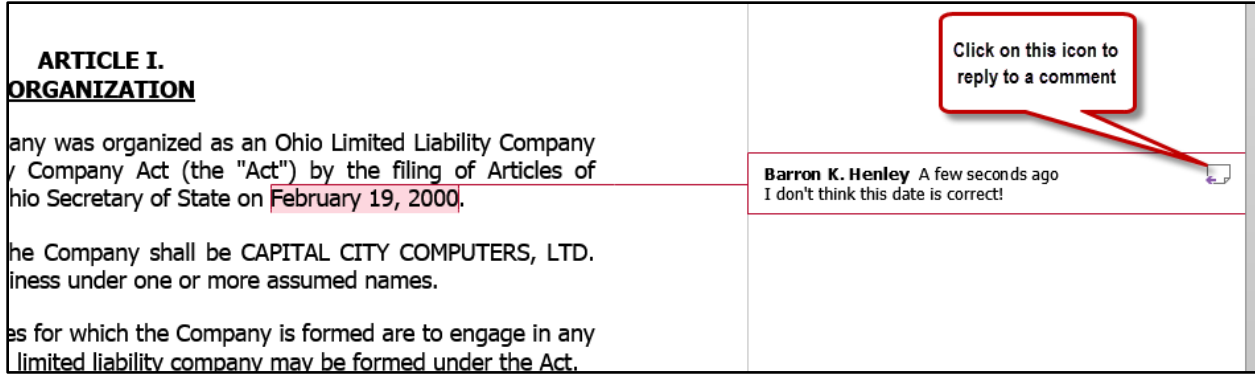


FIGURE 32-4

The Reply button is labeled in Word 2016/19

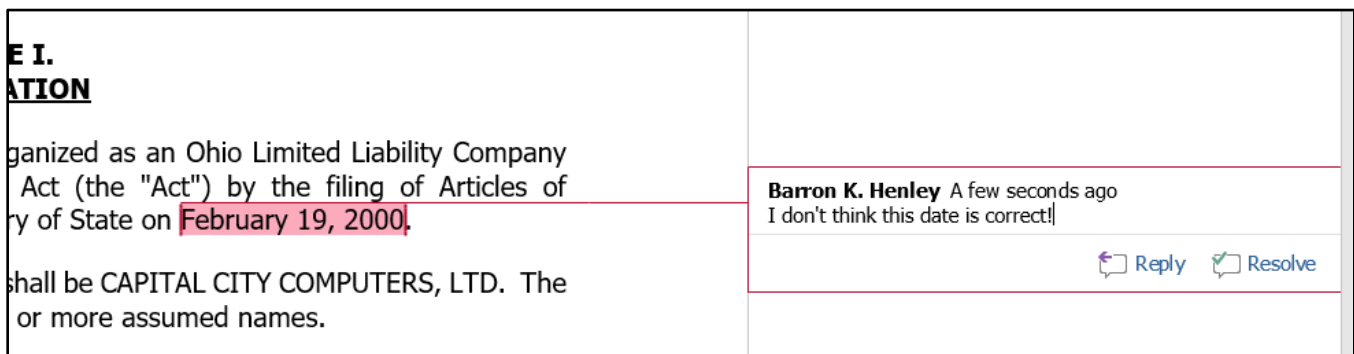


FIGURE 32-5

In 365/2021, click in the Reply box.

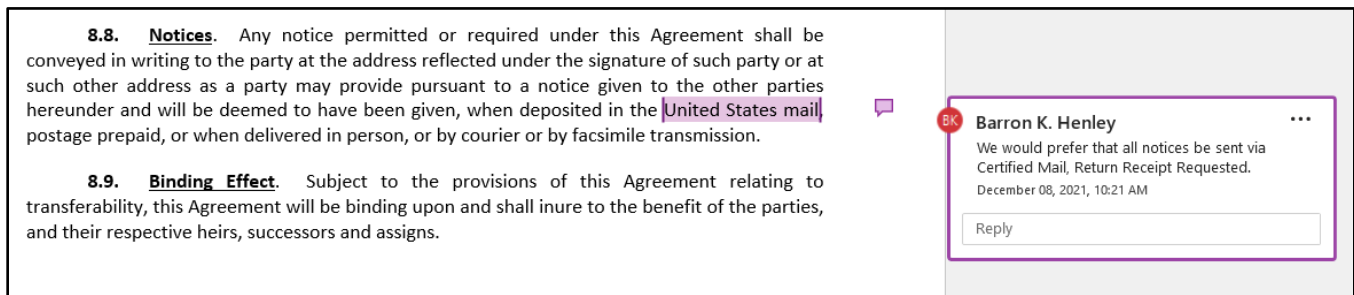


FIGURE 32-6

## Resolving Comments/Marking As Done

You can mark comments as done or resolved. In Word 2013, right-click the comment balloon and select **Mark As Done**. This will gray-out the comment. In Word 2016/19, click on the **Resolve** button which is inside every comment balloon. In 365/2021, click on the **...** button.

## Comparing Documents Electronically

The ability to easily and effectively compare documents is one of the most powerful features of Word. Its usefulness is best illustrated through an example. Assume you generate the first draft of a commercial lease and email it to opposing counsel for comments and revisions. Opposing counsel opens the document in Word at their office, makes changes, inserts comments, saves it, and emails it back to you. With the Compare and Merge Documents feature of Word, you can

electronically compare what you sent opposing counsel with what you received back and let Word "mark" the changes that were made. Then, you can accept or reject each individual change with the click of a button.

### Step 1 - Fix Balloons

By default, Word shows deleted text in balloons in the right margin. Most people find this annoying. If you would like to see deleted text red-lined in the body of the document, click the **Review ribbon → Tracking group → Show Markup button → Balloons → Show only comments and formatting in balloons.**

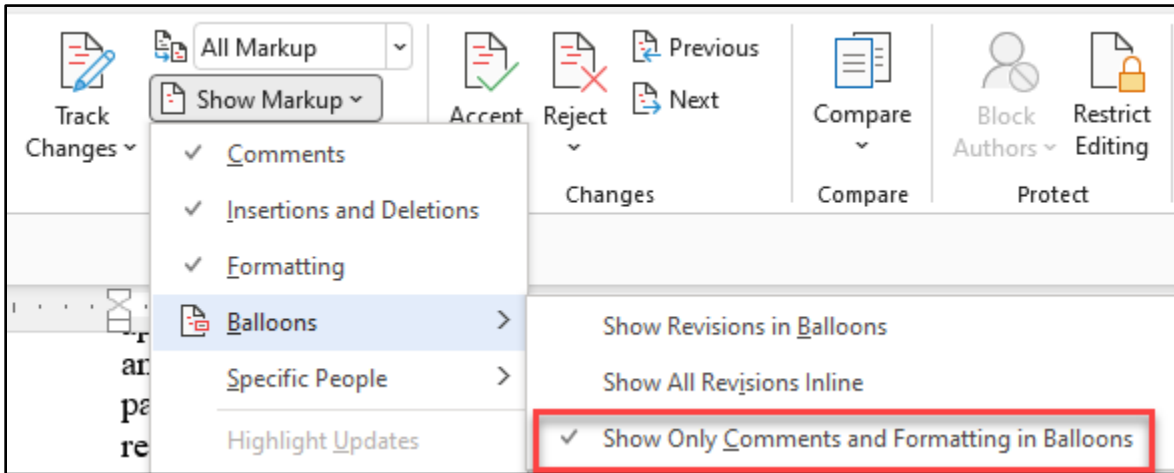


FIGURE 32-7

### Step 2 - Set Your Compare Options

You have total control over how Word indicates changes between two documents. To make any changes to the default preferences, click the **Review ribbon → Tracking launcher.**

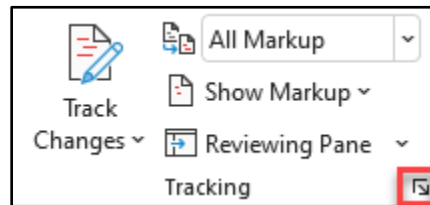


FIGURE 32-8

Click on the **Advanced Options... button.**

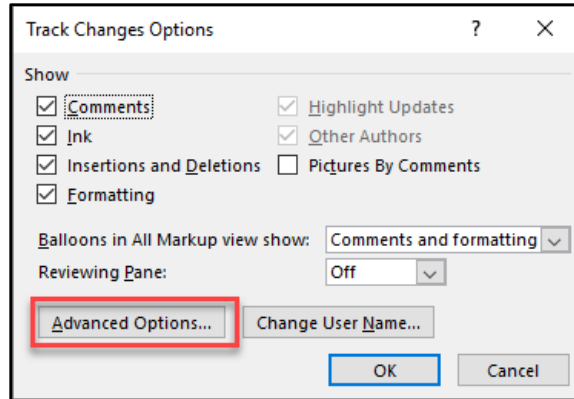


FIGURE 32-9

The options include the ability to change the colors for each type of change, whether to track formatting, and adjusting the width of columns.

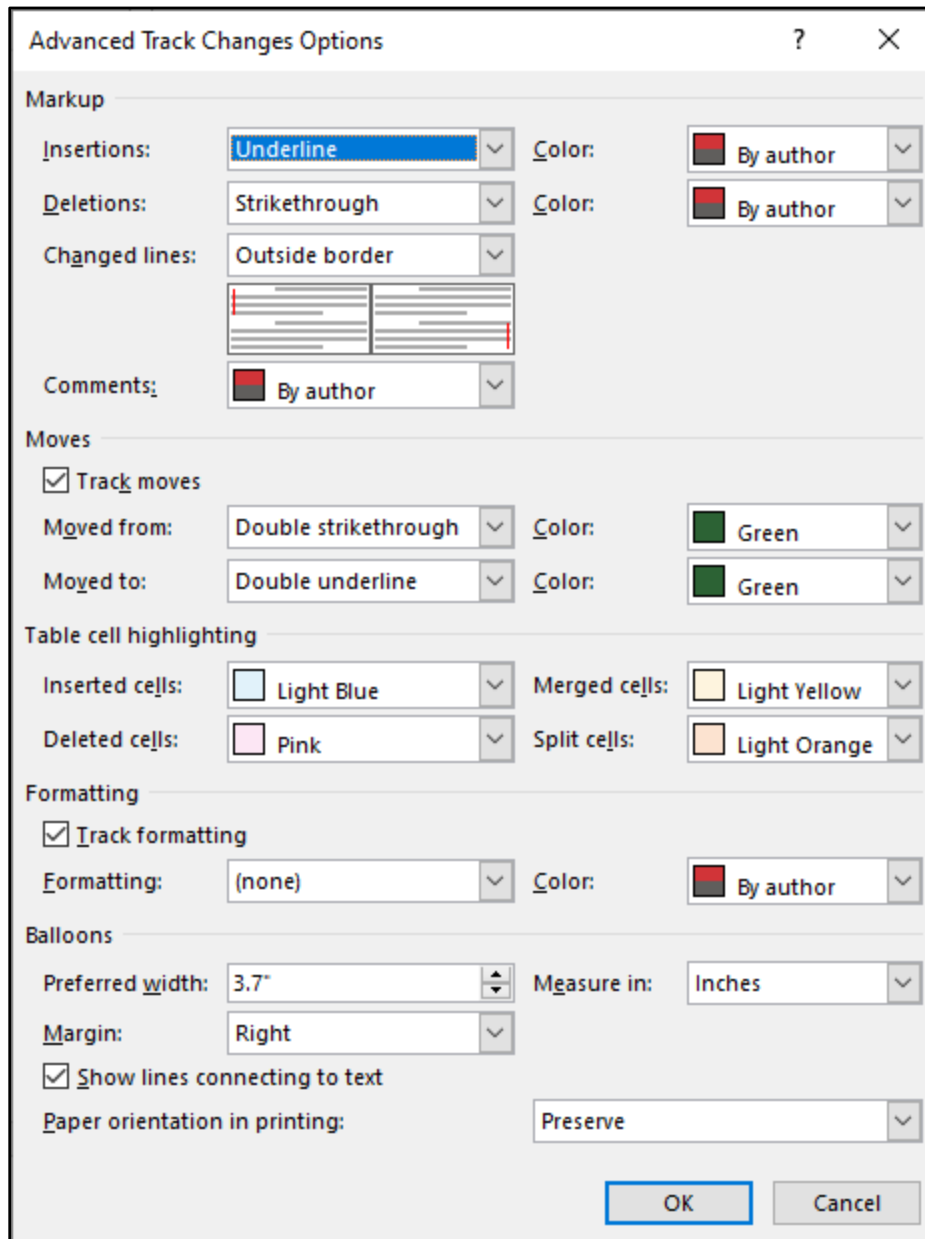


FIGURE 32-10

### Step 3 - Save the Modified Version of the Original Document with a Different File Name

If you emailed the original version of the document to opposing counsel, when the modified version is emailed back to you, DON'T save it with the same name as the one you sent them originally. Save it with a different name, preferably by just adding a "version 2" to the end of the name.

## Step 4 - Compare the Original Document to the Edited Document

1. Click the **Review ribbon** → **Compare group** → **Compare button** → **Compare...**

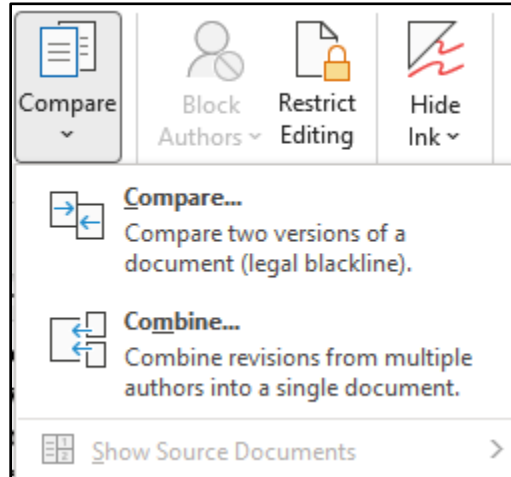


FIGURE 32-11

2. Click the **browse button** on the left side of the subsequent dialog and choose the original document. On the right side, click the **browse button** and choose the document that has been modified. Click the **More button** to show all options. Uncheck **Formatting** if you'd rather not see formatting changes

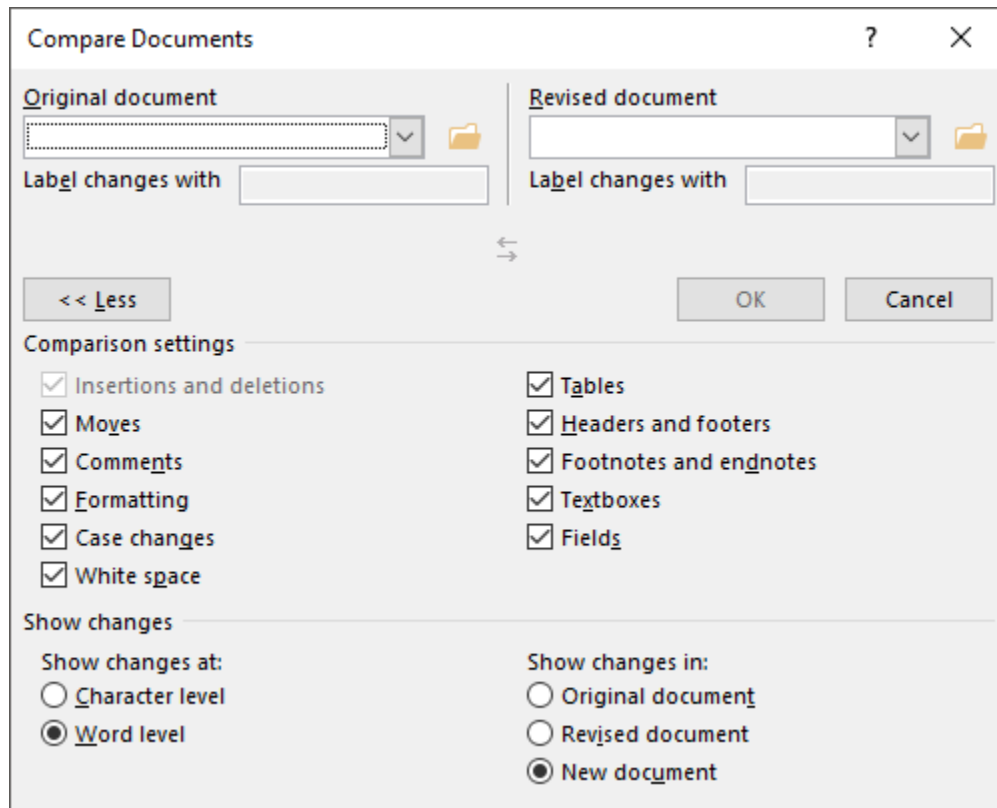


FIGURE 32-12

3. Click **OK**.
4. Word will then create a new document by merging the original and altered documents and highlighting the differences between the two. At this point, you may want to save the new, merged document with a new name.

## Step 5 - Show the Source Documents

If you want to see the source document, click the **Review ribbon** → **Compare group** → **Compare button** → **Show Source Document button** → **Show both** and you'll be able to see the comparison document, plus both documents you compared; and they will scroll synchronously.

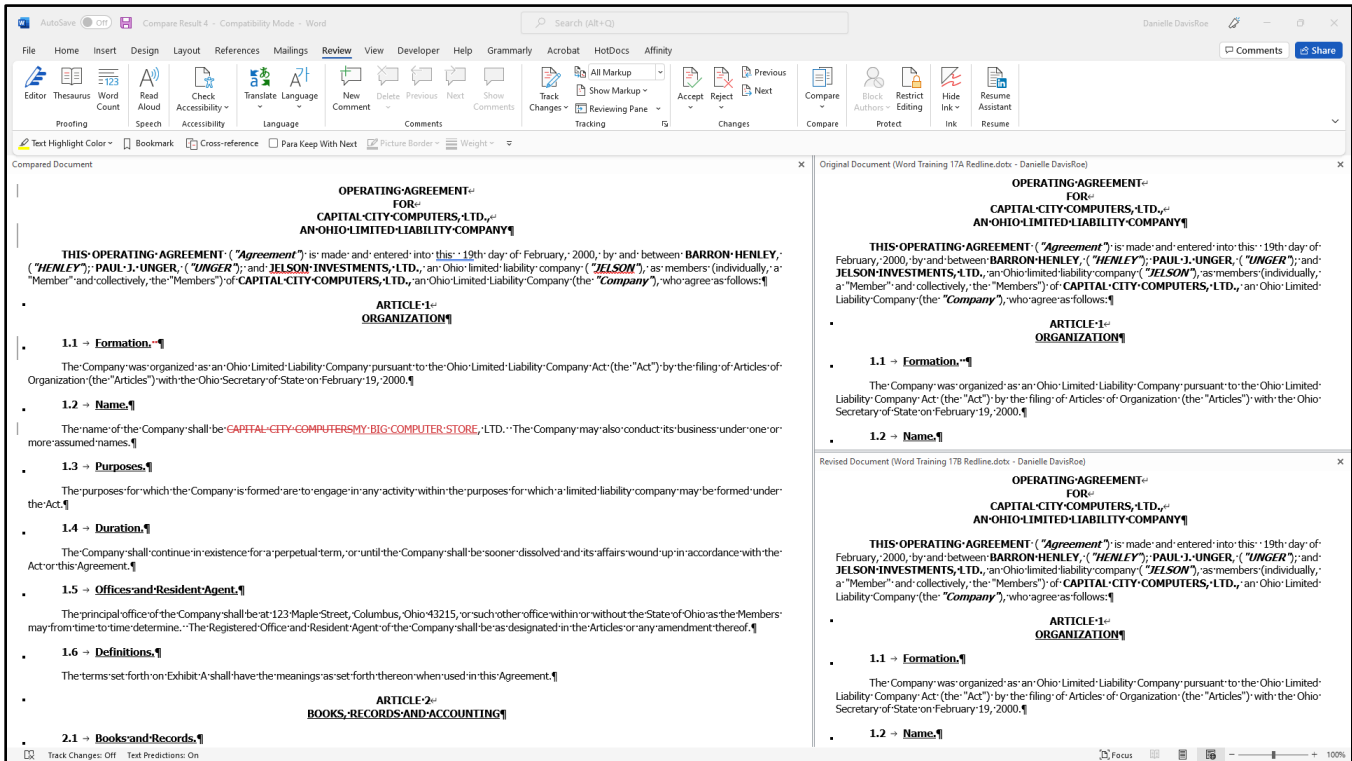


FIGURE 32-13

## Step 6 - Accept or Reject Proposed Changes

Once you generate the Compare document, you can accept or reject changes in it quickly and easily by using the buttons in the **Review ribbon** → **Changes group** → **Accept or Reject buttons**.

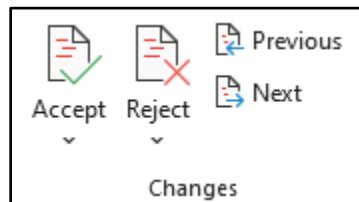


FIGURE 32-14

# Combining Documents

## Common Problem for Lawyers:

Let's suppose a lawyer needs to send out a document for comment (using track changes) to three people. Each recipient makes proposed changes and then emails them back. Now the lawyer has to figure out who made what changes and encapsulate those changes into a single master document.

For purposes of this example, assume your original is called **Contract v1.docx** and the documents containing comments that you received back are **Contract v2 - Lisa.docx**, **Contract v3 - Jim.docx** and **Contract v4 - Paul.docx**.

1. First you go to the **Review ribbon** → **Compare group** → **Compare button** → choose **Combine**.

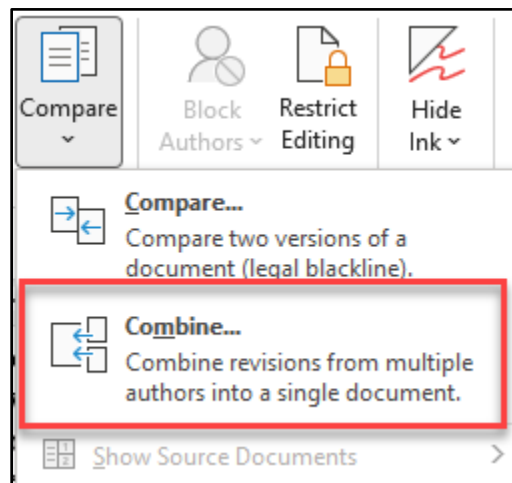


FIGURE 32-15



- Now compare v1 to v2 and note how I've chosen to label the changes and very importantly, where the **Show changes in** will occur:

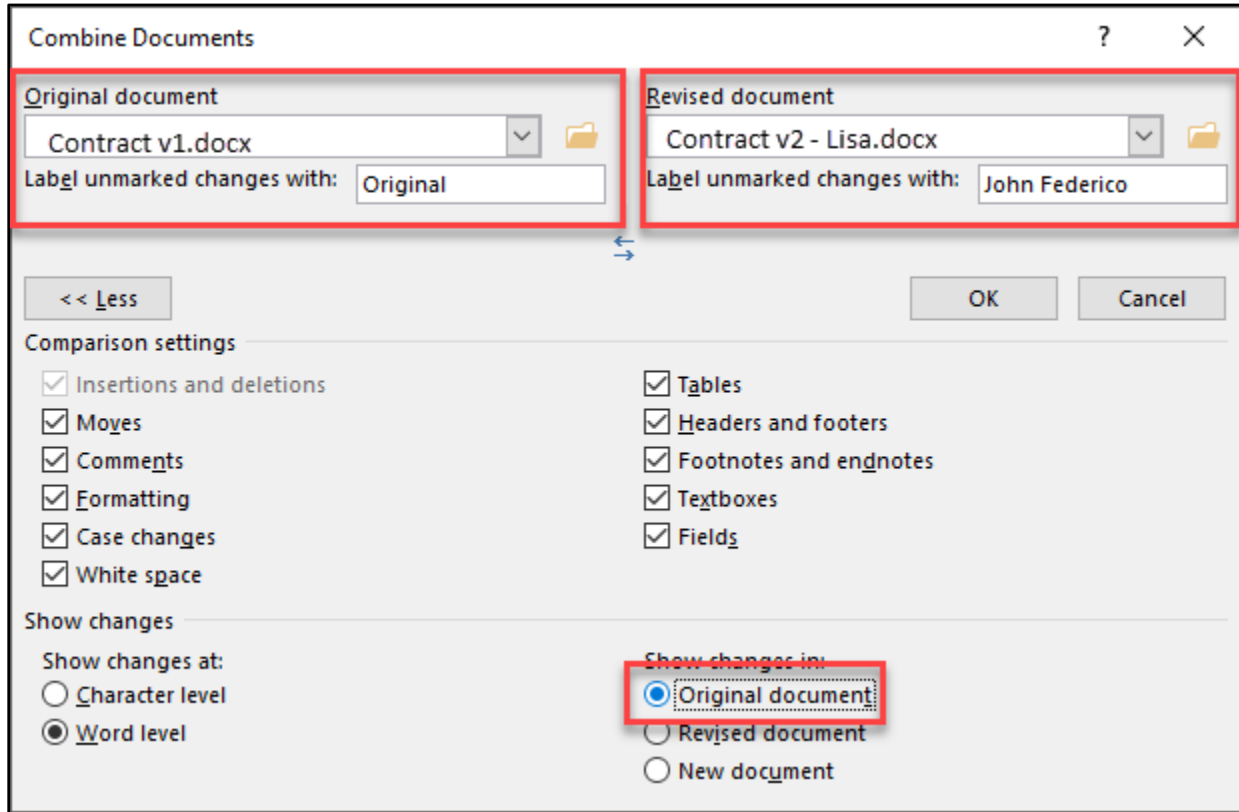


FIGURE 32-16

- Word will now open the original document and have transferred Lisa's proposed changes INTO the original. Just save it.
- Now repeat the foregoing process comparing v1 with v3. This adds Jim's proposed changes to the original (and leaves Lisa's there as well).
- Repeat for v4 and you're done. Only slightly laborious, but the end result is worth the time. If you have Word set to track changes by author, then each person's proposed changes will show up in the final document in a different color.

## Tracking Changes as you Edit

Use this if someone sends you a first draft and you would like to courteously mark your proposed changes to the document. To have Word track your proposed changes as you make them, follow these steps:

- Open a document.
- Click **Review ribbon** → **Tracking group** → top of the **Track Changes button**.
- As long as Track Changes is on, all insertions, deletions and alterations to the document will be tracked automatically.

In 365, you can turn on tracking for just your changes. Click on the **bottom half of the Track Changes button** and select **Just Mine**.

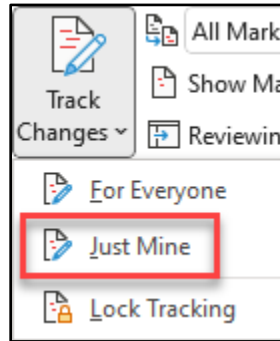


FIGURE 32-17

## Prevent Editors from Turning Off "Track Changes"

The problem with the Track Changes feature in Word is that it is an on/off switch. Therefore, you could send a document to opposing counsel for review, and they could turn on Track Changes for some modifications and turn it off for others. In other words, just because you receive a document with some tracked changes in it doesn't mean that *all* of the changes were tracked. However, there's a way to turn on Track Changes and lock it on before you send a document to someone else for review. If you do this, every change the recipient makes will be tracked since they will be unable to turn off Track Changes while they work on your document.

1. Click on the **Review ribbon** → **Tracking group** → **bottom half of the Track Changes button** → **Lock Tracking**.

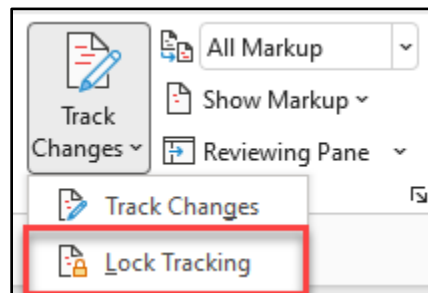


FIGURE 32-18

2. You'll be presented with a screen in which you can create a password. There is no forgot my password feature, so save a copy where changes are locked on or record your password somewhere. Note that even though you enter a password, the file could still be hacked by a skilled, malicious user, and the password possibly removed; but this will be a significant hurdle for most users to overcome.
3. Save the document once you've locked on Track Changes and email it to the reviewers. When they make changes, they will all be tracked.
4. If you're concerned that the password was removed, you can compare versions. Save the edited version as a new document. Then, turn off Track Changes by clicking the **Review ribbon** → **Protect group** → **Restrict Editing button** again → click the **Stop Protection button** which appears at the bottom of the **Restrict Formatting and Editing pane** → enter your password. Now click the **Review ribbon** → **Changes group** → **bottom of the Accept button** → **Accept All Changes and Stop Tracking**.

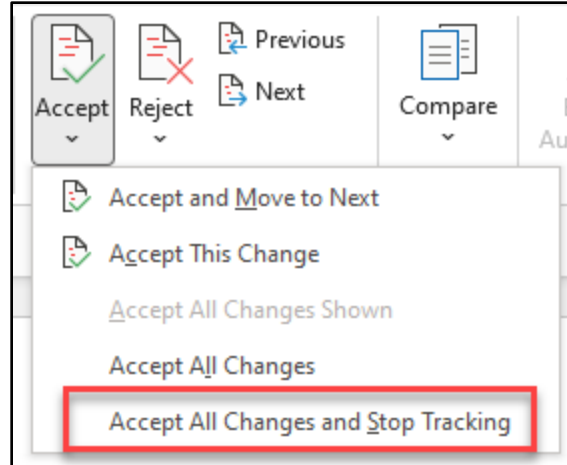


FIGURE 32-19

5. Save the file as another new version. To ensure that you're seeing all changes made in the document, you need to compare the version you emailed your reviewer in the first place against the version you received back from them with all changes accepted. The steps for doing this are shown under the heading Comparing Documents Electronically, on page 260 above.

## Metadata

Word documents store a lot of information that you may not want to share with others outside your organization. This information is known as "metadata." Metadata is used for a variety of legitimate reasons to enhance the editing, viewing, filing, and retrieval of word processor documents. Some metadata is readily accessible through your word processor, but other metadata is only accessible through extraordinary means, such as opening a document in a low-level binary file editor. Here are some examples of metadata that may be stored in your documents:

- Your name
- Your initials
- Your company or organization name
- The name of your computer
- The name of the network server or hard disk where you saved the document
- Other file properties and summary information
- Non-visible portions of embedded OLE objects
- The names of previous document authors
- Document revisions (number of revisions and duration of revisions)
- Document versions
- Template information
- Hidden text
- Comments

## Metadata Removal Tool

To remove metadata from a Word document:

1. Click the **File menu** ➔ **Info** ➔ **Check for Issues** ➔ **Inspect Document**.
2. It will ask you to save the document before you inspect it, but it isn't necessary unless you want to save it.
3. Now you're presented with options for what Word will check for. By default, all options are checked:

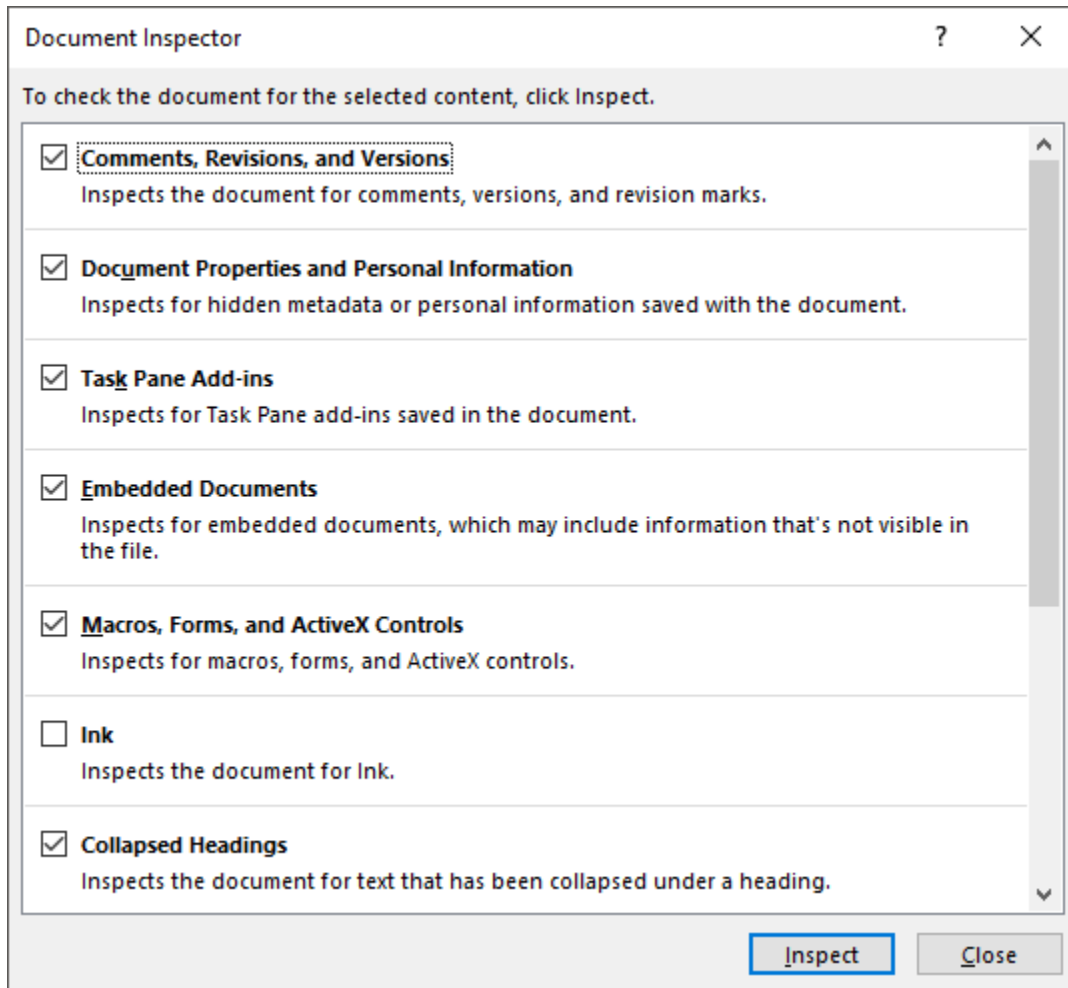


FIGURE 32-20

4. Click **OK**, and Word will inspect the document. Each subsequent version of Word has additional options to check for.
5. Now you're presented with a list of items Word found and you can elect what you remove by click the appropriate Remove buttons. **Be careful about removing Headers, Footers & Watermarks since most people WANT those things in their documents.** If you remove headers and footers, you're also going to remove page numbering.

## Protecting Confidential Documents - Legal Tip

### Encrypt and Set a Password to Open a Document

You can password protect Word documents so that they can only be opened by people with the password. Note that there is no forgot my password feature. Either save an unprotected copy or record the password somewhere secure. Do not email the password along with the Word document - share the password with recipients another way.

1. Click the **File menu** → **Info** (left side) → **Protect Document button** → **Encrypt With Password**.
2. Enter the password, confirm the password, then save!

### Set Password to Modify or Make Your Document Read Only

Alternatively, you can allow a document to be opened by anyone but only let those who with the password make changes.

1. Click the **File menu** → **Save As** (SK: **F12**). If in the backstage view, click on **Browse** to open the **Save As dialog**.
2. Click the **Tools button** at the bottom of the **Save As dialog** and choose **General Options...**

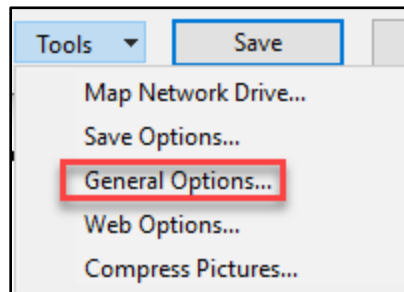


FIGURE 32-21

3. Enter a password to modify the document or check **Read-only** to prevent changes from being made.

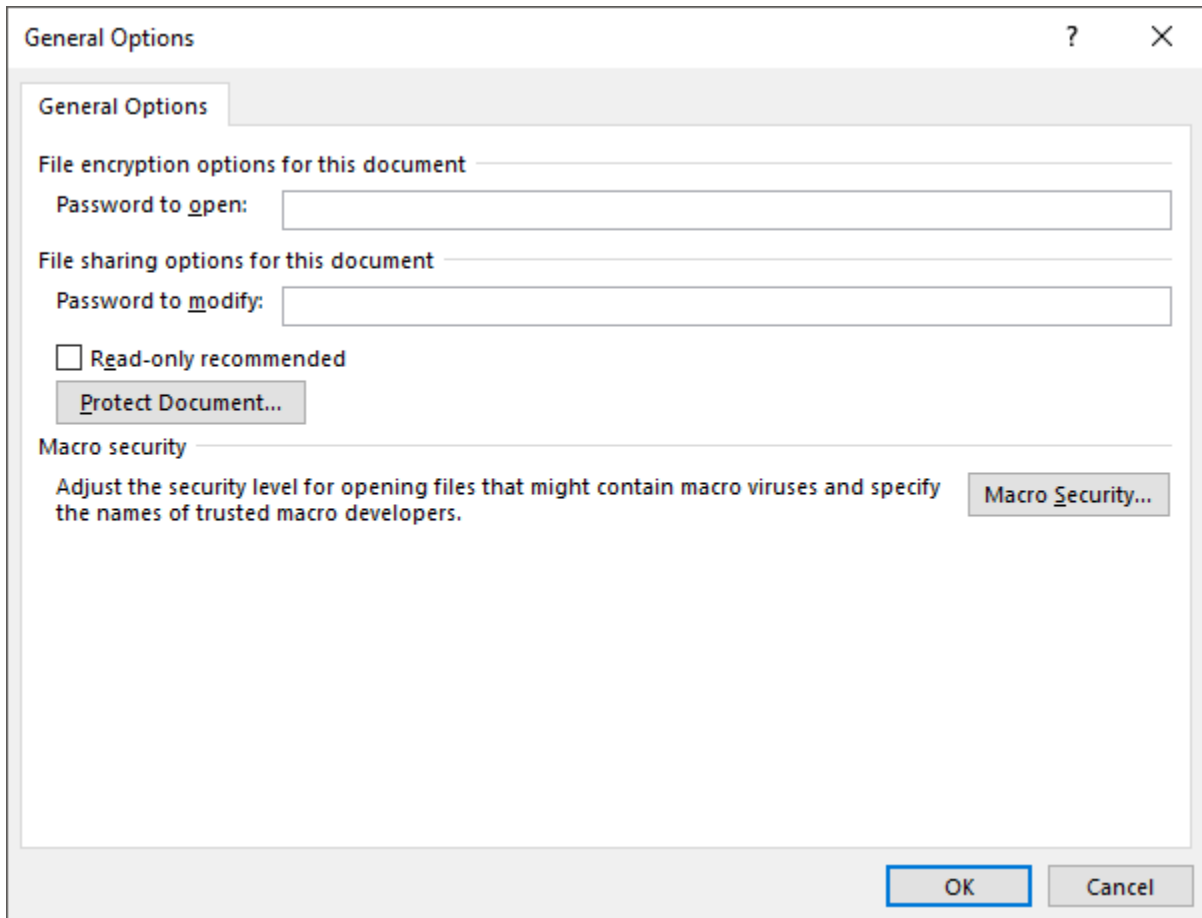


FIGURE 32-22

# CHAPTER 33

# AUTOMATING WITH MACROS AND AUTOTEXT CLAUSE LIBRARIES

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## Quick Parts and AutoText

Quick Parts and AutoText are used to quickly insert formatted text into your document. They are found on the **Insert ribbon**, in the **Text group**, under the **Quick Parts button**.

### The Difference Between Quick Parts and AutoText

Quick Parts and AutoText are two different galleries. AutoText, located as a subgallery under the Quick Parts button, is slightly harder to access. AutoText, however, can be easily inserted by typing the first few characters of the name and hitting enter.

AutoText entries are stored in your normal.dotm template. Quick Parts are stored in the Building Blocks.dotx template, likely stored at:

C:\Users\*(your logon name)*\AppData\Roaming\Microsoft\Document Building Blocks\1033

### Creating Quick Parts and AutoText

1. Type and format the text to be turned into a Quick Part or AutoText.  
To save it as a Quick Part: **Insert ribbon** → **Text group** → **Quick Parts** → **Save Selection to Quick Part Gallery...**  
To save it as AutoText: **Insert ribbon** → **Text Group** → **Quick Parts button arrow** → **AutoText** → **Save Selection to AutoText Gallery**
2. Type the name that you would like to assign to the entry.
3. Click **OK**.

### Using Quick Parts and AutoText

To insert a Quick Part into your document, click the **Insert ribbon** → **Text group** → **Quick Parts** → **Building Blocks Organizer...** → select your entry → **Insert button**.

To insert an Auto Text entry into your document, either:

- Click the **Insert ribbon** → **Text Group** → **Quick Parts button arrow** → **AutoText** → then click the appropriate AutoText entry.

or

- Type a few letters of the name of the entry until you get a suggestion to hit enter. Then, hit **Enter**.

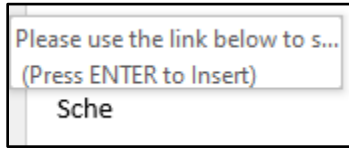


FIGURE 33-1

## Macros

### What Are Macros?

A macro is a series of actions which can be attached to a single key stroke, toolbar button or both. When you have a task which requires a large number of steps, and it is something you must do repetitively, a macro can probably save a great deal of time. For example, you can set up a macro to make a paragraph single spaced and dual indented, or to insert the date.

To create a macro, you simply turn the macro recorder on and while it is running, you perform the typing and editing that you would like incorporated into the macro. When you're done, you can play the macro by pressing the keystroke or button that you assigned to the macro.

### When Should I Use a Macro?

Macros are not really suited to simply insert blocks of text. For that, you're much better off using AutoText Entries which are described on page 273 above. However, macros do a wonderful job of simplifying time-consuming or difficult chores like cleaning up documents that were converted from WordPerfect or cleaning up documents that have been scanned and OCR'd (Optical Character Recognition).

### Where Are Macros Stored?

Macros are stored in templates and if a macro is stored in the template called Normal.dotm, it will be available regardless of what document you're editing. If you need a macro that isn't available in Normal.dot, you can attach the template that holds it by going to **Developer ribbon** → **Templates group** → **Document Template button** → **Attach**.

### Moving Macros from One Template to Another

To move a macro from one template to another, select **Developer ribbon** → **Templates group** → **Document Template button** → **Organizer... button** → **Macro Project Items tab**.



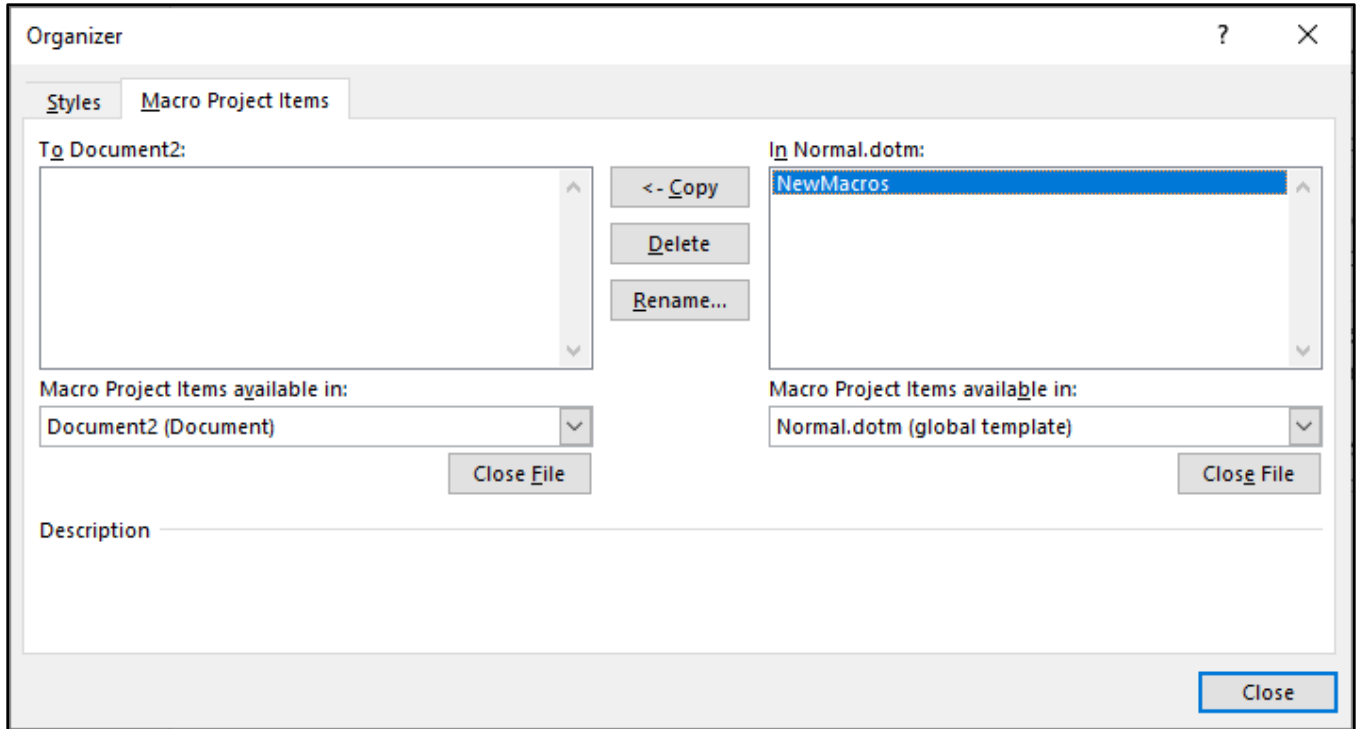



FIGURE 33-2

The **Organizer dialog** makes it easy to copy macros from one template to another (as well as styles). Note that you cannot copy individual macros, but you can copy macro modules. In the screenshot above, you can see that all of the custom macros I've created in normal.dot are in a module called NewMacros. By copying NewMacros into the other document, all of those macros become available within that template.

## Recording Macros

The easiest way to understand a macro is to record your own. To create a macro for the insertion of today's date:

1. In the **View ribbon** → **Macros group** → **Macro button** → **Record Macro**.
2. Type a name such as "DateEntry" as the **Macro name** (macro names can't contain spaces).
3. If you want, include a description of the macro so you can find it later.
4. Click on the **Keyboard button** to assign a keystroke.
5. Type the desired keystroke (such as **Ctrl + Alt + D**) in the **Press new shortcut key box**.
6. Click **Assign**.
7. Click **Close** (your macro will now start recording).
8. Select Insert ribbon → Text group → **Quick Parts button** → **Field** → **Date**, choose the desired format and click **OK**.
9. Click on the **Stop button**  in the status bar at the bottom of the screen.
10. Play your new macro by hitting **Ctrl + Alt + D** (or whatever key combination you chose) anywhere in your document.

## If You Make a Mistake while Recording a Macro

Word's macro recorder doesn't actually record the keystrokes you make; it records the results of those keystrokes. Therefore, if you make a mistake while recording a macro, simply correct the mistake and keep going. The macro will be fine.

## Playing Macros

To play (or run) an existing macro:

1. If the macro is not assigned to a keystroke, select **View ribbon** → **Macros group** → **Macros button** → **View Macros**.
2. Find and highlight the name of the macro in the **Macro name list**.
3. Click **Run**.

## Assigning a Macro to a Keystroke

1. Select **File menu** → **Options** → **Customize Ribbon**.
2. Click the **Keyboard shortcuts: Customize...** button at the bottom of the dialog.
3. Under **Categories**, scroll down until you see **Macros** and click once on it. On the right side, locate the macro you would like to assign a keystroke to and click once on it.
4. Place your cursor in the **Press new shortcut key box**, press the key combination you would like to assign to the macro, click the **Assign button** and then **Close**.

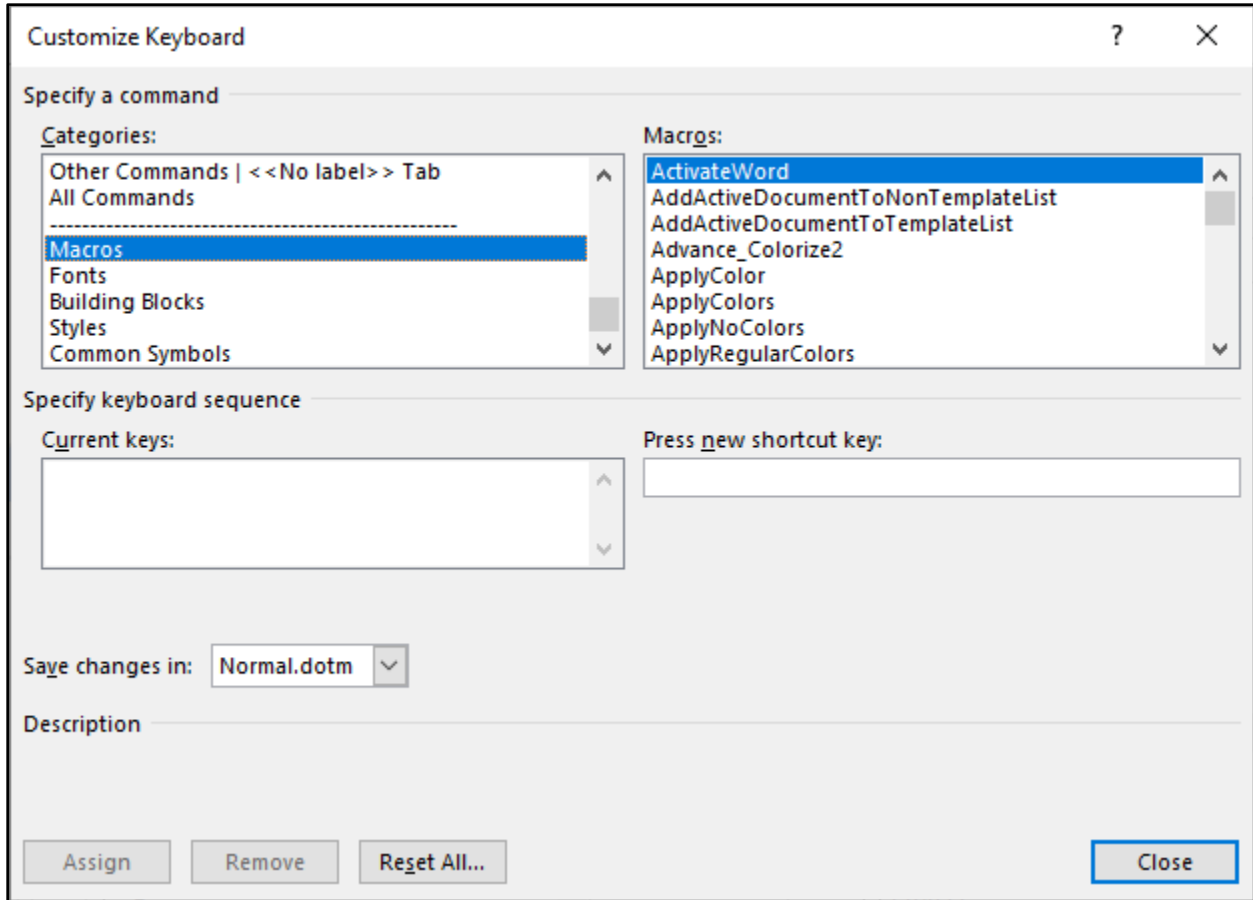


FIGURE 33-3

## Assigning a Macro to a Quick Access Toolbar Button

1. Select **File menu** → **Options** → **Quick Access Toolbar**.
2. Under **Choose commands from**, click **Macros**.
3. Locate the macro you would like to place on a toolbar, and add it to the quick access toolbar.

# CHAPTER 34

# TEMPLATES IN GENERAL

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## Adopting Uniform Standards for Your Organization

One of the first steps that an organization should take is to define standard document formatting, such as the organization's font name, size, etc. This will assure uniformity of outgoing documents so one side of the office is not using 12 point CG Omega, while the other side is using 10 point Times New Roman. This appears unprofessional and makes it more difficult for members of your organization to share documents.

### Templates Defined

A template is a special kind of file that provides a model for the underlying structure (or pattern) of a particular finished document (such as a Deed or Lease or Revocable Trust). Templates may also contain document settings such as AutoText entries, Quick Parts, fonts, key assignments, macros, menus, page layouts, special formatting and styles. When you create a new document based upon a template, you get a copy of the template, but not the template itself. In that manner, templates are protected and cannot be accidentally over-written with changes a user makes to a new document based upon one. In Word, a template can be a .dotx file, or it can be a .dotm file (a .dotm file type allows you to enable macros in the file).

### Why You Need to Use Templates

Maybe you think you have never used templates before, but in reality, every single document you've ever created in Word was based on a template. More importantly, templates are the basic component of any forms system and, if you aren't using a forms system in your practice, you're missing out on one of the fundamental benefits of a word processor. A forms system is important because:

1. It saves an enormous amount of time;
2. It ensures consistency in your documents, the style of which is part of your organization's identity;
3. It increases accuracy; and
4. It helps you convey your knowledge to others and makes it easier for new employees to learn your organization's drafting style.

### Two Basic Types of Templates

The two basic types of templates are global templates and document templates.

## Global Templates

Global templates contain settings that are available in every Word document. The Normal.dotm template is considered a global template. Remember that templates can store styles, AutoText entries, AutoCorrect entries, macros, toolbars, custom menu settings, and shortcut keys. If you have additional of those items (except styles) you would like to make available at any time in Word, then you can store them in global templates.

### Where Global Templates Must Be Stored

Global templates must be stored in:

C:\Users\USERNAME\AppData\Roaming\Microsoft\Word\STARTUP

## Document Templates

Document templates contain settings that are available only to documents based on that particular template. For example, if you create a fax cover sheet using a fax cover sheet template, you'll have access to the settings from both the fax cover sheet template as well as the settings in any global template. Word comes with many sample document templates and you can, of course, create your own.

### Where Document Templates Are Stored

Document templates are normally stored in:

C:\Users\USERNAME\AppData\Roaming\Microsoft\Templates

## Normal Template (Default)

Unless you specify a different template, Word bases every new document on the Normal template. Calling the template Normal doesn't mean that it's just some ordinary template. The Normal template is actually a file called normal.dotm and it can be customized and modified just like any other. Since normal.dotm is the default global template, much of your Word customization is stored in it (such as AutoText entries, fonts, key assignments, macros, menus, page layouts, special formatting, and styles). If the file normal.dotm is deleted, Word simply creates a new one the next time you run it, but you'll lose all of your macros and other items which were stored in it. Therefore, it is a good idea to make a backup copy of normal.dotm just in case something happens. To determine where Word is storing your normal.dotm file, click the **File menu** ➔ **Options** ➔ **Advanced** ➔ **File Locations button** under the "General" heading.

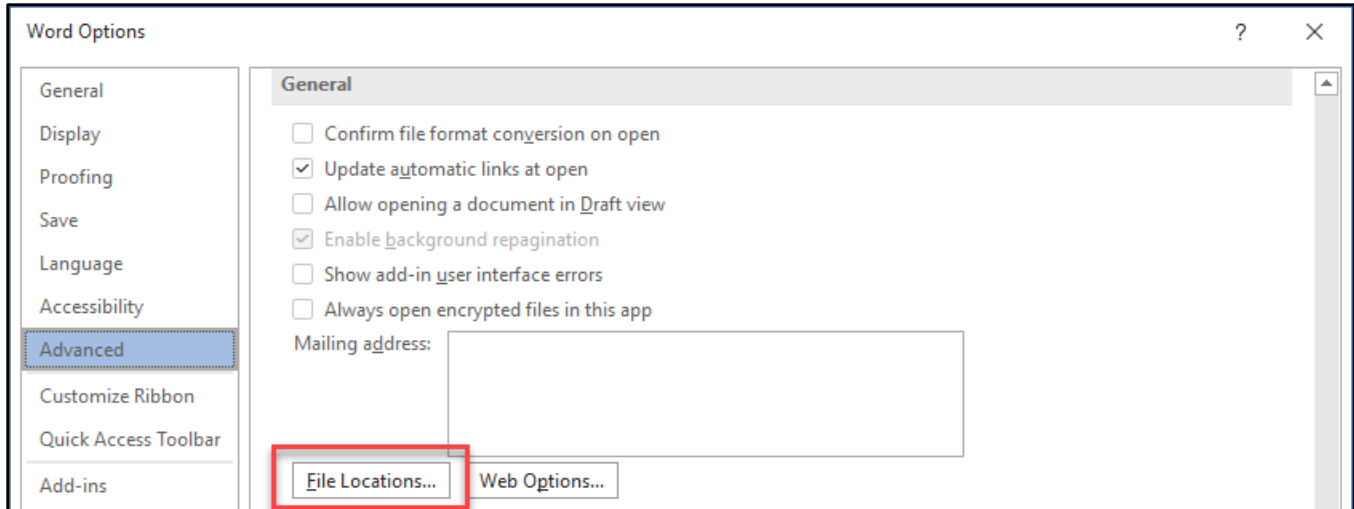


FIGURE 34-1

If you click on **User Templates**, and then click **Modify**, you'll see the folder where normal.dotm is stored.

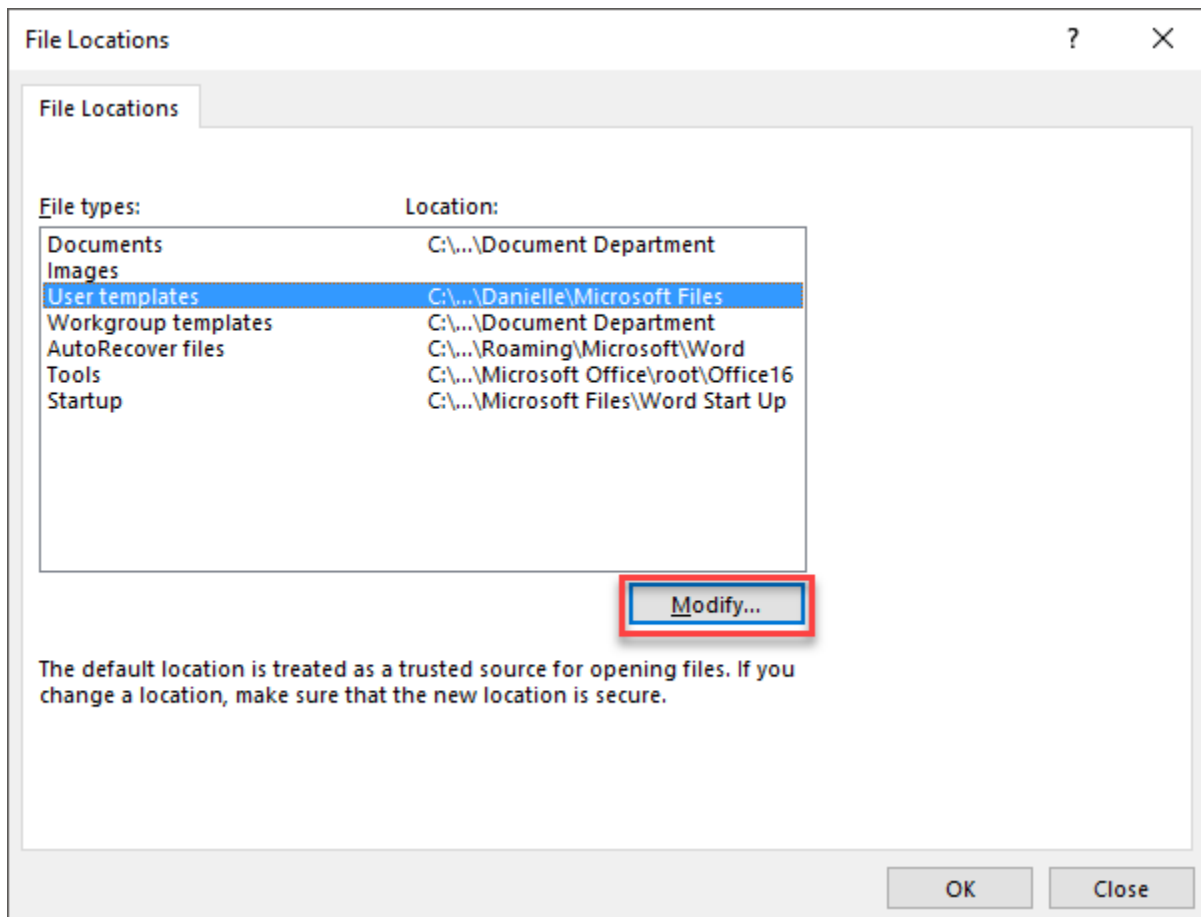


FIGURE 34-2

## Modify Your Normal.dotm Template

Word has several default styles that you may never need and the default font (on a new installation or new computer) is completely inappropriate in a legal environment (blue text, non-standard font such as Calibri). However, you can configure your Normal.dotm so that only the styles you are likely to use will appear in the styles pane. Just follow these steps:

5. First, open your Normal.dotm. In order to do this, first close all other documents in Word and make sure you've followed the instructions in Chapter 11 under the subheading entitled Un-Hide the Templates Folder and Show File Name Extensions (page 109) so you can see the folder in which the Normal.dotm file is stored and its file name extension. Once that is done, click **File menu** → **Open** (SK: Ctrl + O) → browse to the folder called C:\Users\[your logon or profile name]\AppData\Roaming\Microsoft\Templates → single click **Normal.dotm** → **Open**.
6. Next, open the Styles pane by clicking the **Home ribbon** → **Styles launcher** (see Figure 34-3 below) or the SK is **Alt + Ctrl + Shift + S**:

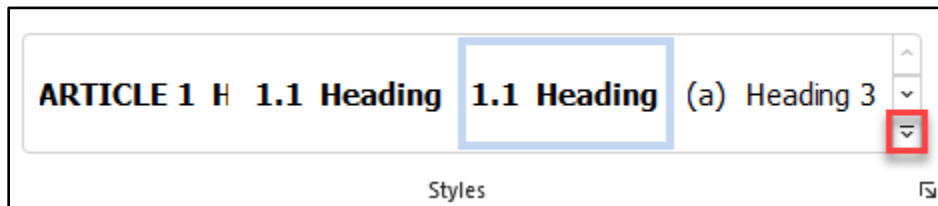


FIGURE 34-3

7. The styles pane will then be displayed with all of the default styles. Click the **Manage Styles** button.

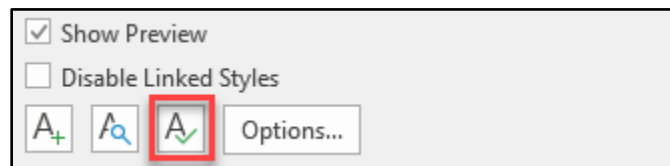


FIGURE 34-4

8. Click the **Recommend** tab and then change the Sort order to **As Recommended**. Click **Select All**. Click the **Assign Value** button → **OK** button (default will be to set everything to 1).

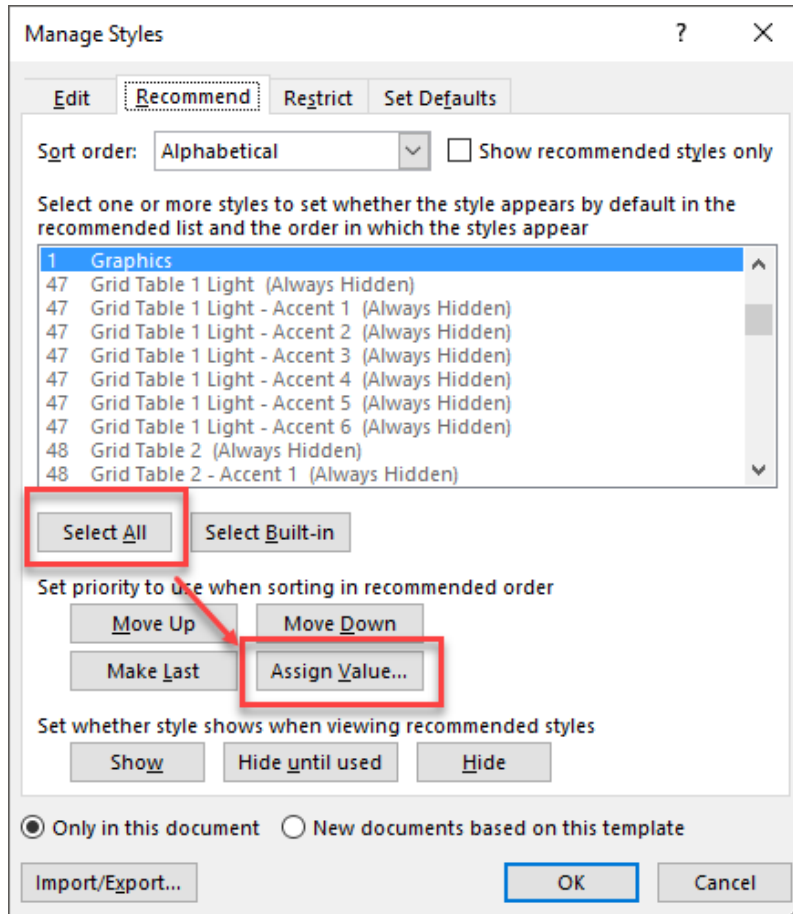


FIGURE 34-5

9. While the all styles are still selected, click the **Hide until used** button.
10. Finally, change the **Sort order** to **Alphabetical** and go through the list and select the styles you want to regularly appear and click **Show**. Some good styles to show would be Normal, Block Text, Body Text, Body Text 2, Heading 1 through Heading 4, List, Signature and Title. Click **OK**.

## Working with Templates

### Load a Template

Sometimes you're working on a document in which you need the automation and customization features you've created in some other template (i.e., something not the template your current document is based on). To load a template, follow these steps:

1. Click the **File menu** → **Options** → **Add-ins**.
2. In the **Manage** list, select **Word Add-ins** and click **Go**.



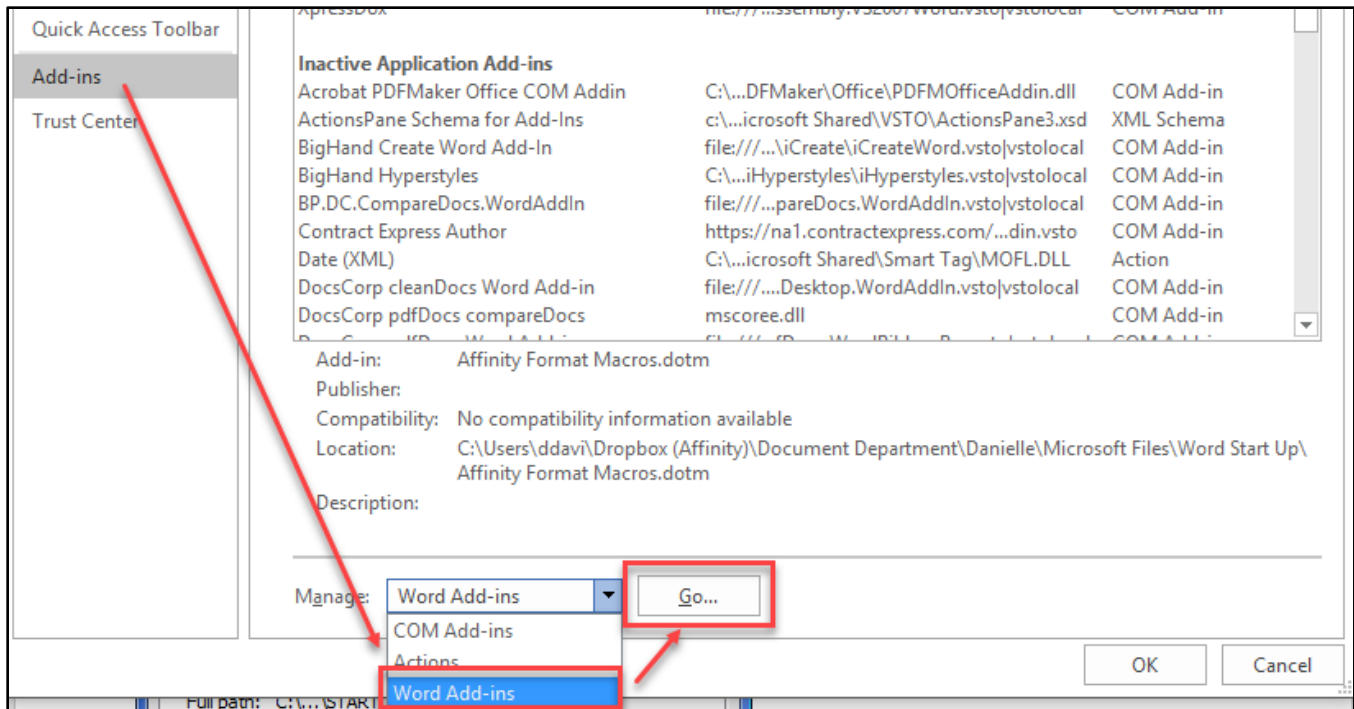


FIGURE 34-6

3. Click **Add**.

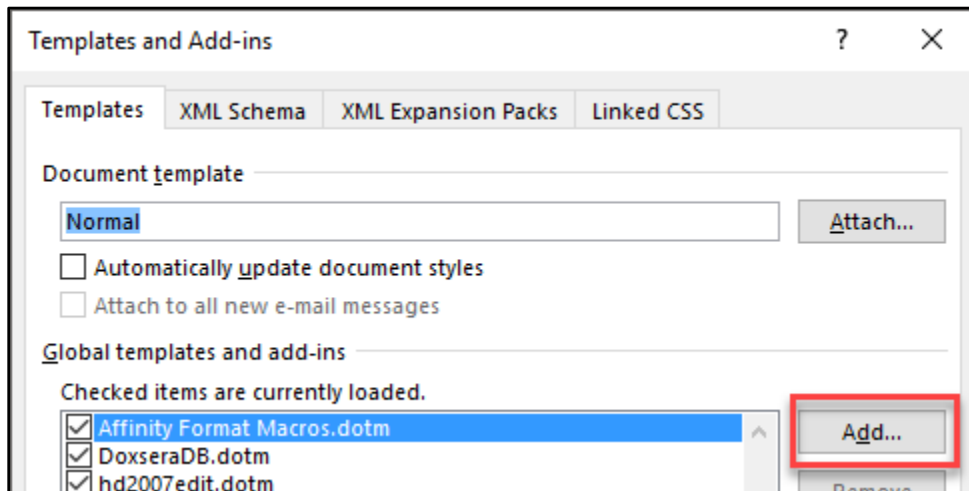


FIGURE 34-7

4. Switch to the folder that contains the template or add-in you want, click it, and then click OK.

## Global Templates

The default global template is normal.dotm and its features are available regardless of the document you're working in. However, you can create other global templates which would also be available no matter where you are in Word. To see a list of your current global templates, add new ones or remove existing ones, follow these steps:

1. Click the **File menu** → **Options** → **Add-ins**.

2. In the **Manage** list, select **Word Add-ins** and click **Go**.
3. Use the **Add** and **Remove buttons** as needed.

## Creating Templates

1. Create or open a document you would like to use as a template.
2. Click the **File menu** → **Save As**.
3. Change to the Trusted Templates folder (button on the left side of the Save As dialog)
4. Change the Save As Type drop down at the bottom of the dialog to .dotm or .dotx as appropriate.
5. Enter a file name.
6. Click the Save button.
7. Close the template before trying to use it.

## Using Templates

In order to create a new document based upon your template, you must follow these steps:

- Click the **File menu** → **Options** (left side, bottom) → **Save** (left side) → in the middle of the right side of the screen, you'll see a box that says **Default personal templates location**. Enter the folder where your templates are stored → click **OK** at the bottom of the screen.

If you're not sure where your templates are located, click **Start** → **Run** → and type **%appdata%\Microsoft\Templates\** in the box → click **OK**. This will open the folder where your templates are located, and you can just copy and paste the address into the aforementioned box.

- After this is done, when you click **File menu** → **New**, you'll see an option for PERSONAL templates.

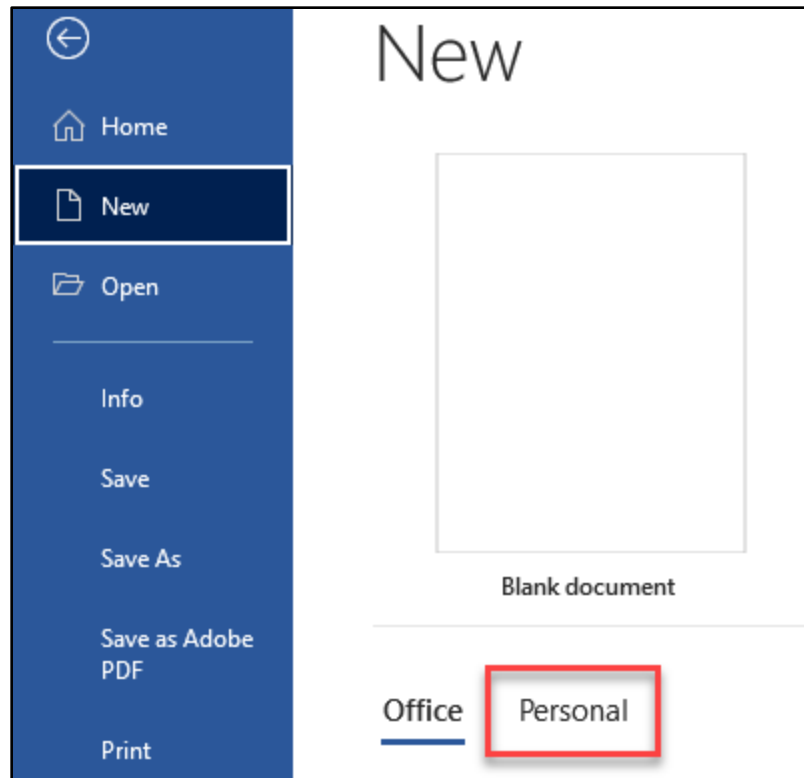


FIGURE 34-8

As an alternative to the foregoing, you can put the templates you create in ANY folder and use them by simply double-clicking them. If you double-click a Word document, Word opens the document itself for editing. By contrast, if you double-click a Word template, Word gives you a new, un-named document based upon the template; but it does NOT open the template itself for editing. Therefore, if you want to simplify the procedure outlined above for using templates, you could simply put them in a folder to which users have read-only access and put a shortcut to that folder on their Windows desktop. As such, they wouldn't be able to edit the templates even if they wanted to; and double-clicking any template in that folder would result in a new document being generated which is based upon the chosen template.

## Modify a Template

To edit a template, go to File, then Open... and change the Files of type designation (at the bottom of the Open dialog) to All Files or Document Templates. Browse to the folder that contains the template want to edit. Click once on the name of your template and click Open. Make whatever changes you would like to the template and save it.

## Sharing Templates

You can designate a "public" folder on your server where public templates are stored which are accessible by everyone. Follow these steps:

1. First, create the folder into which you'll save future public templates on a drive that everyone has access to (on your server). Note that only those who add or edit templates need full access to that folder. Everyone who simply uses those templates must only have read and list rights to the shared template folder. We recommend a folder name like x:\Word Templates (where "x" is a network drive.)

2. Now you need to tell Word where to look for these public templates. To do this, open a blank document in Word, click the **File menu** → **Word Options** → **Advanced** → **File Locations** button under the "General" heading.
3. Click on **Workgroup templates**, then click the **Modify** button below it. Choose the folder you created on the server and click **OK**.

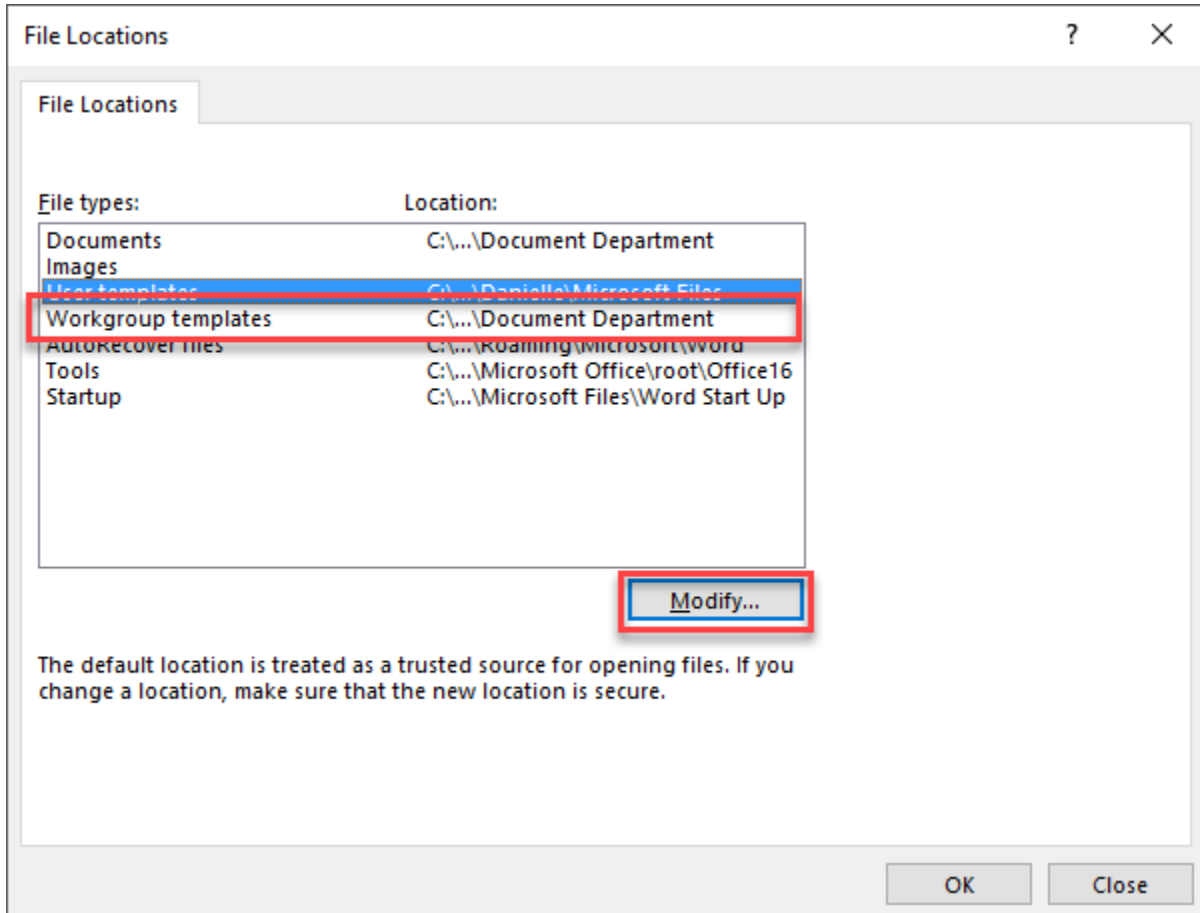


FIGURE 34-9

4. Note, you'll need to repeat step #3, above, on everyone's computer who will need access to these templates.

# CHAPTER 35

# FILLABLE FORMS

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Word fillable forms utilize Word merge fields to make document drafting more efficient and accurate. Fillable forms allow you to answer only a few questions and get a complete or nearly complete document. For example, you can ensure that all pronouns are correct by choosing the pronoun once and having Word populate every pronoun in the entire document automatically. Simple logical changes can be made throughout a document based upon how a question is answered as well. For example, you can create a drop-down/multiple choice field for Defendant or Defendants (depending upon whether there is more than one Defendant). After the user chooses an option, the form can automatically enter the correct verb conjugation. For example, "The Defendant is represented by counsel." or "The Defendants are represented by counsel."

## Creating a Form

To create a Word form:

### Step One - Create a Template.

It is probably easiest to pull up an existing document you created for a client which is a good representation of the variety you use most often. To create a template from an existing document:

1. Open the document.
2. In the file menu, click on **Save As**.
3. Click on **Browse**.
4. Change the **Save as type** to **Word Macro-Enabled Template (\*.dotm)**.
5. Select the desired location. You must do this *after* you change the file type. Changing the file type to a template file will change the location to Word's template folder.

### Step Two - Show Field Codes

Some field codes are invisible while creating your template unless they are toggled on. The easiest way to toggle on field codes is to use the keyboard shortcut **Alt + F9**. When field codes are toggled on, you'll see the "back-end" code and be able to create calculations throughout the template.

When testing your template or using it to draft document, you'll want to toggle the field codes back off. Using the keyboard shortcut **Alt + F9** again will toggle them back off.

### Step Three - Enable the Developer Tab/Ribbon.

The Developer ribbon is hidden by default. To enable it:

1. From the **File menu**, click on the **Options button**.
2. Click on **Customize ribbon** on the left side.
3. Under **Customize the Ribbon**, check the box for **Developer**.

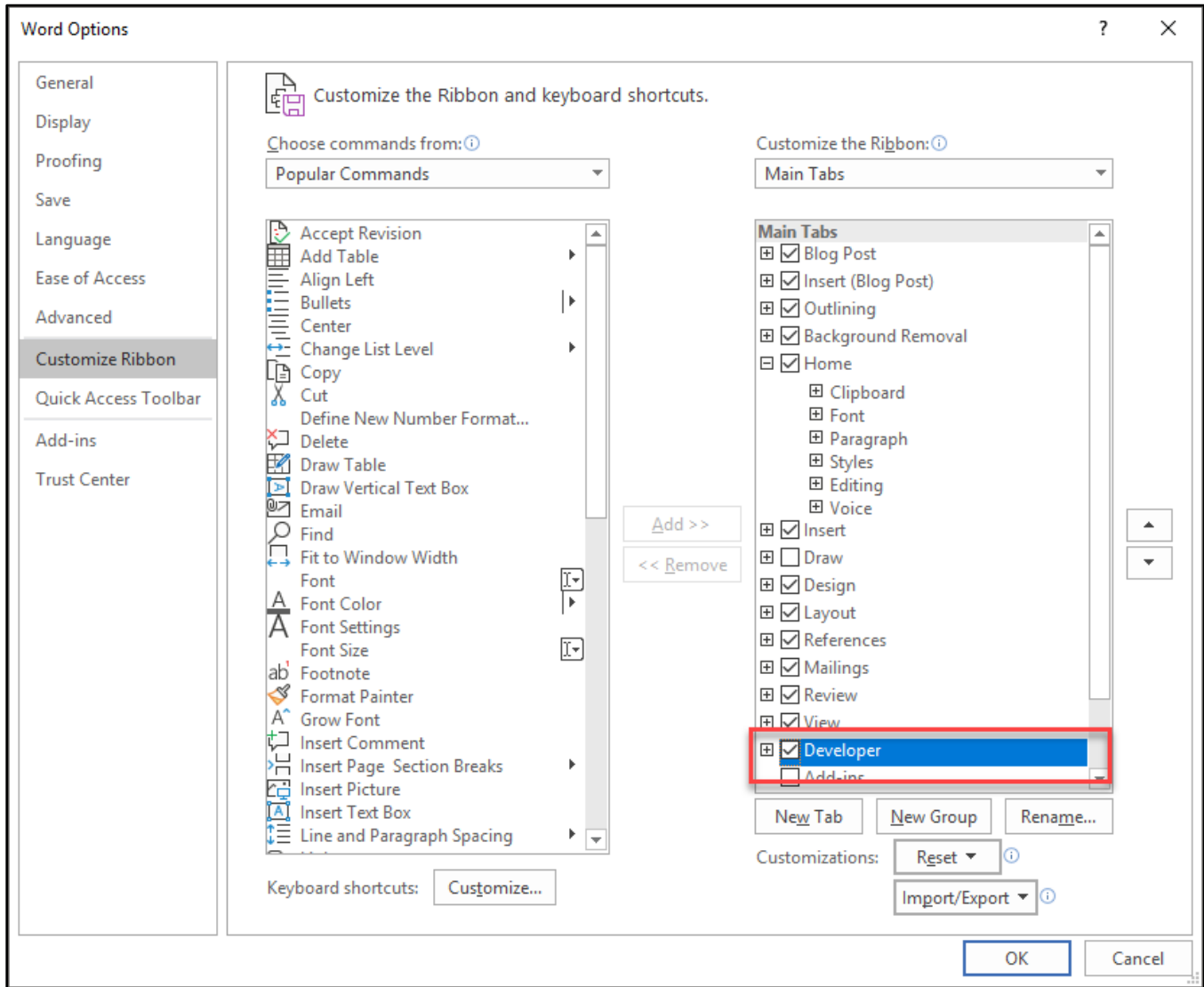


FIGURE 35-1

## Step Four - Create a Spot to Enter Data

If you add a table for data entry at the top of the form, it's easier to enter all of the data at once when drafting the document. With a simple macro, Word can delete the table when you're done.

Your table might look something like this:

Plaintiff Name:	
Plaintiff Street Address:	
Plaintiff City, State & Zip:	
Plaintiff County of Residence:	
Plaintiff Gender:	

Defendant Name:	
Defendant Street Address:	
Defendant City, State & Zip:	
Defendant County of Residence:	

See Chapter 40 for instructions on how to create a table.

## Step Five - Insert Fields

Legacy Form fields work better than content controls. You'll find the Legacy Form fields on the Developer Ribbon, in the Control Group.

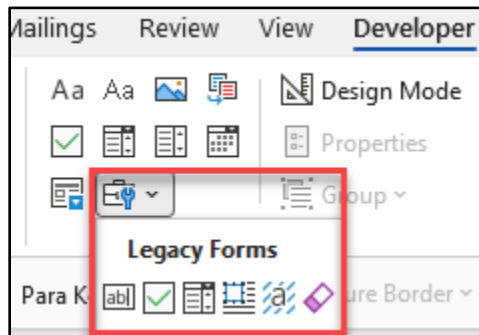




FIGURE 35-2

Click on the  button to insert a free form text field or the  button to insert a multiple choice field.

## Set Field Properties

After inserting a form field, double-click it to set or edit properties for each field (this is explained in greater detail below). You can also add Help or automation to a form in the field properties.

## Turn Off Field Codes After Fields Are In

After you have all of your fields placed, turn off the field codes by hitting **Alt+F9** again.

## Protect the Form

Prepare the form for use by protecting it. To do this, click the **Restrict Editing** button which is on the Developer ribbon.



FIGURE 35-3

A pane will appear on the right side of the screen. Check to enable **Editing Restrictions**, and choose **Filling in forms** from the drop down list below. Click the Yes, Start Enforcing Protection button. It will prompt you for a password, but don't enter one - just click the OK button.

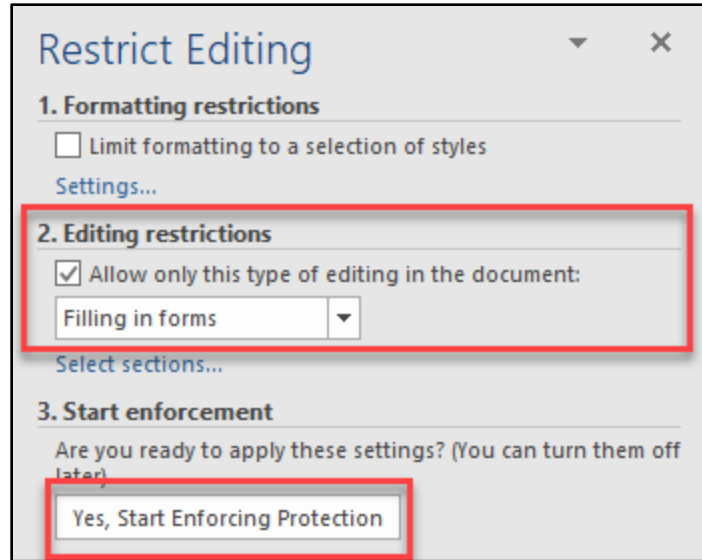


FIGURE 35-4

## Close the Form


In order to “launch” a form, it needs to be saved and all you need to do in order to assemble a new document based upon the form is to double-click it. So don’t test it while you’re editing it or you’ll have to spend a lot of time clearing responses out of the fields.

## Test the Form

Double click the template to launch it. Because you protected it in a previous step, your cursor will only land in the data entry fields. Click the TAB key on your keyboard to advance to each subsequent field.

## Form Field Descriptions and Uses

I realize that there six buttons on the Legacy Forms mini toolbar, but you’re only going to use two of them.

- **Text/Date/Number Form Fields:**  - This field can be used for text, number, date, the current date, the current time or a calculation. As you can see from the Properties dialog below, you have many controls for text form fields. It is very important that you not leave the bookmarks as their defaults (like Text1). You can't have spaces in the bookmark names, but you can use underscores. Once you pick a type of field, you can choose a format that is appropriate.



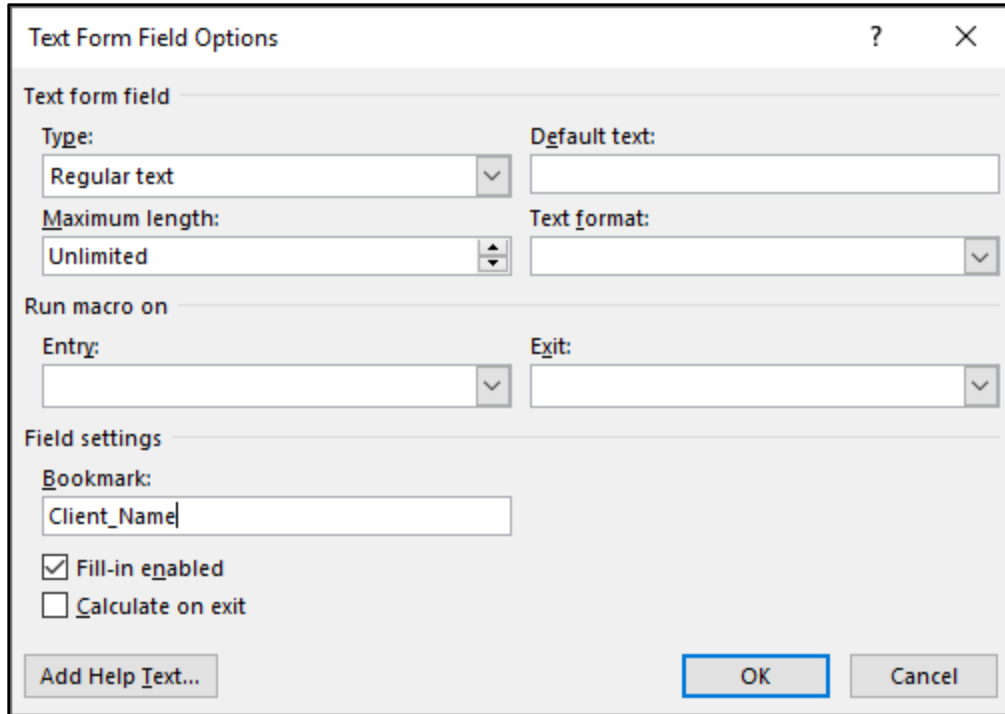



FIGURE 35-5

- Drop Down Form Field:**  - This field allows you to create a multiple-choice for the user. To add options to the drop down, enter them under the Drop-down line. Then click the Add button. Unfortunately, you cannot create a select-all-that-apply variable (this is select only one). This can also be used to create a True/False or Yes/No question.

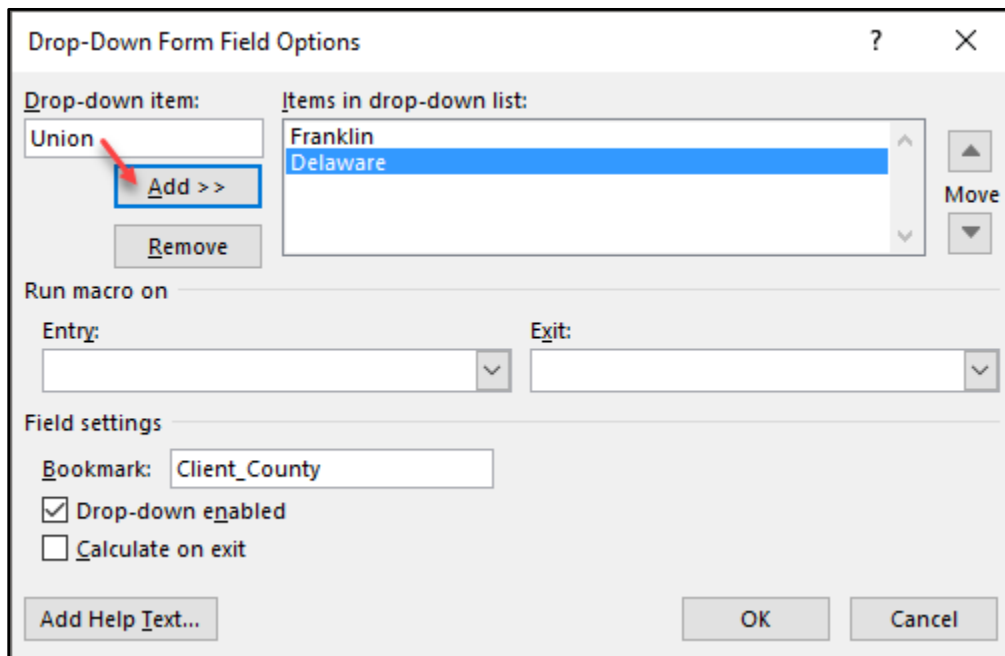


FIGURE 35-6

## Advanced Techniques:

### Repeat the Result of One Field in Other Places in the Document

There are many times in which you want the same answer supplied in one field to appear in multiple other fields in the document. For example, when a client's name appears multiple times in a form, you only want to have to enter that name once. When you drop a text field into a template, Word automatically inserts a corresponding bookmark. You can use that bookmark to drop the result of that field elsewhere in the document. Just follow these steps:

Insert a text field into your template. After you've inserted the field, double click the field to view its properties in the Text Form Field Options dialog. Note the name of the bookmark (in this example below, Client\_Name) and check the Calculate on exit box. If you use a table of data-entry fields at the top of your form, it's essential that you check this box on every field that you enter into the form because they'll all be used later.



FIGURE 35-7

Now place your cursor somewhere else in the form where you would like to repeat the answer to this field.

On the Insert ribbon, click the **Quick Parts button** → **Field** → In the **Field names list**, click Ref. Select the appropriate bookmark, then click **OK**.

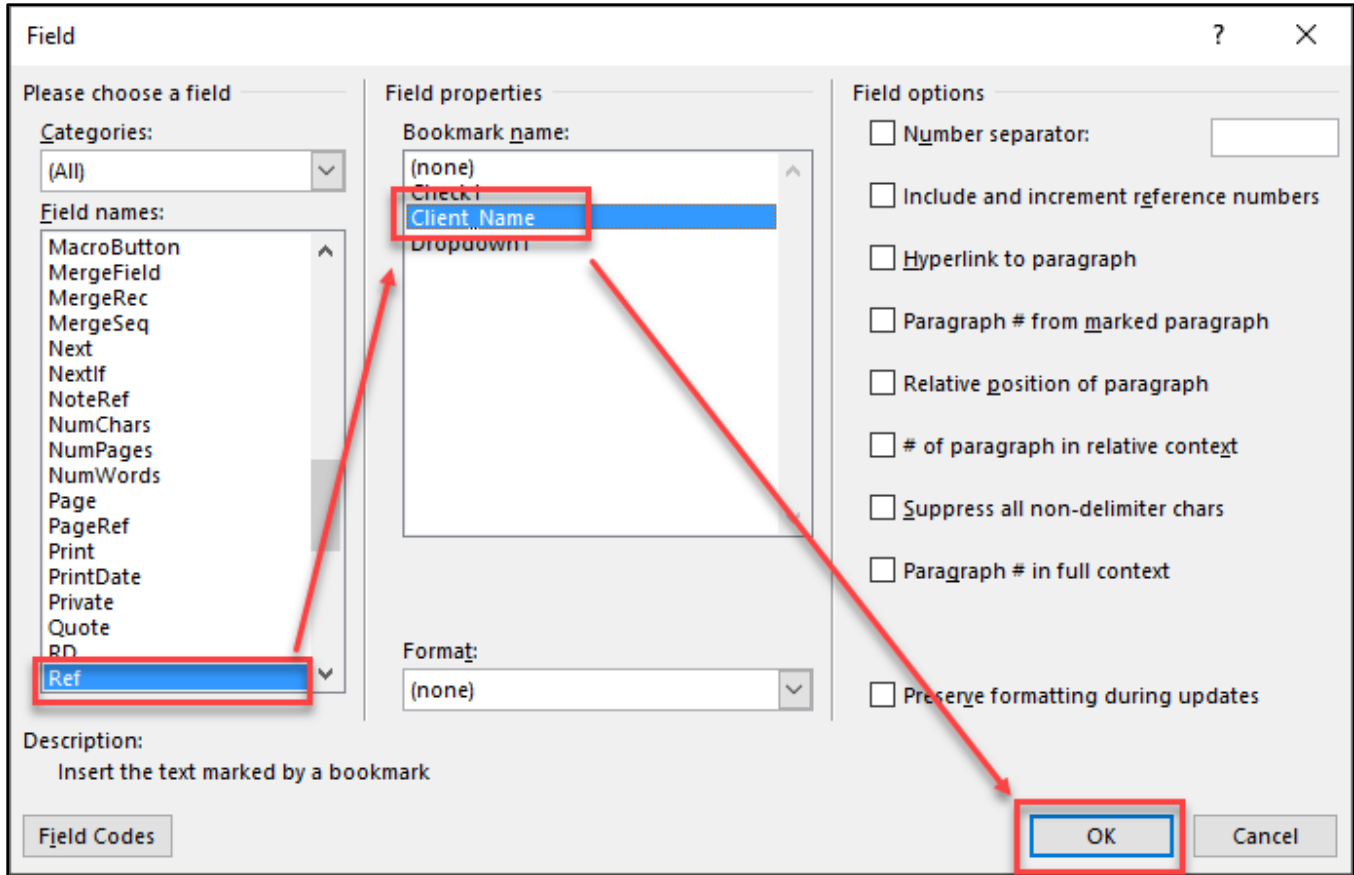


FIGURE 35-8

Don't forget to protect the form. Save the form template, close it and generate a new document from your template to test.

## Making Fields Conditional Upon Another Answer

Let's say your form has a drop-down field which presents the user with the option of Defendant or Defendants. A sentence in the document says, "The Defendant in this matter has been served with process." Of course, if there is more than one Defendant, the subject and verb of the sentence would change to this: "The Defendants in this matter have been served with process."

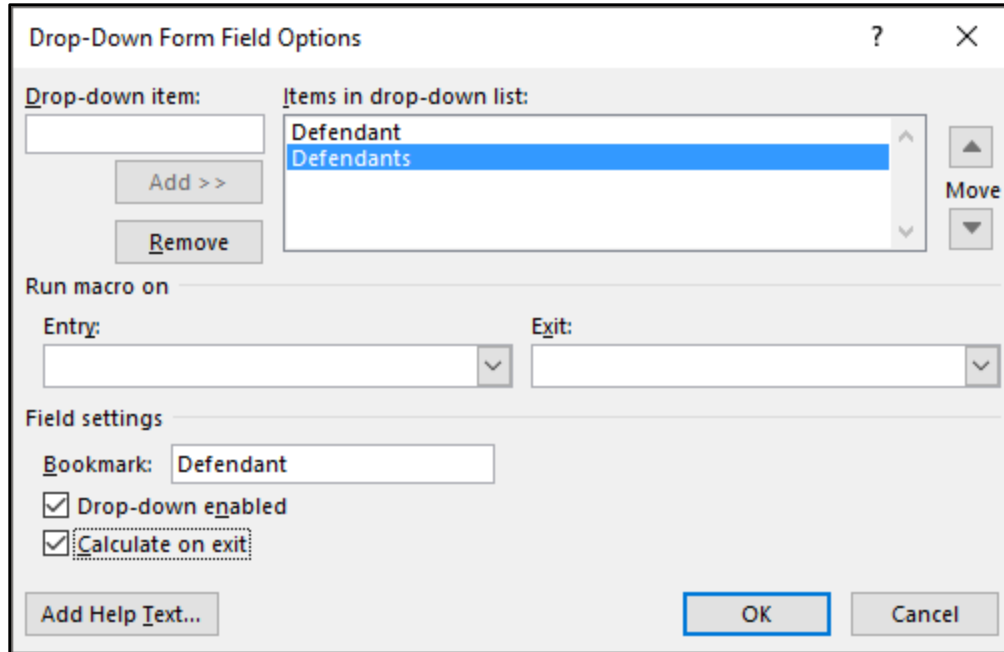


FIGURE 35-9

Of course, you can easily create a drop-down field for the Defendant/Defendants option. In the perfect world, that choice would automatically change the verb conjugation from has to have as appropriate. Well, you can set up your form to do that kind of thing. It's not exactly a user-friendly setup, but it works very well. Here are the steps:

1. Setup a Drop-Down form field to replace the word Defendant. Add the two options, change the Bookmark name to "Defendant," and don't forget to check "calculate on exit" as this is necessary for it to work.
2. Now delete the word "has" from the sentence. Position your cursor between the words "matter" and "been" and hit Ctrl+F9. A field will appear with brackets in them like this { }.
3. Put your cursor between the brackets and type IF.
4. Hit Ctrl+F9 again to insert another set of brackets (these being nested). Now it looks like this: { IF { } }
5. Position your cursor between the nested brackets and type "Defendant" (the name of the bookmark you assigned to the drop down field).
6. Now move your cursor outside the nested brackets and type: = "Defendants" "have" "has". The whole thing should look like this: { IF { Defendant } = "Defendants" "have" "has" }.
7. The IF field is evaluating whether the Defendant bookmark is equal to "Defendants." If it is, it will output the first option, in this case "have." If it is not equal to "Defendants," it will output the second option ("has").
8. Protect the form, save it, close it and try generating a new document based upon your template. If you did it correctly, the have/has will change automatically depending upon what you choose for Defendant/Defendants. Don't forget that you have to hit a TAB key in order for it to take effect.

## How To Handle Quotation Marks In Conditional Text

If the text you have in an IF field has quotation marks in it, the assembly won't work (as you'll discover). However, if you replace the quotation marks with { Quote 34 } fields, it will insert quotation marks where you want them. You just hit Ctrl+F9 and type Quote 34 in the middle of the field.

IF Fields Based On Numbers or Multiple Choice Fields: If you want to test on the response to a number field (such as number of children), you just enter the number in the field. For example:

**{ IF { NumberOfChildren } = 1 "The client has one (1) child." "" }**

However, if you're testing on the response to a multiple choice (such as client gender), then the response has to be in quotation marks. For example:

**{ IF { ClientGender } = "Male" "his" "her" }**

### IF Fields Testing on Multiple Conditions

In this example, assume that I have a multiple choice called WillType (What type of will do you want to generate?) with options of Pourover and Simple. Assume further that I have another multiple choice called CharitablePledges (Does the client want to make charitable pledges?) with options of Yes or No. Now let's assume that I have a paragraph that only comes in if the WillType is Pourover and CharitablePledges is Yes. The field would look like this:

**{ IF { = { IF { WillType } = "Pourover" 1 0 } \* { IF { CharitablePledges } = "Yes" 1 0 } } = 1 "This is the text that comes in if both conditions are true." "" }**

### Automatically Unlock the Form and Delete the Table

When the user exits the last field in the form, you can write a macro which automatically unprotects the form so that the user can type wherever they want *and* removes the data entry table at the top of the form. It's rather complicated, but here are the steps:

1. Edit your form.
2. Make sure there's a blank line above and below your data entry table in the form. Beginning with the blank line above the table begin selecting the text and select the entire data entry table plus the blank line below the table.
3. Now click the **Insert ribbon → Bookmark → Call the bookmark Test → click the Add button**. This will surround the data entry table with the bookmark and our macro will select the bookmark (thereby selecting the entire table) and delete it once the document is completed.
4. Now click the **View ribbon → Macros button → Record macro...**
5. In the next dialog, call the macro UnlockForm and make sure you Store macro in the template you're editing.

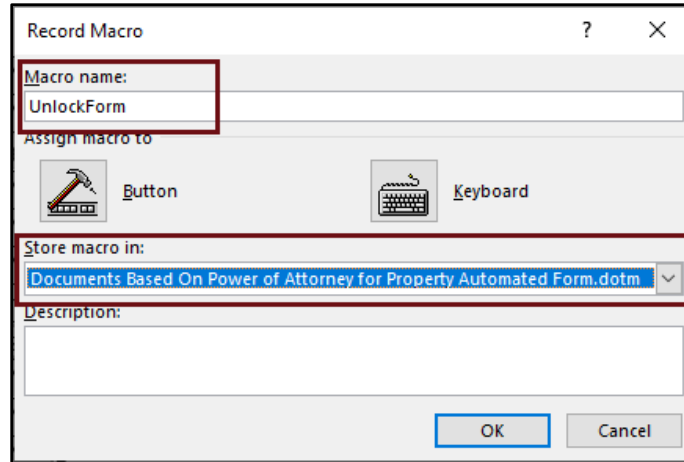



FIGURE 35-10

6. As soon as the macro has begun recording, stop recording by clicking the  button on the status bar at the bottom of the screen.
7. Now edit the macro by clicking **View ribbon**→**Macros button**→**View Macros**→find the macro you recorded and click **Edit**. Between the Sub and End Sub lines, add this:

```
ActiveDocument.Fields.Unlink
ActiveDocument.Unprotect
Selection.HomeKey Unit:=wdStory
Selection.GoTo What:=wdGoToBookmark, Name:="Test"
With ActiveDocument.Bookmarks
.DefaultSorting = wdSortByName
.ShowHidden = False
End With
Selection.Delete Unit:=wdCharacter, Count:=1
```

8. Now click **File menu**→**Close** and return to Microsoft Word.
9. Now locate the last field the user enters information into in your form and double click the field to open the properties.
10. Under "Run Macro On" click the drop down under Exit and choose the macro you created.
11. Protect the form.
12. Save and close the form.

## Get Formatting to Stick To A Ref Field

Let's say you want the client's name to appear in bold in the document you're automating. You can put in the Ref field for ClientName and apply bold to it. You'll find that while it looks bold when you're editing the form, when you test it, the name will come out like this: John L. Doe. The first word of the name will be bold and the rest of it will not. The trick to getting this to work is to add a special \\* Charformat to the field. In other words, if your field looks like the following, you'll get the whole name in bold:

**{ REF ClientName \\* MERGEFORMAT \\* Charformat }**

## Testing on Whether a Field is Answered

Let's say you have a field for the agent's relationship to the principal. However, it is sometimes left unanswered and you don't want blanks showing up in the resulting document. Let's say it looks like this now:

```
{ REF RelationshipToClient }, { REF ClientName }
```

If a field is unanswered, it produces five (5) spaces. Therefore, you can test on whether the result of the field is five spaces in a row. By selecting the relationship field and the comma and space afterwards and hitting Ctrl+F9, you can surround that with a field. When you're done, it should look like this:

```
{ IF { RelationshipToClient } <> " "{ REF RelationshipToClient }, " "" }{ REF ClientName }
```

The less than, greater than (" $<>$ ") you see in the middle means NOT equal to. So the foregoing says "if the response to RelationshipToClient is NOT five spaces (meaning it was unanswered), then put in the relationship, plus a comma and space afterwards. Otherwise, enter nothing ("").

You can also use this technique to enter a blank if something is unanswered. For example, let's say you have a field for **{ DateOfExecution }**, but it is sometimes unknown. Your code would look like this:

```
{ IF { DateOfExecution } = " " " " "{ DateOfExecution }"  
}
```

## Complete a Form

Remember that you need to close your form, then double click the template in order to launch a new document based upon the template.

## Editing Fields

There are many times when your field isn't producing what you hoped for or the formatting is incorrect. You can easily edit a field and add what are called Merge Field Switches to change how a field is formatted.

### Example

Assume you have a field called ClientName. Regardless of how the user responds to the question, there are some places in the document where you want the name to appear in all caps and others where you want first letter capped. First, you'd create the ClientName variable in your data table:

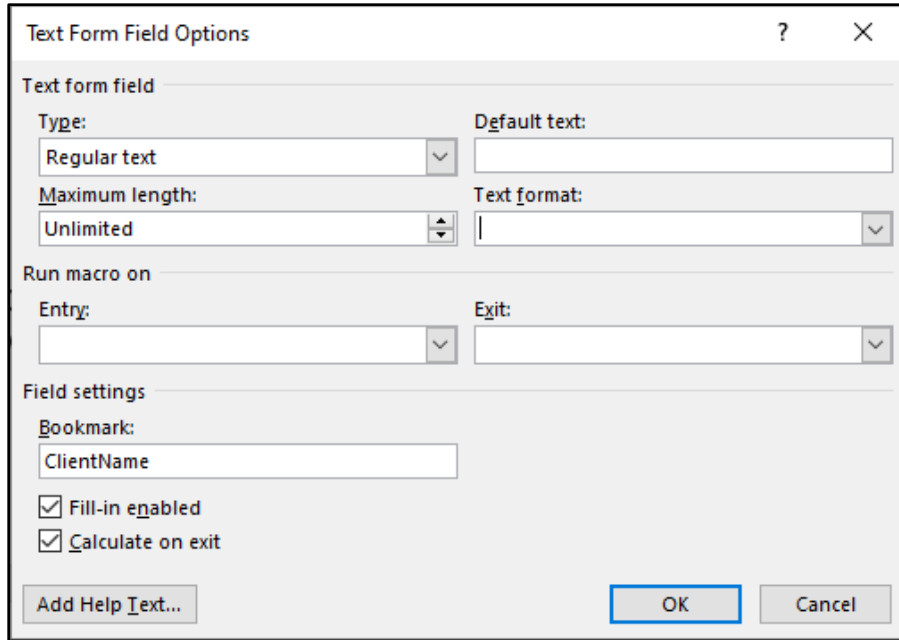


FIGURE 35-11

Now you insert a Ref field that pulls in the response:

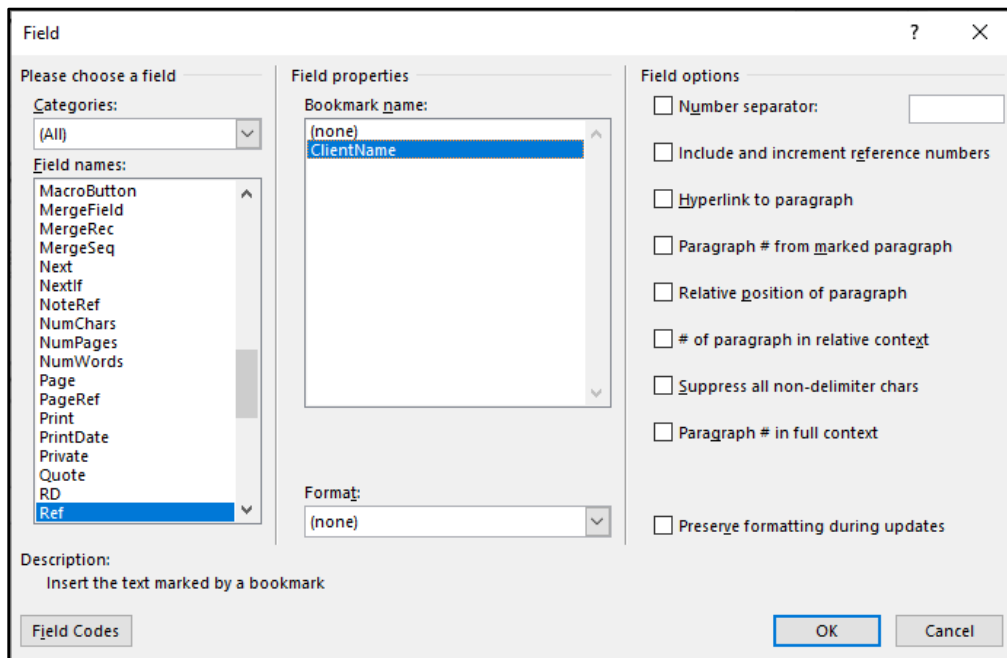


FIGURE 35-12

With Show Field Codes turned on, the field looks like this: **{ REF ClientName }**. In this case, since no formatting was applied to the field, the name will appear however it is typed. Let's assume in this case that you want the name to appear in all caps regardless of how it was typed. To change its format, right-click the REF field → choose **Edit Field** → click the **Field Codes** button at the bottom of the screen. Now after the field name (with a space after the field name) type **\\* Upper** (there's a space after the asterisk). Now your field will look like this: **{ REF ClientName \\* Upper }** and at least in that particular insertion point, the name will be formatted all caps regardless of how it was typed in the original data field.



## Useful Merge Field Switches:

### Text String Formatting:

\* Caps	Capitalizes the first letter of each word.
\* FirstCap	Capitalizes the first letter of the first word.
\* Upper	Capitalizes all letters.
\* Lower	All letters are in lower case.

### Format Numbers As Text:

\* CardText	Converts 3 to three, for example; to make the first letter capped, you can add the \* FirstCap as well
\* DollarText	Converts 4.32 to four and 32/100
\* Ordinal	Convers 14 to 14 <sup>th</sup>

### Format Dates: All date formats have to begin with \@ instead of \\*.

\@ M	Displays the month as a number without a leading zero
\@ MM	Displays the month as a number with a leading zero
\@ MMM	Displays the month as a 3 letter abbreviation (Feb.)
\@ MMMM	Displays the month as full text (February)
\@ d	Displays the day as a number without a leading zero
\@ dd	Displays the day as a number with a leading zero
\@ ddd	Displays the day as a 3 letter abbreviation (Tue.)
\@ dddd	Displays the day as full text (Tuesday)
\@ yy	Displays the year as a number of two digits (2006 = 06)
\@ yyyy	Displays the year as a number of four digits (2006)
\@ "MMMM d, yyyy"	Displays the date as July 23, 2020
\@ MM/dd/yyyy	Displays the date as 07/23/2020 (quotation marks aren't needed if you're only displaying numbers)

# CHAPTER 36

# MAIL MERGE

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Mail Merge is a great tool when you need to create a set of documents, labels, or envelopes. Typically, it is used when you have a list of names and addresses, and you need to produce one letter, label or envelope for each name/address.

## Steps In a Mail Merge

To make this easier to understand, let's use the example of sending a letter to 10 people. You have 10 names and addresses in an Excel spreadsheet and a letter in Word.

1. **Set Up the Main Document:** The main document (also known as the merge file) is the letter in our example.
2. **Connect to a Data Source:** In our example, this is the Excel spreadsheet containing the names and addresses.
3. **Select Recipients or Items:** This is optional and you only need to do it if the data source you're pulling from has more records in it than you intend to merge into letters.
4. **Add Fields In the Main Document:** You need to add the appropriate fields to the main document so that the data has a place to go.
5. **Preview and Complete the Merge:** You can see the results of the merge before actually generating new documents. When you're ready to execute the merge, you can either generate a new document or send the resulting new documents directly to your printer.

## Mail Merge Example

In this example, we'll use a spreadsheet containing 10 names and addresses of estate planning clients for a law firm. The main document is going to be a letter to each client asking them if they would like to update their estate planning documents since it has been over 5 years since they executed the current documents. Follow these steps:

1. Open the letter in Word.
2. Click the **Mailings ribbon** → **Start Mail Merge group** → **Start Mail Merge button** → choose **Letters**.
3. Click the **Mailings ribbon** → **Start Mail Merge group** → **Select Recipients button** → choose **Existing List**. Browse to the spreadsheet and when you see the dialog below, choose the worksheet with your data and click **OK**.

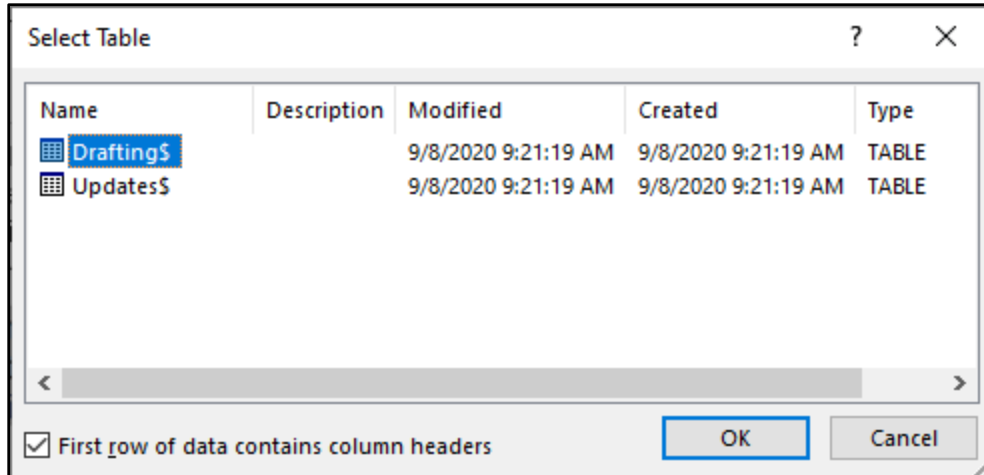


FIGURE 36-1

4. If you want to refine the list of names and addresses you're going to merge, then click the **Mailings ribbon** → **Start Mail Merge group** → **Edit Recipient List button**. From there, you can sort, filter, find duplicates, or find a particular recipient in the list. If you mail merge with only certain recipients, make sure that only the boxes next to the recipients you want are checked.
5. Add your fields to the main document by clicking the **Mailings ribbon** → **Write & Insert Fields group** → **Insert Merge Field button** → select the name of the field you would like to insert into the document. Positioning the fields appropriately in the main document. Now my address block looks like this:

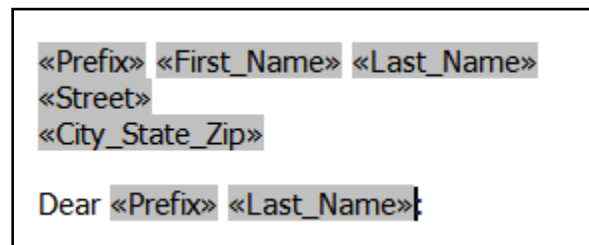


FIGURE 36-2

If you're working from a list in Excel, the field names will be the top row of your spreadsheet. You should set up your spreadsheet so that each column is labeled in the first row if your spreadsheet is not already set up that way.

6. Click the **Mailings ribbon** → **Preview Results group** → **Preview Results button** to make sure everything is working properly. If so, then click the **Mailings ribbon** → **Finish group** → **Finish & Merge button** and choose **Edit Individual Documents**. Note that your main document can be saved and used again for future merges.

# CHAPTER 37

# REBUILDING DOCUMENTS

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## We've All Been There

You have to work with a document which is a train-wreck. Every time you touch it, the formatting gets worse. This chapter will give you a detailed progression for fixing even the biggest mess of a document. **This will take a bit of time, but it is worth it.** Remember these points:

- Once the document is fixed, it will be *easy* to work on and edit; otherwise, you can waste hours trying to get an incorrectly constructed document to look the way you want.
- If you don't de-construct the document and fix it, the problems you're experiencing will persist and likely become worse.
- The more you fix documents, the better you'll understand Word and the faster you'll be at this task.

## Step One - Download Our Sample Document to Work Through This progression

There are a lot of steps in this process, and it will be extremely helpful if you download a test file and follow along. You can download the file referenced in the following steps here: <http://bit.ly/2wD1kTn>. You will have to enter your email and name, but your information will never be distributed or sold to any other individual or company, and Affinity Consulting will never contact you. The name of the file you'll download is **Word File To Be Rebuilt.docx** and it's a short **Nondisclosure and Nonuse Agreement**.

## Step Two - Turn on Show Hide

Open the subject document in Word. Even if you can't stand to have it on normally, you must have Show/Hide turned on when you're trying to fix a document. Otherwise, you're going to miss a lot of things that are going to cause you problems later. In the **Home ribbon** → **Paragraph group** → click the **Show/Hide button** ¶.

## Step Three - Determine If You Need to Start With a New Document

"Start with a new document" means (a) create a new (blank) Word document, (b) copy the text from the existing document and (c) paste the without any formatting into the new document. By doing this, you lose any digital baggage that might cause the re-built document to be unstable. However, you also lose all formatting, section breaks, footnotes, endnotes, clipart, and automatic paragraph numbers, among other things. However, it is still worth using this approach

in almost all cases. Here are some document issues that might cause warrant starting over with a new document:

1. The document has been around for years and has been used and re-used over and over. In law offices, most new documents are generated from existing documents. This recycling of documents can cause instability and unresolvable formatting issues.
2. The document was once in WordPerfect format and was converted somewhere along the way.
3. The document has an unusually large file-size (in bytes) relative to its number of pages.
4. Users of the document complain that Word sometimes freezes when editing the document or that the document would not accept formatting.

**When in doubt, start over. This should be about 99% of the time.**

## Step Four - Make A Copy or Create New File

### Paste The Text into a New Document If Starting Over

As mentioned above, it is highly recommended to start with a new document and not try to fix an existing document in its current container (a Word document is a container of content and formatting). If you have any worries about stability with the document you're re-building, then you're better off starting over. To do this, follow these steps:


1. Create a blank new document in Word (**Ctrl+N**), and save it as a new file (such as Nondisclosure Agreement.docx).
2. Select and copy the text from the file you downloaded in **Step One** above.
3. Paste it with no formatting into the new document. To strip off all formatting when you paste, Click the **Home ribbon** → bottom half of the **Paste button** (see Figure 37-1) in the **Clipboard Group** → click the  **button** (Keep Text Only). The text will assume the formatting of the target document and will be stripped of all graphics and other bothersome formatting characteristics.



FIGURE 37-1

4. After you've pasted in your raw text, make sure you re-save the document.

### Make A Copy If Not Starting Over

If you're going to try to fix the existing file without copying its text into a new document (don't do it), then make a copy of it first and make sure you're using the .docx file format (rather than .doc). You want to preserve a copy of the document you intend to fix in its original state for reference purposes.

## Step Five - Take Notes About the Formatting You Want to Replicate

Most of the time, you can look at a train-wreck document and get a pretty good idea of the formatting intent of the original author. You can replicate anything, but it will help you to take a few notes about what you see in the original document. If you look through the document before you begin, and take note of the formatting you need to create, it will save you time overall. Most documents (even those with complex formatting) require less than 12 types of unique formatting. For example, let's work through the document you downloaded. Here's what I would note:

1. **Title:** See Figure 37-2 below and the text I've put a rectangle around. This is the first type of unique formatting we encounter in the document. Its characteristics are as follows:
  - Times New Roman 12 pt, bold, underlined, caps, centered and single spaced.
  - It also needs automatic paragraph spacing of 12 pts after each paragraph (see Spacing Between Paragraphs on page 160 above). Although the vertical space between the title and the first paragraph in our original document was created by an extra hard return, it *should* have used automatic paragraph spacing.
  - It needs paragraph glue (see Holding Lines and/or Paragraphs Together on page 161 above). The title in the original document did not have Keep with next or Keep lines together applied, but it *should* have. As such, we're going to add those things.

**NONDISCLOSURE AND NONUSE AGREEMENT**

This Nondisclosure and Nonuse Agreement (the "Agreement") is made this \_\_\_ day of \_\_\_\_\_, 2000, by and between Jerry E. Dymond, Jr., and Planners Educational Alliance

FIGURE 37-2

2. **Un-Numbered Paragraphs with First Line Indents:** See Figure 37-3 below. This is the next type of unique formatting in this document. Its characteristics are Times New Roman 12 pt, 0.5" first line indent and automatic paragraph spacing of 12 pts after.

This Nondisclosure and Nonuse Agreement (the "Agreement") is made this \_\_\_ day of \_\_\_\_\_, 2000, by and between Jerry E. Dymond, Jr., and Planners Educational Alliance (the "Company"), and Affinity Consulting Group, LLC, (hereinafter called "Recipient").

WHEREAS, the Company possesses a HotDocs® Estate Planning Template Set (hereinafter called "Confidential Information") which either may be the property of the Company or has been made available to the Company under a separate agreement between the Company and the owner of such proprietary or confidential information relating to a given process; and

FIGURE 37-3

3. **Level 1 of Automatic Paragraph Numbers:** See Figure 37-4 below. This is the first numbered paragraph and the top level of any outline if there are sub-paragraphs numbered below (and there are). Its characteristics are Times New Roman 12 pt, 0.5" first

line indent, and automatic paragraph spacing of 12 pts after. All of that is exactly the same as the un-numbered paragraphs described above. However, there is also Arabic paragraph numbering attached.

1. Confidentiality and Return of Confidential Information. Recipient shall preserve and hold in strict confidence the confidentiality and secrecy of any Confidential Information provided or disclosed by the Company or on behalf of the Company. Except as otherwise authorized in writing by the Company, such Confidential Information shall not be communicated

FIGURE 37-4

4. **Level 2 of Automatic Paragraph Numbers:** See Figure 37-5 below. This is a sub-level of numbered paragraphs below the level 1 described above. Its characteristics are Times New Roman 12 pt, 0.5" left indent, 0.5" first line indent, and automatic paragraph spacing of 12 pts after. There is also lower-case alphabetic paragraph numbering inside parentheses. To make sure you understand how the two indents at play here work, I've labeled them.

2. Confidential Information. The term "Confidential Information" as used herein means information, including but not limited to, trade secrets, formulas, processes, methods, strategies and techniques whether or not marked or specifically identified as confidential contained in the HDT, provided that the foregoing obligations shall not apply to information that is or which hereafter becomes, without a breach of this Agreement or any similar agreement, part of the public domain;

(a) information that at the time of disclosure is or which hereafter becomes, without a breach of this Agreement or any similar agreement, part of the public domain;

Recipient can show through documentary evidence was in Recipient's possession in tangible form at the time of disclosure to Recipient and was not received by Recipient as a result of communication or disclosure in breach of this

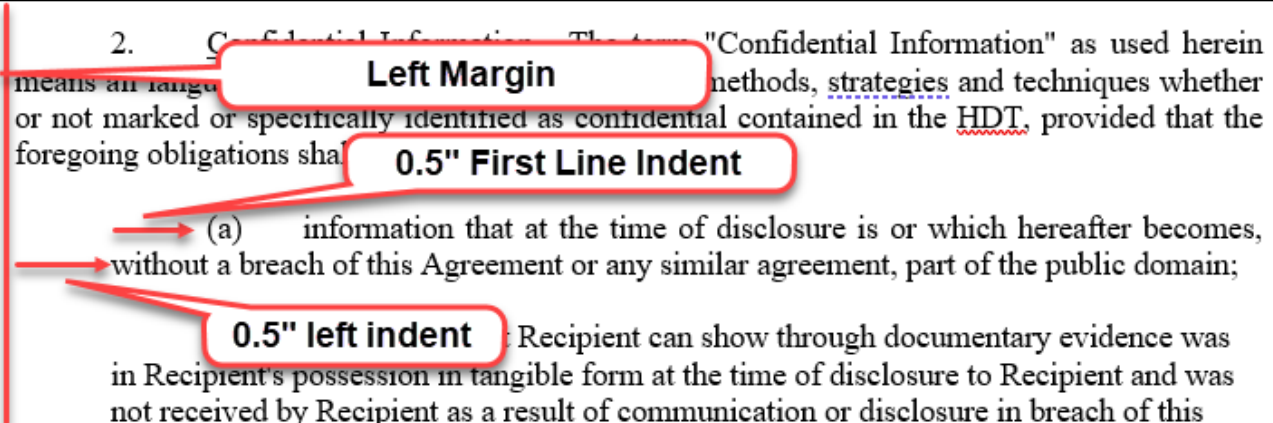


FIGURE 37-5

5. **Un-Numbered Paragraphs With Left and First Line Indents:** See Figure 37-6 below. These are un-numbered paragraphs that appear below the Level 2 numbered paragraphs described previously. Like the Level 2 paragraphs, they are Times New Roman 12 pt, 0.5" left indent, 0.5" first line indent, and automatic paragraph spacing of 12 pts after. The only difference is that unlike the Level 2 paragraphs, these have no paragraph numbers.

Recipient acknowledges and agrees that the Confidential Information not otherwise publicly available constitutes trade secrets and/or confidential business information that is proprietary to the Company. Recipient further acknowledges and agrees that the Confidential Information is confidential and proprietary and has independent economic value, and as such constitutes the confidential property of the Company to the exclusion of Recipient.

3. Non-Use of Confidential Information. Recipient shall not use any Confidential Information for any purpose whatsoever other than for the Permitted Purpose, and shall not




FIGURE 37-6

6. **Signature Lines:** There are signature lines at the bottom of the instrument and also on the Exhibit. There are lines on both sides of the page which should ideally be the same width. Assuming a 0.5" gap between them, each line should be 3" wide so the first line will go from 0" to 3" and the second from 3.5" to 6.5".
7. **Overall Default Formatting For Entire Document:** This document should be Times New Roman, 12 pt., justified alignment, single spaced, with 1" margins.

We'll use the foregoing again in a later step.

## Step Six - Remove Unnecessary Characters/Keystrokes

By characters/keystrokes, I mean unnecessary hard returns, tabs and section breaks. Many broken documents contain these things. You want to let Word indent paragraphs (no tabs) and add spacing between paragraphs (no hard returns used solely for spacing), and I'll determine whether section breaks are required when I'm formatting the document.

### Delete All Sections Breaks

**This step is not necessary if you started with a new document.** Pasting text without formatting will automatically remove all section breaks. If you're working on an existing document, then you should perform this step. Do not just look for section breaks to delete because they're very easy to miss, even with Show/Hide turned on. Let Word look for them and if it doesn't find any to delete, no big deal. Just follow these steps:

1. Go to the top of the document (SK: **Ctrl + Home key**).
2. Open the **Find and Replace dialog**. Click **Home ribbon** → **Editing group** → **Replace button** (SK: **Ctrl + H**). If you see a **More >>** button, click it.
3. Click your cursor into the **Find what box**. Now click the **Special button** at the bottom of the dialog and choose **Section Break** from the menu that appears. This will place **^b** into the Find what box. Leave the **Replace with box** blank.

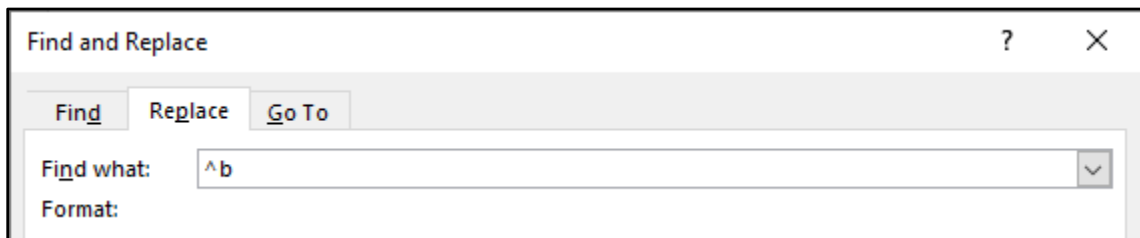


FIGURE 37-7

4. Click the **Replace All button** at the bottom of the dialog. You will now see a dialog explaining how many Section breaks were replaced with nothing (and thereby deleted):

### Remove Tabs

You'll have to execute this step regardless of whether you started over. A **tab** is the space that is created when hitting the Tab key on the keyboard (which is also controlled by tab stops). The space is represented by an arrow character.



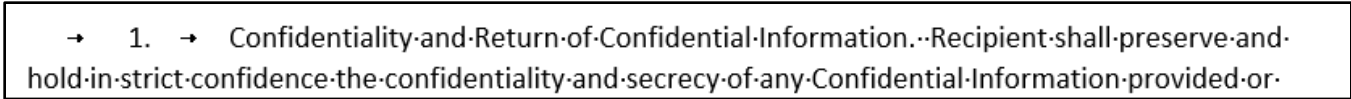


FIGURE 37-8

Your paragraph formatting and styles will eliminate the need for these. Word users who don't understand how Word handles formatting often use tabs in the manner shown above even though they are wholly unnecessary since the same "look" can be achieved using a first line indent.

Rather than manually deleting every tab as you encounter it, it will save time to simply delete them all at once. To do this, follow these steps:

1. Go to the top of the document (SK: **Ctrl + Home key**).
2. Open the **Find and Replace dialog** by hitting **Ctrl + H**, or clicking **Home ribbon → Replace Button** in the **Editing group**. If you see a **More >>** button, click it.
3. Click your cursor into the **Find what box**. Now click the **Special button** at the bottom of the dialog and choose **Tab Character** from the menu that appears. This will place **^t** into the Find what box. Leave the **Replace with box** blank.

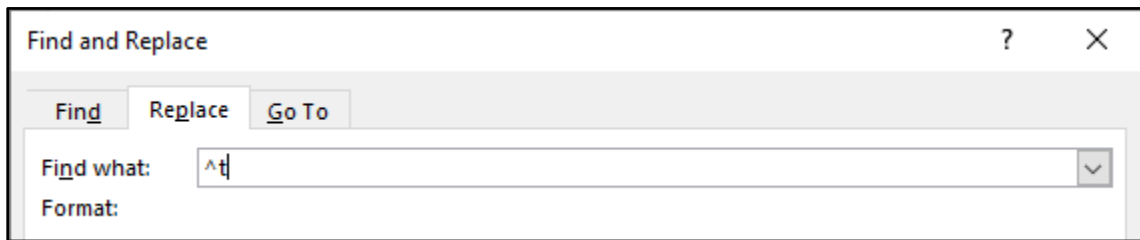


FIGURE 37-9

4. Click the **Replace All button** at the bottom of the dialog. You will now see a dialog explaining how many tabs were replaced with nothing (and thereby deleted).

## Remove Unnecessary Hard Returns

You want to let Word handle spacing between paragraphs and not create vertical spacing by adding extra hard returns between paragraphs. Note, this is only an issue if the original document was formatted with single spaced paragraphs, but there was an extra blank line between each one. Part of our clean-up is to remove those unnecessary hard returns between paragraphs. Follow these steps to remove unnecessary extra hard returns between paragraphs:

1. Go to the top of the document (SK: **Ctrl + Home key**).
2. Open the **Find an Replace dialog**. Click **Home ribbon → Editing group → Replace button** (SK: **Ctrl + H**). If you see a **More >>** button, click it.
3. Click your cursor into the **Find what box**. Now click the **Special button** at the bottom of the dialog and choose **Paragraph Mark** from the menu that appears. This will place **^p** into the **Find what box**. Repeat this so that the **Find what box** has **^p^p** in it (we're telling Word to search for two paragraph marks in a row).
4. In the **Replace with box**, add **one Paragraph Mark** so your screen looks like Figure 37-10.

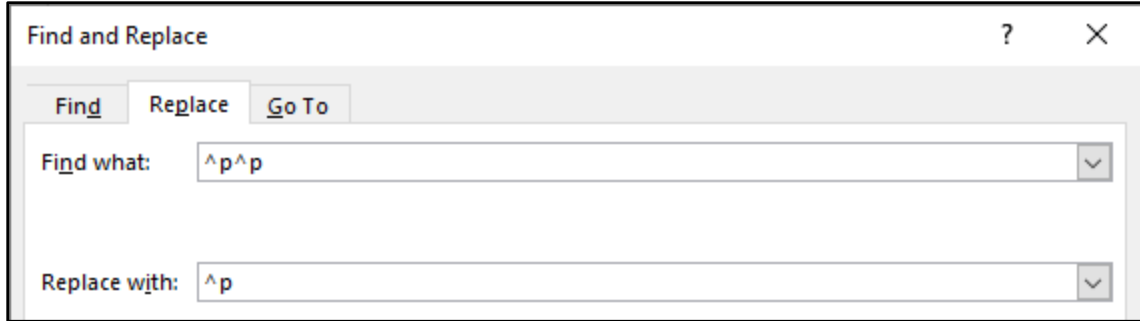


FIGURE 37-10

5. Click the **Replace All** button at the bottom of the dialog. This should get rid of most or all of the extra hard returns. It would be worth clicking Replace All a few more times as there may have been places in the document where there were three or more hard returns in a row. Keep clicking until you get zero replacements.

## Step Seven - Wipe Out All Font and Paragraph Formatting

**This step is not necessary if you started with a new document.** In any event, this is easily done by following these steps:

1. Select the entire document (SK: **Ctrl + A**).
2. Click the **Home ribbon** → click the **Clear Formatting** button in the **Font group**.

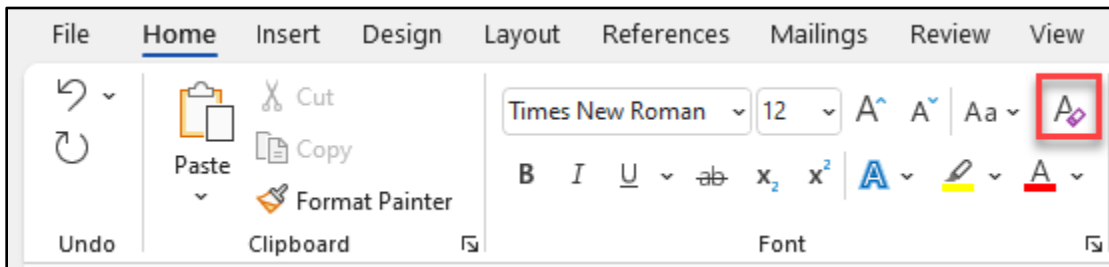


FIGURE 37-11

At this point, your text should be pretty clean!

## Step Eight - Set Default Font and Paragraph Settings

Remember from the Styles chapters (Chapters 22 - 28) of this manual that the Normal style is your default style for your document and if its default font is different than what you're using in your document, you'll have problems with random font switching. For more information on this issue, see page 216 above.

To make sure your default formatting is correct, refer back to your original notes in Step Three above and note what you wrote down for the default font and paragraph formatting. Now, follow these steps:

1. Open the **Styles pane** in Word by hitting **Ctrl + Alt + Shift + S**, OR by clicking **Home Ribbon** → **Styles launcher** (see Figure 37-12).

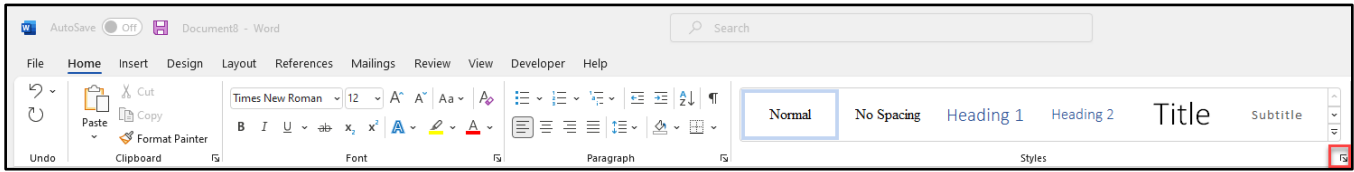


FIGURE 37-12

2. Locate the **Normal style** in the **Styles pane**, right-click it → choose **Modify...**
3. Click the **Format button** in the bottom, left corner of the dialog and choose **Font**. Change the default font to what you would like it to be for the document. If you're using the downloaded sample file, then set it to Times New Roman, 12 point. Click **OK**.
4. Click the **Format button** again and choose **Paragraph**. On the Indents and Spacing tab, make sure that the indents are set to 0" and there is Opt of spacing before and after. Set the alignment to justified and the line spacing to single.

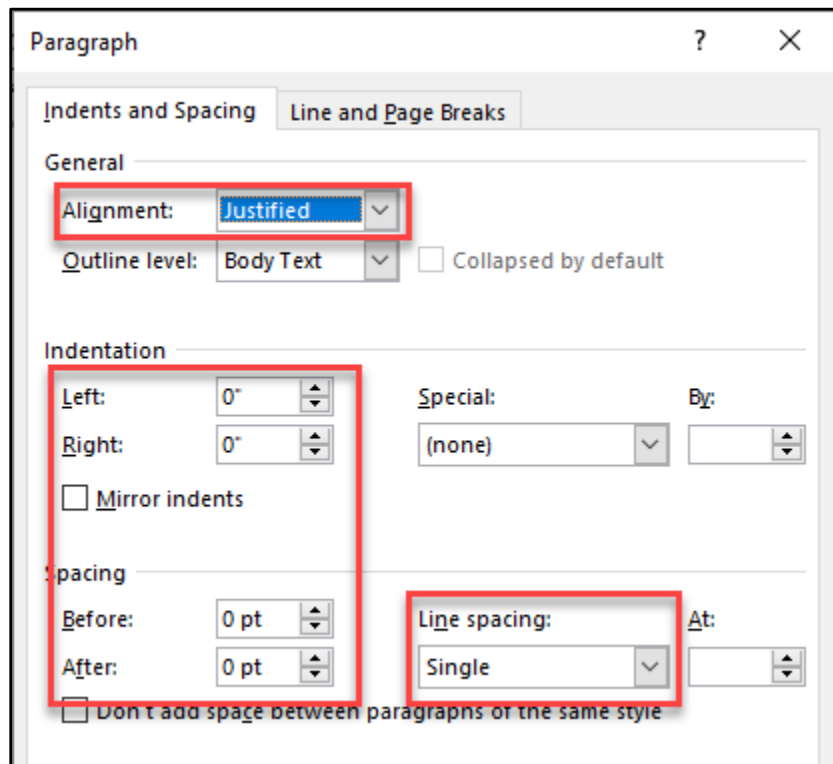


FIGURE 37-13

5. On the line and page breaks tab, make sure that only the box for **Widow/Orphan control** is checked. After you're done, click **OK**, then **OK**.

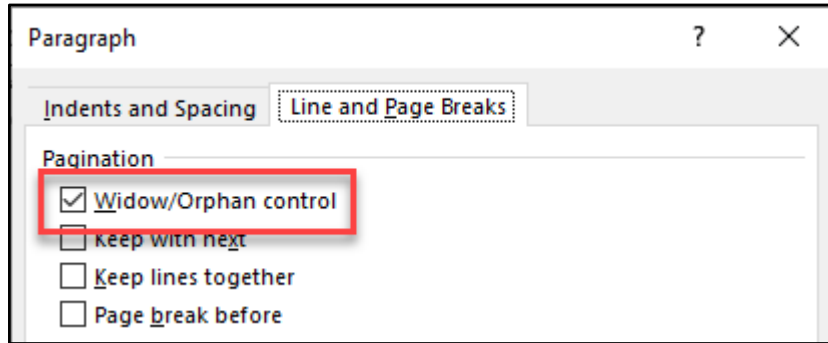



FIGURE 37-14

6. There is *another* place to set your default formatting and if you don't set this in both places, your document may revert to something else. To set this, click the Manage Styles button at the bottom of the Styles pane - . Now click the **Set Defaults** tab at the top and make all of the same font and paragraph changes described above (see Figure 37-15). When you're done, click OK at the bottom of the dialog.

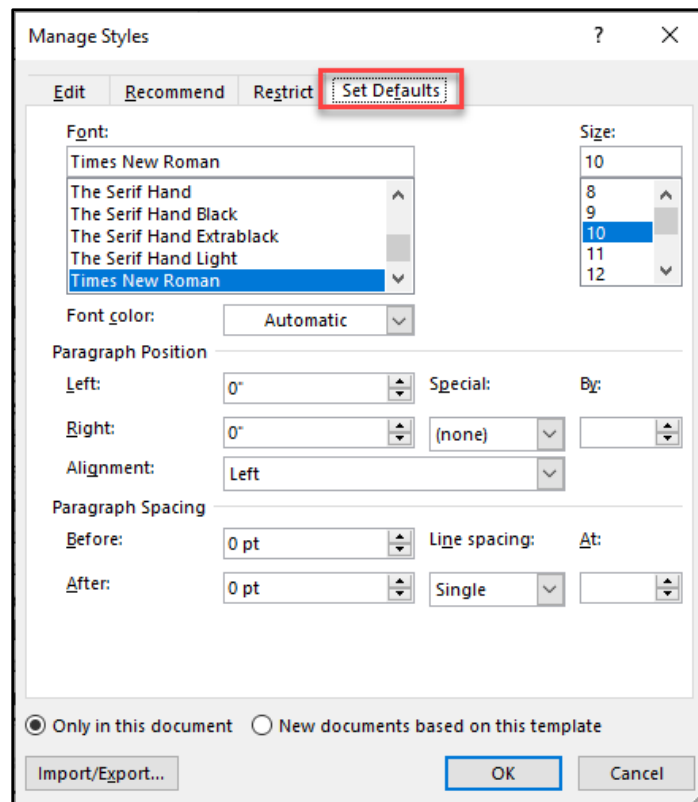


FIGURE 37-15

## Step Nine - Set Margins and Other Section Settings

Now that you've got the document down to a single section (which you did by deleting all section breaks in Step Six above), it's easy to fix the page settings such as margins and the like. If you started with a blank new document, then there's probably not much to do here. However, it's still

a good idea to check all of the settings and make sure you didn't miss anything. To open the appropriate dialog, click the **Layout ribbon** → **Page Setup launcher** (see Figure 37-16).

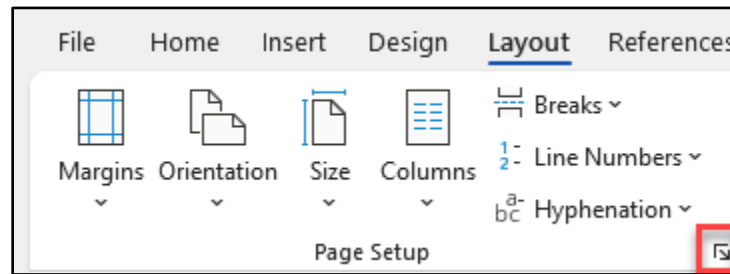


FIGURE 37-16

- **Margins Tab:** First, click the **Margins tab** of the **Page Setup dialog** and make sure your margins are correct (most likely, they should be 1" for all settings).
- **Paper Tab:** Second, click the **Paper tab** of the **Page Setup dialog** and make sure you have the correct paper size selected. If some of the pages of your document do not need to be the same as all of the rest, you can make that change after we re-divide the document with section breaks.
- **Layout Tab:** Third, click the **Layout tab** of the **Page Setup dialog**. Common problems include the following:
  - **Different first page** should be checked if you do not intend to number the first page of your whole document or of any particular section.
  - **From Edge: Header & Footer settings** should almost always be 0.5" although these often get set to 1" or something larger than 0.5". The problem this creates is that most documents have 1" top and bottom margins. If that is the case and your **From Edge settings** are also 1", then text in your header or footer and text in the body of are document are all 1" from the edge of the page. Since Word won't let the text of your document and the text in a header or footer overlap one another, it will move the text so that they don't overlap. For example, if I had my page number 1" from the edge of the page and also had a 1" bottom margin, then Word would automatically move up the text at the bottom of each page so that it doesn't overlap the page numbering. The net effect of this is that the page number appears too high in the bottom margin and I'm not really getting a 1" bottom margin because the text has been moved up.
  - **Vertical Alignment:** Another setting I often see messed up is the **Vertical alignment**. Unless you're working on a cover page and truly want the text centered vertically, this should always be set to **Top**.

## Add Back In Section Breaks You Need

If you're working on the downloaded file described previously, then we definitely want a section break before Exhibit A because we are not going to page number the exhibit. To do this, put your cursor to the left of Exhibit A in the document and click the **Breaks** button on the **Layout ribbon** → **Section Breaks: Next Page**.

## Step Ten - Add Page Numbering

If you started with a new document, then there's probably no page numbering in your new document yet. If you tried to fix a document by editing the original, you may or may not have page numbering. To add page numbering to the bottom of each page, click the **Insert ribbon** → **Footer button** in the Header & Footer group → **Edit Footer**. Now that you're in the footer, you're going to see the Header & Footer ribbon appear on the right side of the screen. Click the **Page Number** button on the Header & Footer ribbon → **Current Position** → **Plain Number**. That will drop an Arabic page number where your cursor was. If you want to center the page number, just hit **Ctrl+E**.

## Step Eleven - Delete Any Tables of Contents or Tables of Authority

If the document you're working with had a table of contents, table of authorities or index, delete them now. We'll rebuild those tables using the tools in Word.

## Step Twelve - Clean Up the Styles Pane

You might want to re-read the chapters on Styles (Chapters 22 - 28) which begin on page 199. In order to properly format our new document, we need to use a different style for each type of unique formatting required in the document. As you recall, in Step Five - Take Notes About The Formatting You Want To Replicate, we already identified the various types of unique formatting in our subject document. Anyway, by default, Word has 247 styles, but the average legal document only requires 6 to 10 styles to handle all of the formatting. There's no point in seeing 247 styles when you're only going to use 8 or so.

In order to clean up the styles pane, we'll need to make some decisions about which styles to use for what formatting.

### Rules for Styles

- Use Word's Existing Styles and Modify Them to Do What You Want:** For example, Word automatically applies a style called Footnote Text to all footnotes in every document. If you don't like the way your footnotes are formatted, you have three choices: 1) modify the Footnote Text style so it formats the footnotes the way you want automatically; 2) select each footnote after it's entered and manually change its formatting; or 3) create a custom footnote style and apply it to every footnote after each one is inserted. To the extent it's not obvious, options 2 and 3 are going to force you to waste a lot more time than option 1. More importantly, option 1 is the proper way to handle such issues.
- If You Have Numbered Paragraphs, Use the Heading Styles:** Based on their names, you would think that these styles should only be used for titles, but that's not true. Word wants you to use the built-in Heading styles (there is Heading 1, Heading 2, Heading 3 - through Heading 9) and you will benefit from other enhanced functionality if you do that. The Heading styles do *not* have paragraph numbering applied to them by default, so we'll have to do that (this is explained a bit later in this chapter). If you look back at items 3 and 4 under Step Five - Take Notes About the Formatting You Want to Replicate, the formatting for level 1 of the outline should be handled by the

style **Heading 1**; the formatting for level 2 of the outline should be handled by the style **Heading 2**, etc. This is discussed in depth under Use System Styles Whenever Possible on page 204 above.

- **Use The Body Text Styles for Unnumbered Paragraphs:** There are multiple built-in Body Text styles that you can use for this. There are built in styles called Body Text, Body Text 2, Body Text 3, Body Text First Indent, Body Text First Indent 2, Body Text Indent, Body Text Indent 2 and Body Text Indent 3. Look again at items 2 and 5 under Step Five - Take Notes About the Formatting You Want to Replicate. We'll use **Body Text** for item 2 formatting and **Body Text 2** for item 5 formatting.
- **Use The Built In Title Style for Titles:** I realize that seems rather obvious, but I just wanted to make sure you knew there *is* a Title style in every document. See item 1 under Step Five - Take Notes About the Formatting You Want to Replicate. The title on page 1 and the Exhibit should be handled by the **Title** style built into Word.

So that this makes a little more sense, see Figure 37-17 below which shows you which style is applied to each paragraph.

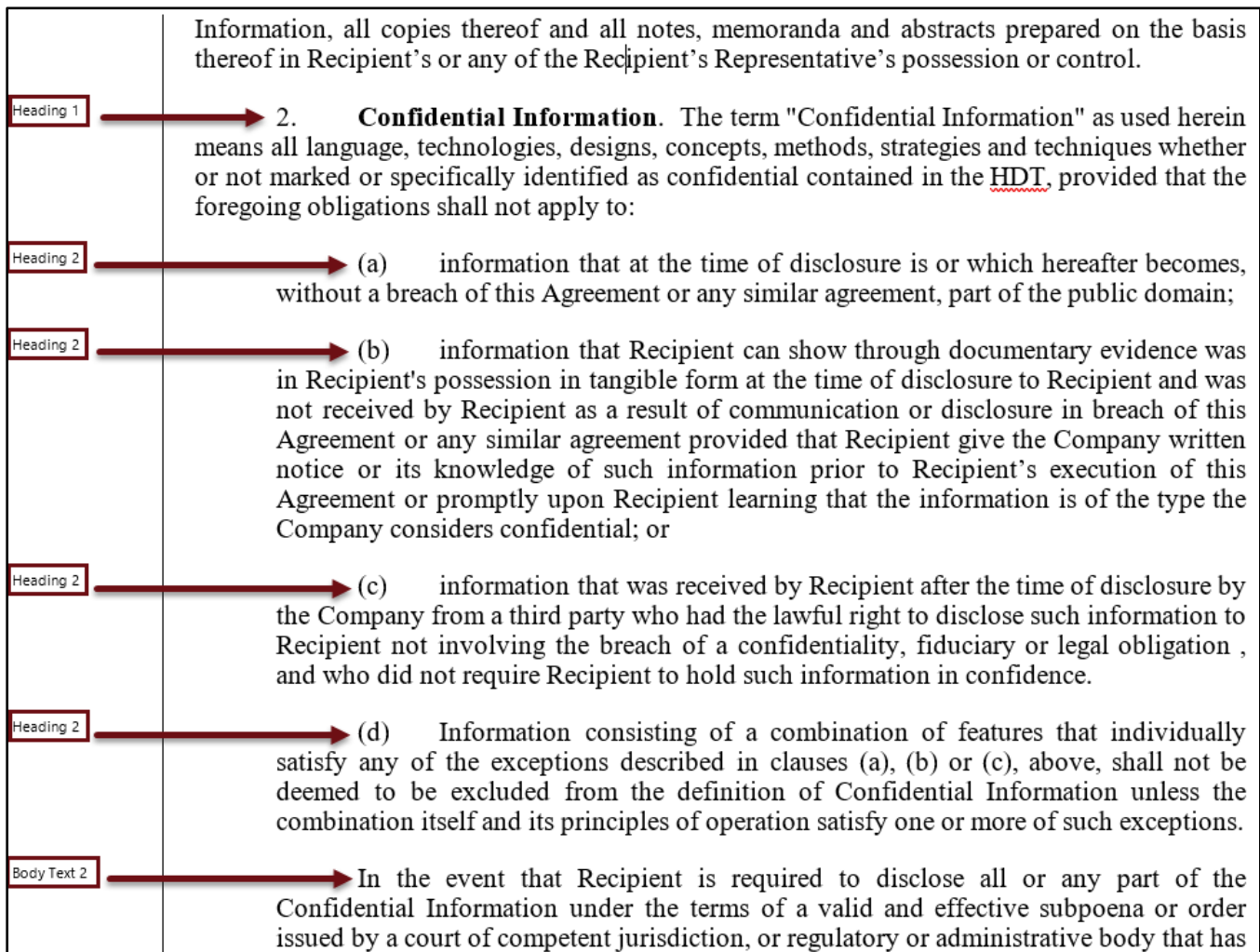


FIGURE 37-17

- **Signature Lines:** I normally wouldn't create or customize a separate style for signature blocks unless there are a lot of them in a document. In the case of the downloaded

document you're working with, I would just leave that the Normal style and manually format it the way I want it to look.

## Reveal the Styles You Need, and Hide the Styles You Don't Need

Before you get started, you need to clean up your styles pane in the document you're editing so that the only styles you see are the ones you need to format the document. Go back to the notes you wrote down on Step Five - Take Notes About the Formatting You Want to Replicate above and follow these steps:

Open the Styles pane by clicking **Home ribbon** → **Styles launcher** (SK: **Ctrl + Shift + Alt + S**).

1. Click the **Options link/button** at the bottom, right corner and set **Select styles to show** to **Recommended**; set **Select how list is sorted** to **Alphabetical** and clear all of the checkboxes in the dialog.

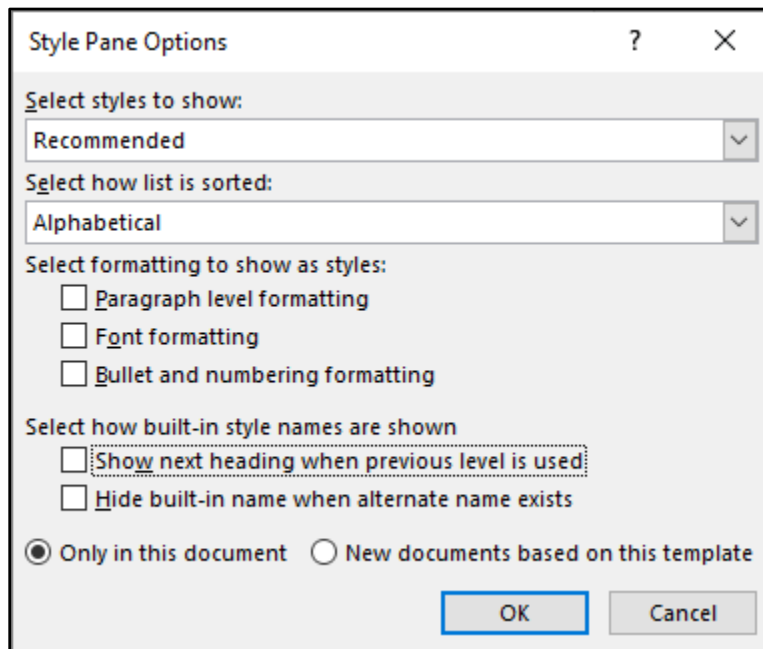



FIGURE 37-18

2. Next, click the **Manage Styles button** at the bottom of the **Styles Pane** .
3. Click the **Recommend tab** at the top of the subsequent dialog. This is where we control what styles will show up under the Recommended set we just asked for in item 1 above.
4. Click the **Select All button** → **Assign value button** → make sure the value is 1 and click **OK**. This sets all of the "assigned values" that you can control to 1 so that they'll sort alphabetically and not according to the value. If you don't do this, then later when you're picking styles from lists, they will show up as sorted by value and then alphabetically (which makes it hard to find what you're looking for since the assigned values are rather random).
5. It's easier to hide every style currently included in the "Recommended" set and cherry-pick the ones you want to see. Therefore, make sure all of the styles are still selected from the previous step (if not, click the **Select All button** again) and click the **Hide button**.



6. Now select each individual style that you need according to your previous evaluation of the document and click the **Show button**.
7. After all of the styles you need to show are designated as such, click the **OK button**.

The styles probably won't look the way you want at this point, but at least you've got the relevant formatting tools visible and now you can customize the formatting they apply as your document requires. At this point, the styles pane in the document I'm rebuilding looks like the following.

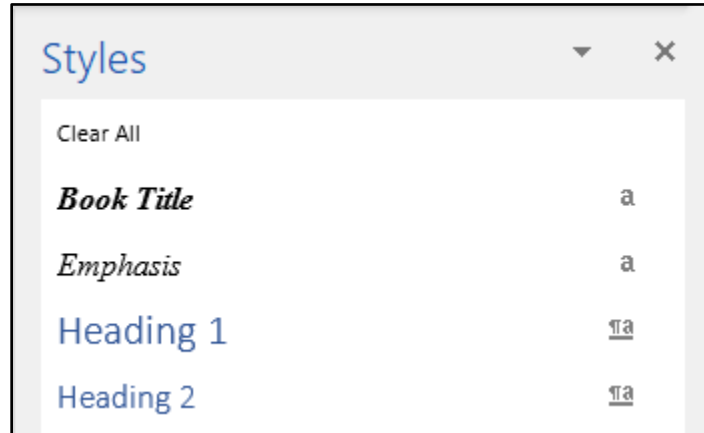


FIGURE 37-19

## Step Thirteen - Customize and Apply Styles

Now that you've got the styles you need visible in the styles pane, you can start customizing them to work with your document. We'll start at the top of the Nondisclosure Agreement and work our way down the document.

### Set and Apply the Title Style

This is the first line of text in the Nondisclosure Agreement document we're working with. Refer back to the notes we made about how we want the text to look here in Step Five - Take Notes About The Formatting You Want To Replicate. Right-click and modify the Title style in your Styles pane. In the first dialog, make the **Style for the following paragraph** Body Text. Style for the following paragraph is what the user will get when they hit Enter at the end of a paragraph to which the Title style is applied. There's no rule here as to what the style for the following paragraph should be - you have to look at the document to determine what is appropriate. Everywhere in *this* document, the Title style is followed by the formatting we're going to use Body Text for.

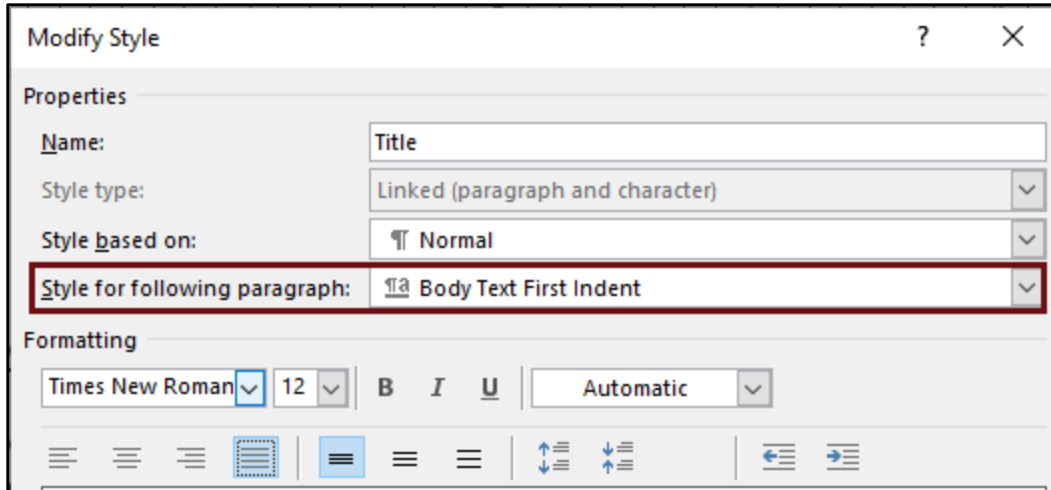


FIGURE 37-20

Now click the **Format** button at the bottom of the **Modify Style dialog** and choose **Font**. Make sure your font is **bold**, the point size is **12**, you have **underline** turned on, and you checked **All caps**. Click **OK** when you're done.

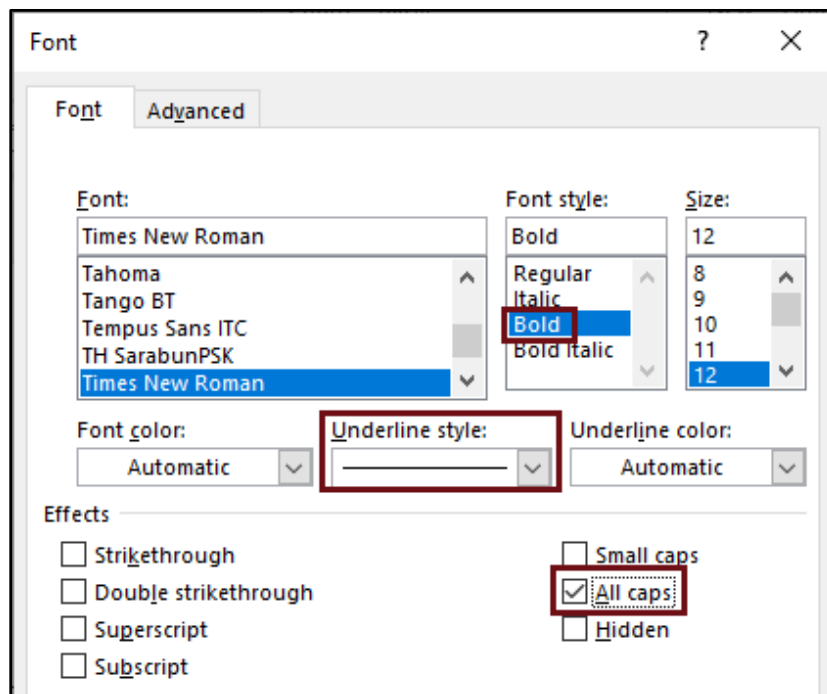


FIGURE 37-21

Now click the **Format** button again → **Paragraph** → **Indents and Spacing** tab. Don't click the OK button yet because we're not done with the Paragraph formatting.

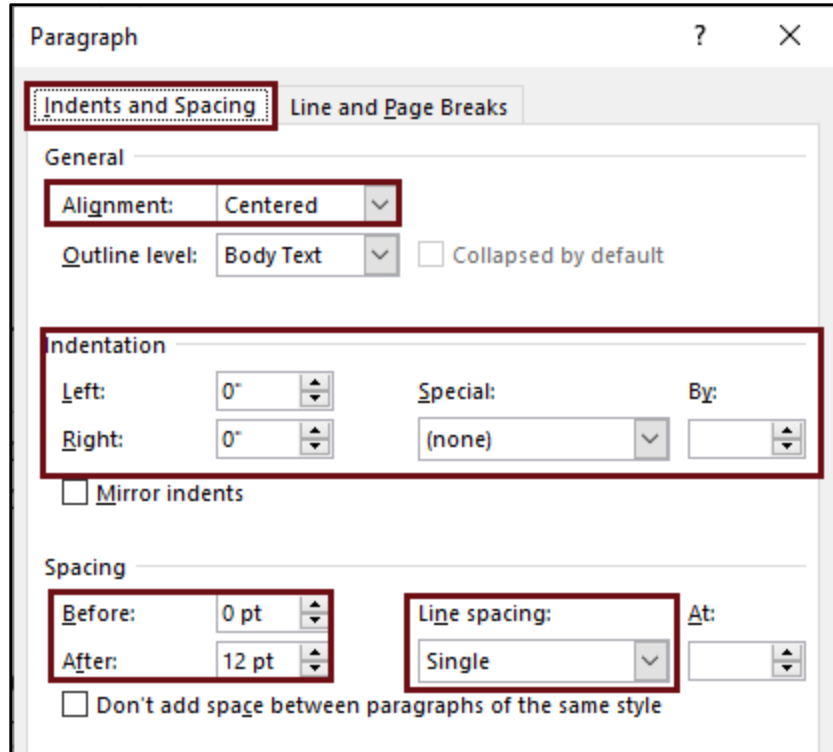


FIGURE 37-22

Now click the Indents and Spacing tab at the top. We want to add paragraph glue to the title so check **Keep with next** and **Keep lines together**. This will ensure that we never get an inappropriate page break after a title. Now click the OK button → OK again and the Title style is ready to apply.

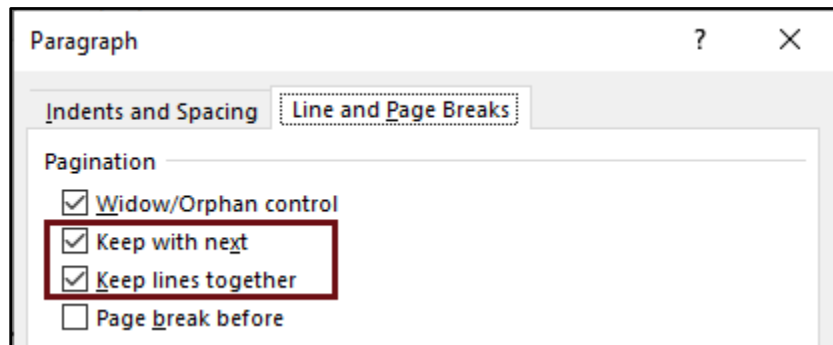


FIGURE 37-23

To apply your now customized style, just click your cursor into the title (don't select any text) on page 1 of the Nondisclosure Agreement and left click the Title style in the Styles pane. If you select anything less than the entire paragraph before you apply the style, the style will only apply to what you selected and we want this to apply to the whole paragraph.

## Set and Apply the Body Text Style

The next 4 paragraphs in our sample document need to be formatted with a 0.5" first line indent and a 12 pt after each paragraph. Right-click and modify Body Text. In the next dialog, click the **Format button** → **Font**. Make sure it's Times New Roman 12 pt, single spaced. If not, make any necessary adjustments and click the OK button at the bottom of the dialog. Now click the **Format**

**button** again → **Paragraph**. Make sure you have 12 pt after and a first line indent of 0.5". Now click **OK** → **OK** and Body Text is ready to apply to the first 4 paragraphs.

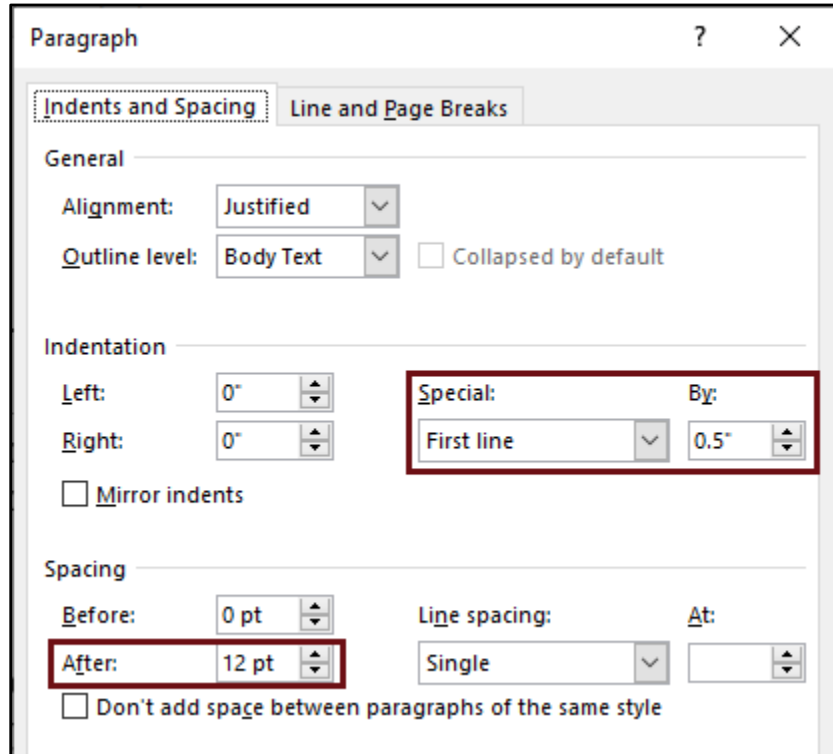


FIGURE 37-24

## Clean Up the Heading Styles

By default, Word has some strange ideas about how Heading 1 and Heading 2 should be formatted. If you haven't made any changes to Word's defaults in this regard, then both styles are likely to be blue, large, and the Calibri Light font. So before we can use them, we need to get them to Times New Roman, 12 pt, and black.

If you're wondering about the automatic paragraph numbers, we'll apply them after we get the Heading styles at least looking the way they need to look without the paragraph numbers. This is definitely a two-step process (fix the styles and then apply the paragraph numbers).

Right-click and modify **Heading 1** in your Styles pane.

- In the Modify Style dialog, change the **Style for the following paragraph** to Heading 1 because if someone is modifying this document and they're at the end of a numbered paragraph, they're expecting another numbered paragraph when they hit Enter.

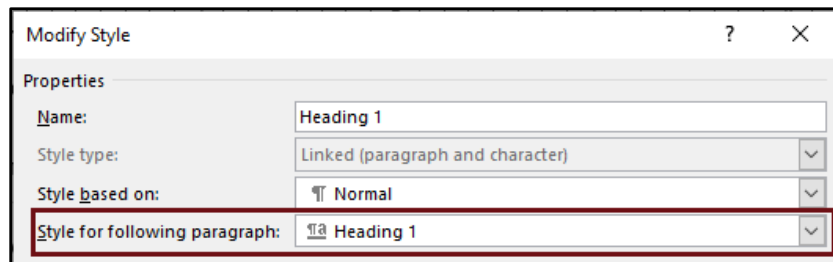



FIGURE 37-25

- Now click the **Format button** → **Font**. Make the font Times New Roman, regular, 12 pt, and font color black → click the **OK button**.
- Click the **Format button** gain → **Paragraph**. On the **Indents and Spacing** tab, make sure you have justified alignment, 12 pt after and 0 pt before, single line spacing, and no indents. Our indents will be taken care of by the numbering scheme we build and connect to the Heading styles. Stay in the same dialog and now click the **Line and Page Breaks** tab at the top. You want Widow Orphan Control turned on but you definitely don't want the paragraph glue turned on (keep with next & keep lines together) or you'll end up with all of your numbered paragraphs sticking to each other and your page breaks will be all messed up. Now click **OK** → **OK**.

Now right-click and modify **Heading 2** in your Styles pane. Repeat everything we did to Heading 1 except that the **Style for the following paragraph** will be **Heading 2** instead of Heading 1. Everything else is the same.

## Build An Auto Paragraph Number Scheme for The Heading Styles

This is the fun part (kidding - it's not fun). For context, we're going to build a new List Style which will contain up to 9 levels of automatic paragraph numbers. Then we're going to connect the first two levels of those numbers to Headings 1 and 2. Here we go:

1. Click the **Multilevel List button** in the **Paragraph Group** of the **Home ribbon** -  → go all the way down the drop-down and choose **Define New List Style**. In the next dialog, the only thing you need to do is name the List Style and we recommend that you always call this Numbering since that's what it will hold. Once you've named it, click the **Format button** at the bottom of the dialog → choose **Numbering**. See Figure 37-26 below for an illustration.

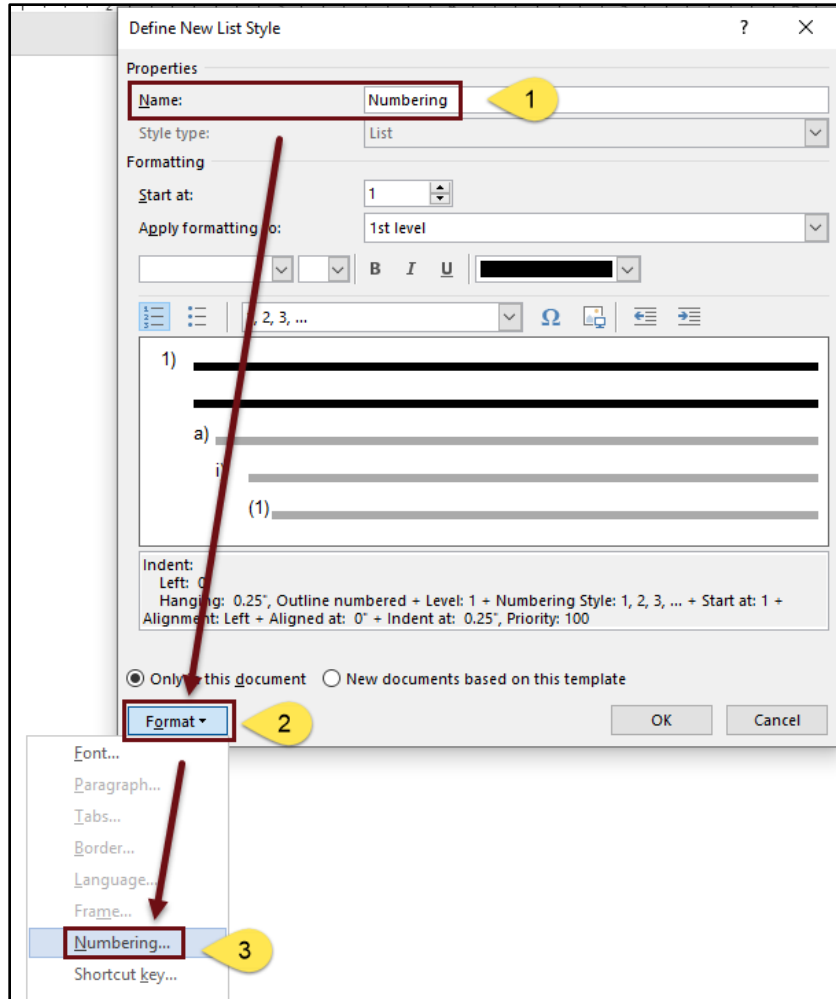


FIGURE 37-26

2. Once in the Modify Multilevel list dialog, first click the MORE button. Then click on **Level 1** in the top, left corner, then choose **Heading 1** from the dropdown under **Link level to style**. **Don't click OK yet.**

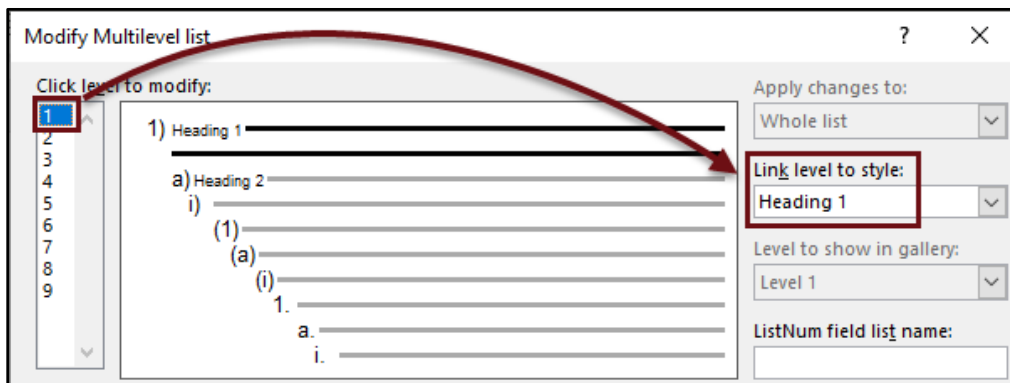


FIGURE 37-27

3. Now click on **Level 2** on the top, left corner and under **Link level to style**, choose **Heading 2**.

**Set up the numbering for Level 1:**

- After you've completed the previous step, click on **Level 1** again so we can set up its formatting. The foregoing two steps connected the paragraph numbers and levels to the appropriate Heading styles and that is the magic sauce that makes all of this work. Once those connections are made, they're nearly impossible to break. Now we're ready to format the Level 1 of our paragraph numbers. Refer to Figure 37-28 below.

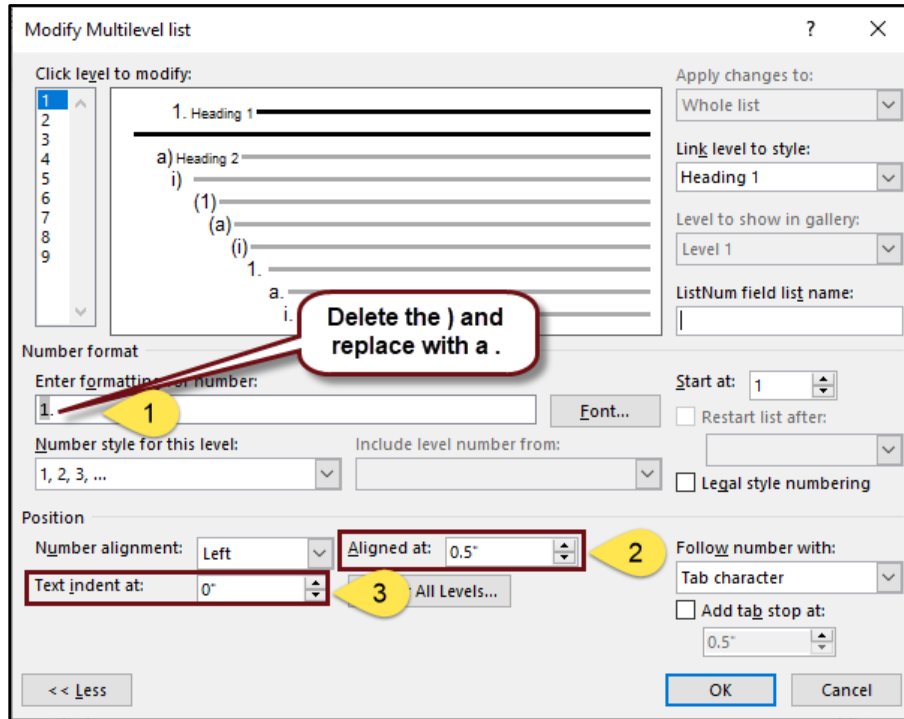


FIGURE 37-28

- Enter Formatting For Number:** First, delete the parenthesis to the right of the paragraph number in the **Enter formatting for number** box and replace it with a period. Note that if you wanted to change the paragraph number to a roman numeral or something other than an Arabic 1., you simply choose a new number format from the drop down under **Number style for this level** which is immediately below the box where the number appears. Whatever you choose will automatically replace the 1. that was there previously. It's important to note that you should *never* type the paragraph number in the **Enter formatting for number** box or every paragraph will be that same number (it won't count).
- Font Button:** You would only need to click the Font button if you wanted the font formatting for the paragraph number alone to be different than the font formatting of the rest of the paragraph that follows the number. That is almost never the case unless you wanted the number to be bold even though the rest of the paragraph was *not* bold. So in 99.9% of the cases, you won't need to click the Font button at all.

- **Number Alignment:** Number alignment controls how the paragraph numbers line up. To understand how it works, see below and notice how the redline lines up with the decimal points after each number.

Left	Right	Center
1. Sample sentence for demonstration purposes.	1. Sample sentence for demonstration purposes.	1. Sample sentence for demonstration purposes.
2. Sample sentence for demonstration purposes.	2. Sample sentence for demonstration purposes.	2. Sample sentence for demonstration purposes.
3. Sample sentence for demonstration purposes.	3. Sample sentence for demonstration purposes.	3. Sample sentence for demonstration purposes.
4. Sample sentence for demonstration purposes.	4. Sample sentence for demonstration purposes.	4. Sample sentence for demonstration purposes.
5. Sample sentence for demonstration purposes.	5. Sample sentence for demonstration purposes.	5. Sample sentence for demonstration purposes.
6. Sample sentence for demonstration purposes.	6. Sample sentence for demonstration purposes.	6. Sample sentence for demonstration purposes.
7. Sample sentence for demonstration purposes.	7. Sample sentence for demonstration purposes.	7. Sample sentence for demonstration purposes.
8. Sample sentence for demonstration purposes.	8. Sample sentence for demonstration purposes.	8. Sample sentence for demonstration purposes.
9. Sample sentence for demonstration purposes.	9. Sample sentence for demonstration purposes.	9. Sample sentence for demonstration purposes.
10. Sample sentence for demonstration purposes.	10. Sample sentence for demonstration purposes.	10. Sample sentence for demonstration purposes.
11. Sample sentence for demonstration purposes.	11. Sample sentence for demonstration purposes.	11. Sample sentence for demonstration purposes.
12. Sample sentence for demonstration purposes.	12. Sample sentence for demonstration purposes.	12. Sample sentence for demonstration purposes.
13. Sample sentence for demonstration purposes.	13. Sample sentence for demonstration purposes.	13. Sample sentence for demonstration purposes.

FIGURE 37-29

In most cases, you'll want to set it at Left and that's its default position.

- **Aligned At:** This measurement is how far away from the left margin you want the paragraph number to be on the first line of the paragraph. For level 1 of our outline, we want this to be set at 0.5".

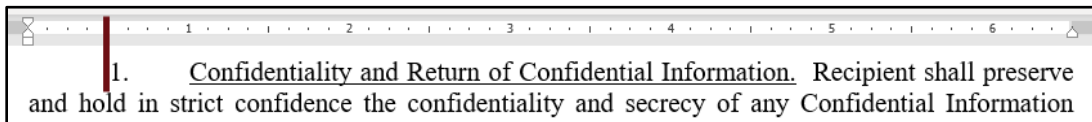


FIGURE 37-30

- **Text Indent At:** This is how far from the left margin you want the second and subsequent lines of the paragraph to be. As you can see from Figure 37-30 above, the second line comes all the way back to the left margin, so the measurement should be 0.0".



That's it for **Level 1**, now we're ready to set up **Level 2**. So click on the 2 in the top, left corner of the dialog and here are your settings.

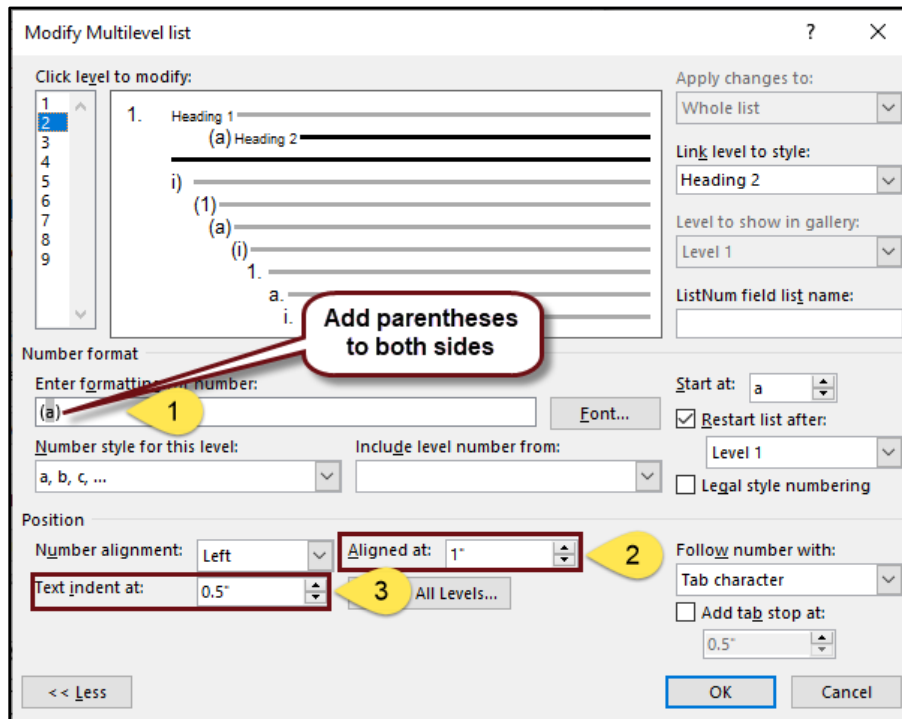


FIGURE 37-31

- **Enter Formatting For Number:** If you need to change the numbering to lower case alpha, click the drop down under **Number style for this level** which is immediately below the box where the number appears and choose what you need. Now make sure there are parentheses on both sides of the letter.
- **Font Button:** No changes here so don't bother clicking it.
- **Number Alignment:** Leave this at Left.
- **Aligned At:** This measurement is how far away from the left margin you want the paragraph number to be on the first line of the paragraph. For level 2 of our outline, we want this to be set at 1.0".

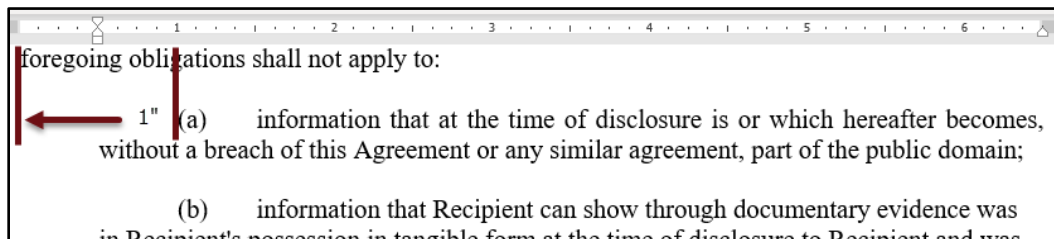


FIGURE 37-32

- **Text Indent At:** This is how far from the left margin you want the second and subsequent lines of the paragraph to be. As you can see from Figure 37-32 above, the second line comes 0.5" from the left margin, so the measurement should be 0.5".
- Now click the OK button at the bottom and you should see paragraph numbers attach to your Heading styles.

## Apply The Heading Styles

The paragraph numbers from the original document are still in the new document. So the first thing to do is to delete them.

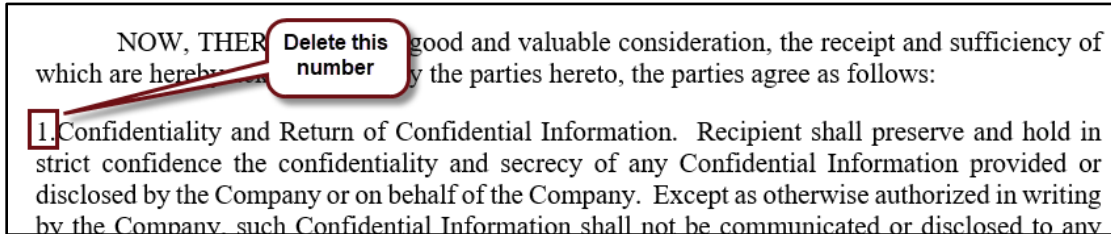


FIGURE 37-33

Now click in the paragraph after you've deleted the number and left click **Heading 1** from the Styles pane. This should automatically apply the paragraph number, the paragraph spacing and the first line indent. Continue doing this through paragraph 2. When you encounter the subparagraphs for 2(a), etc., apply **Heading 2** instead of **Heading 1**. Leave the two paragraphs following 2(d) and continue formatting paragraphs 3 - 5.

## Set and Apply the Body Text 2 Style

After paragraph 2(d), you have two paragraphs that need to be set up with a 0.5" left indent, a 0.5" first line indent, and a 12 pt after. Right-click **Body Text 2** in the Styles pane and modify it. Click Format → Paragraph and make sure all of the following settings are correct:

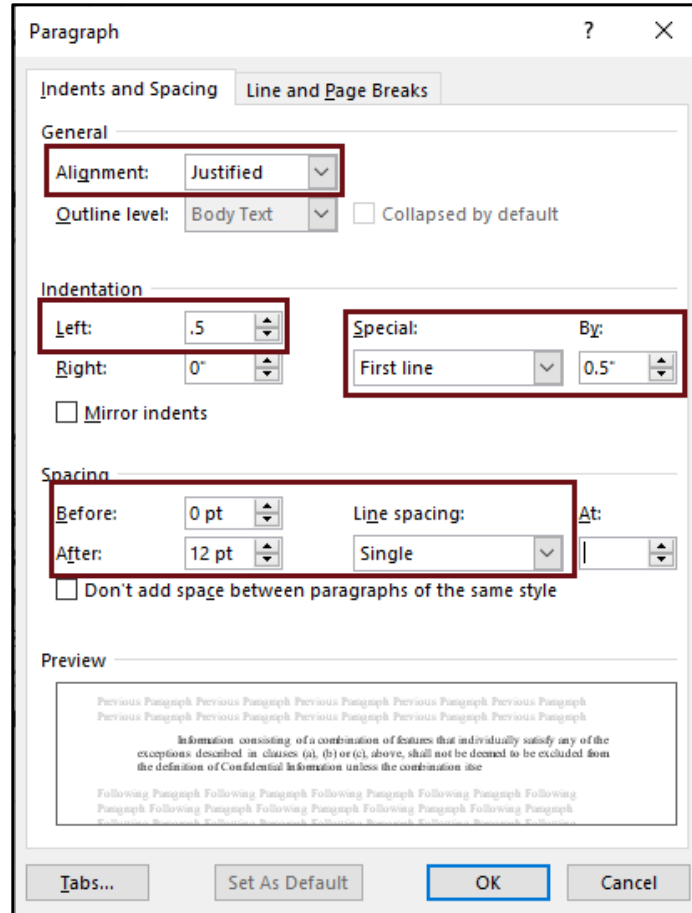


FIGURE 37-34

Click the **OK** button and apply **Body Text 2** to the next 2 paragraphs by selecting the entirety of both paragraphs and clicking **Body Text 2** in the Styles pane.

## Finish Final Formatting

To complete this document, take the following steps.

- Apply Body Text to the paragraph above the signature lines that begins INTENDING TO BE LEGALLY BOUND...
- Put your cursor in the next paragraph that begins "Planners Education Alliance..." Put your cursor after the Inc. in that line and hit a tab key. Now manually add a left tab stop at 3.5" on the ruler so Affinity Consulting Group, LLC lines up appropriately. It should look like this now:

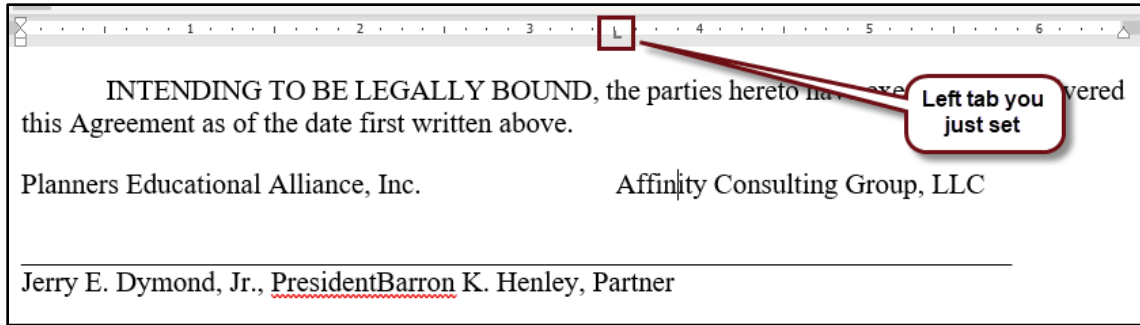


FIGURE 37-35

- Delete the long signature line above the signatory names. With your cursor on the now blank line, right-click the blank line → Paragraph → click the Tabs button. Once the Tabs dialog is open, set left tabs at 3", 3.5" and 6.5".

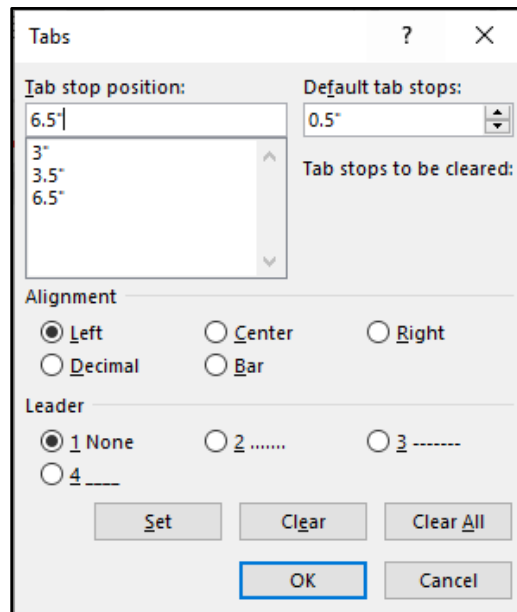


FIGURE 37-36

- With your cursor on the same line, click the **Underline** button on the **Home ribbon**, and click the Tab key. Click the **Underline** button again to turn it off and hit another Tab key. Turn on **Underline** again and hit another Tab key. You should have perfect lines now that look like this:

- 
- On the next line, put your cursor between President and Barron and hit a Tab key. Now add a manual left tab at 3.5" on the rule and the name should line up and the whole thing should look like this:

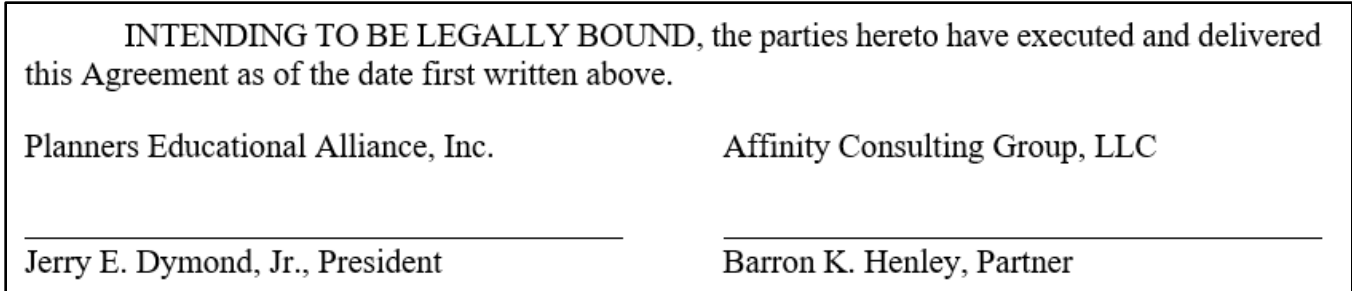


FIGURE 37-37

- On the next page, apply the Title style to EXHIBIT A and Body Text to the paragraph below EXHIBIT A.
- Copy the signature lines from the preceding page and paste them on top of the lines on Exhibit A. Add a Tab key before the word Signature on each line and then put a manual 3.5" left tab on the ruler.
- Select the Titles for paragraphs 1 - 5 and make them underlined.
- Now click the View ribbon and check Navigation Pane and you'll see an outline of the document that you can click on (this is here because we used the Heading styles to handle the paragraphs with numbers).

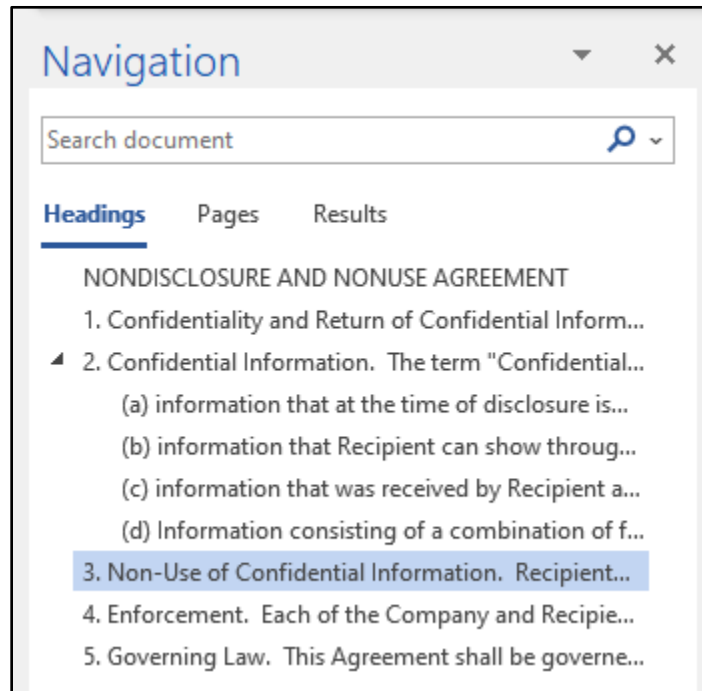


FIGURE 37-38

## Step Fourteen - Add Back Any Footnotes

If your original document had any footnotes, the process of pasting its text into a new document without formatting will omit the footnotes. Therefore, you need to reinsert them into the new document you've created (and they can only be inserted one-at-a-time). The best process to follow is:

1. Select and copy the text of the first footnote from the old/original document;
2. Create a new footnote in your new document (**References** ribbon ➔ **Insert Footnote** button);
3. When your cursor appears in the footnote at the bottom of the page, click the bottom of the **Paste** button on the Home ribbon and choose **Keep Text Only**. You may have to add any italics, bold or other formatting to the footnote that may have been present in the original.
4. If you don't like the way the footnotes are formatted in your new document, then you need to modify the Footnote Text style (which controls their formatting). To locate the Footnote Text style and edit it, open your styles pane (**Ctrl + Shift + Alt + S**) ➔ click the **Options button/link** at the bottom of the styles pane ➔ under **Select styles to show**, choose **All styles** ➔ click **OK**. Now you'll see all of the available styles in your styles pane. Scroll down until you see **Footnote Text**, right-click and modify it as you wish.
5. Repeat the previous 3 steps for each footnote in the original document.

## Step Fifteen - Add Paragraph Cross References

If your original document contained paragraph cross references, now is the time to insert them so that they'll automatically update if numbered paragraphs are added or deleted later. You can insert automatically updating cross references by clicking on the **Insert ribbon ➔ Links group ➔ Cross-reference button**. For a full explanation of this, see Chapter 30 on page 242.

For our sample document, see paragraph 2(d). It contains 3 references to the preceding paragraphs. Select the (a) in paragraph 2(d) ➔ click the **Insert ribbon ➔ Cross-reference button** ➔ change **Insert reference to** so it is **Paragraph number (no context)** ➔ click on paragraph 2(a) in the list captioned **For which numbered item:** ➔ **Insert** button ➔ **Close** button.

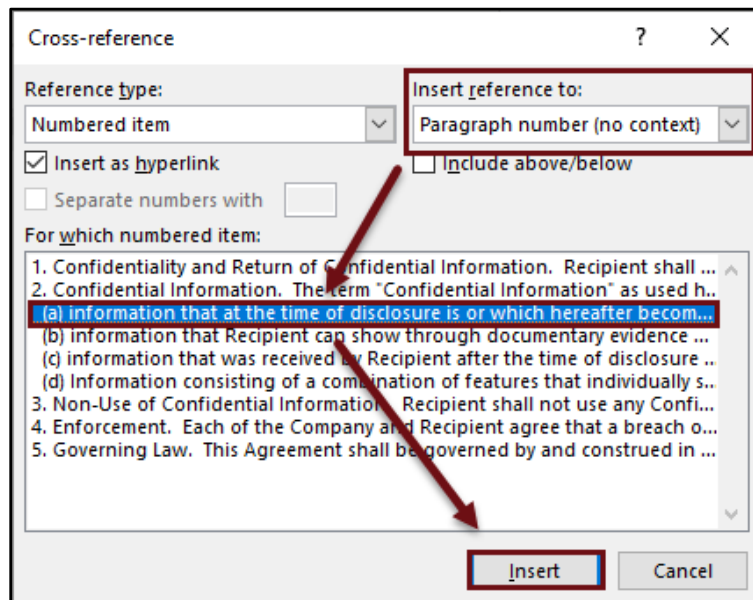


FIGURE 37-39

Repeat the foregoing process for paragraphs (b) and (c). The reason we chose "no context" was so that only the subparagraph letter would appear. If we chose Paragraph number or Paragraph

number (full context), we would have inserted 2(a), 2(b) and 2(c). There's nothing wrong with that, but we didn't need the parent paragraph number in this case.

## Step Sixteen - Generate Tables of Contents and Authorities Properly

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** → **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 29 and Chapter 30.

# CHAPTER 38

# ENVELOPES

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

## Creating an Envelope

To print an envelope:

1. If the addressee's name and address appear at the top of the letter, select them.
2. Click the **Mailings ribbon** → **Create group** → **Envelope button**.
3. If the name and address were not already on the letter, type them under **Delivery address**.

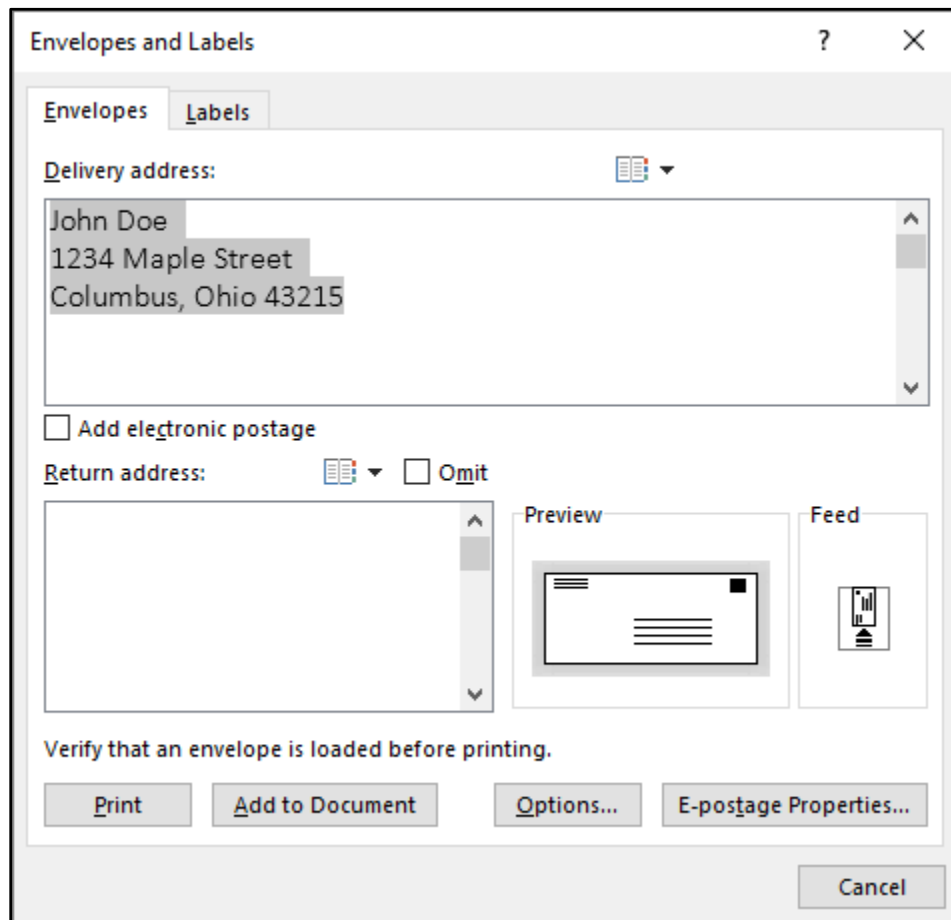



FIGURE 38-1

4. Either click **Print** to print the envelope separately from the letter or click **Add to Document** to add the envelope to the top of the document.



## Changing the Envelope Formatting

The envelope's delivery and return address formatting is controlled by 2 styles: Envelope Address and Envelope Return. To modify them:

1. Open the **Styles pane** by clicking the **Home ribbon** → **Styles launcher**.
2. Click the **Manage Styles button**  at the bottom of the **Styles pane**.
3. Click on the **Edit tab** and scroll down until you find the **Envelope Address** and **Envelope Return** styles. Click on them individually, then click the **Modify... button**.

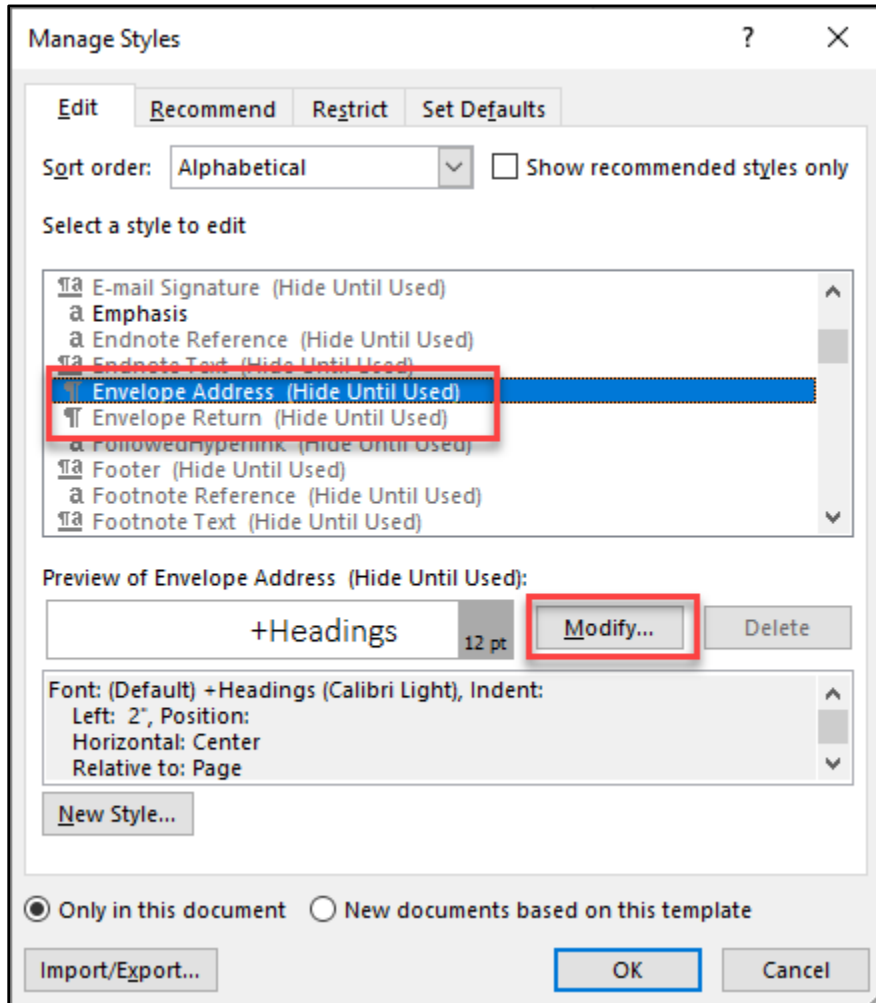


FIGURE 38-2

4. Click the **Format button** → **Font**, and make the changes you want.
5. Click the **Format button** → **Paragraph**, and make any changes you want, such as changing the line spacing to single.

# CHAPTER 39

# ENDNOTES AND FOOTNOTES

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto:manuals@affinityconsulting.com).

## Footnotes

### Inserting Footnotes

1. Ensure you're working in the Print Layout view. On the **View ribbon**, in the **Views group**, click on **Print Layout**.
2. Place the cursor where you would like to insert the footnote reference number in the body of your document.
3. On the **References ribbon**, in the **Footnotes group**, click on **Insert Footnote** (SK: **Ctrl + Alt + F**).
4. Enter the text of the footnote.

### Footnote Formatting

To change the formatting or position of the footnote on the page, on the References ribbon:

1. Click on the Footnotes launcher.

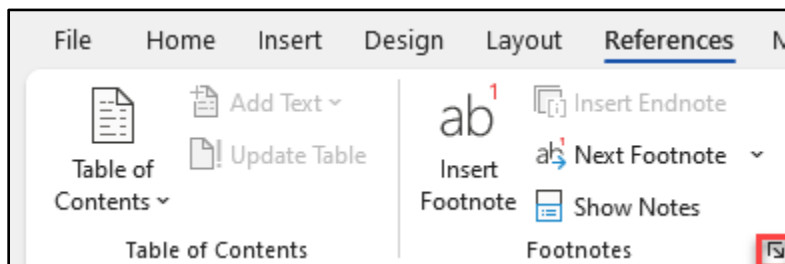


FIGURE 39-1

- From the Footnote and Endnote dialog, you can change where they appear, the number format, and more.

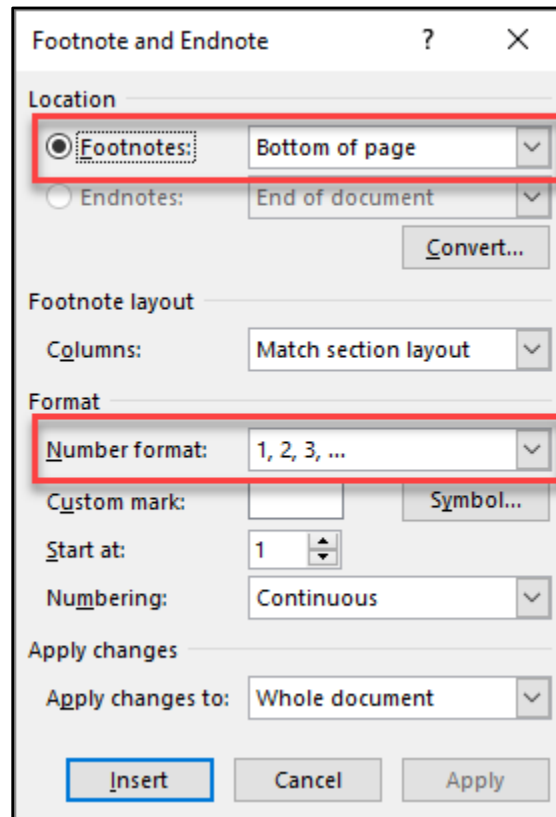



FIGURE 39-2

## Deleting Footnotes

Highlight the footnote reference number in the body of the document and hit the Delete button on your keyboard.

## Preventing Footnotes from Breaking Across Pages

By default, Word will allow long footnotes to span across several pages. The Footnote style controls whether footnotes can break across pages.

- Open the **Styles pane** by clicking the **Home ribbon** → **Styles launcher**.
- Click the **Manage Styles button**  at the bottom of the **Styles pane**.
- Locate the Footnote Text style and click **Modify...**
- Click the **Format button** → **Paragraph** → **Line and Page Breaks tab** → check **Keep lines together**.

## Changing the Footnote Separator Line

To change the line that separates the body of the documents from the footnotes:

- Switch to Draft View. On the **View ribbon**, click on the **Draft button**.

2. Click the **References ribbon** → **Footnotes group** → **Show Notes button**. At the bottom of the page, you'll have an option to select the footnote separator and change it to a different type of line or series of characters. You can also change the Endnote separator this way, by selecting the endnote separator instead of the footnote separator.

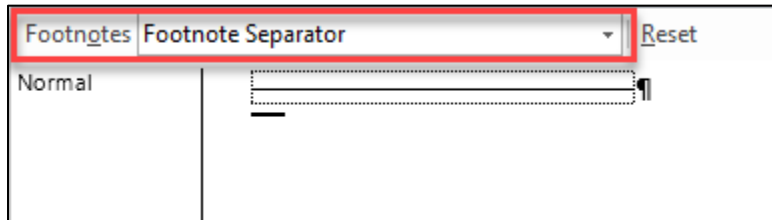


FIGURE 39-3

## Endnotes

### Inserting Endnotes

1. Ensure you're working in the Print Layout view. On the **View ribbon**, in the **Views group**, click on **Print Layout**.
2. Place the cursor where you would like to insert the endnote reference number in the body of your document.
3. On the **References ribbon**, in the **Footnotes group**, click on **Insert Endnote**.
4. Enter the text of the endnote.

### Endnote Formatting

To change the formatting or position of the endnote on the page, on the References ribbon:

1. Click on the Footnotes launcher.

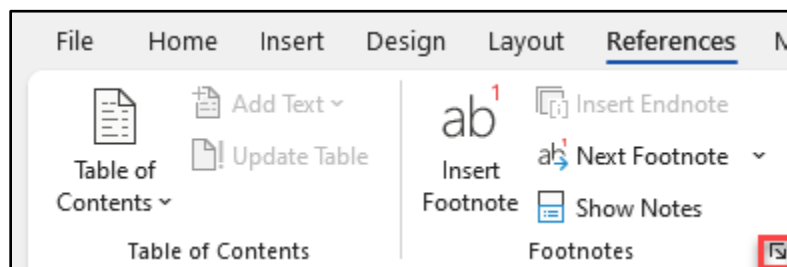


FIGURE 39-4

- From the Footnote and Endnote dialog, you can change where they appear, the number format, and more.

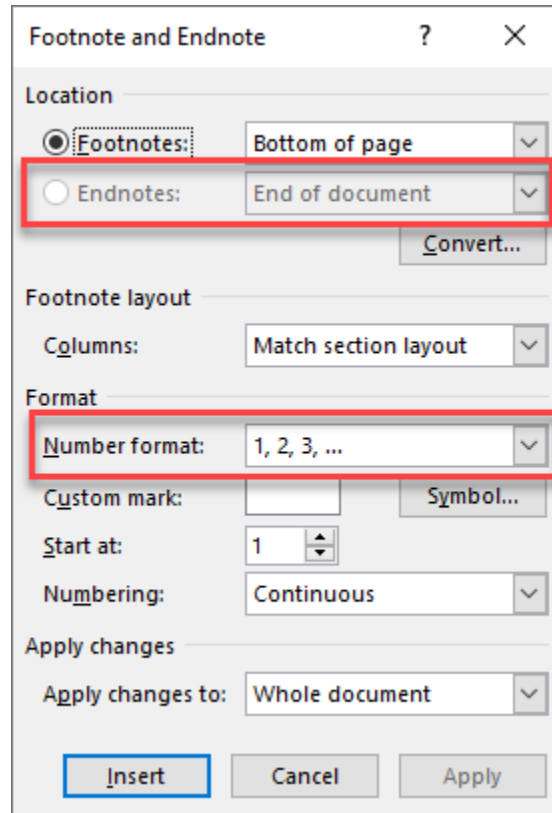


FIGURE 39-5

## Deleting Endnotes

Highlight the endnote reference number in the body of the document and hit the Delete button on your keyboard.

## Converting Between Endnotes and Footnotes

### Converting All Endnotes or Footnotes

To convert endnotes to footnotes or footnotes to end notes:

- Click the **References ribbon** → **Footnotes launcher**.

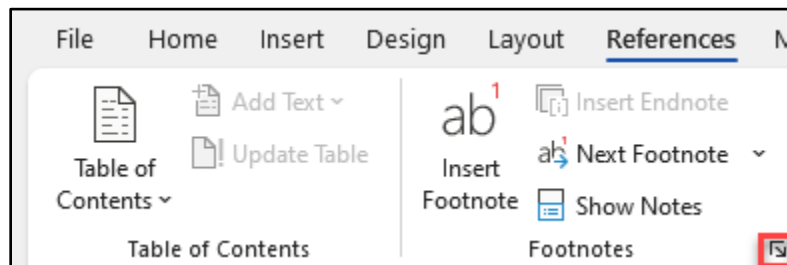


FIGURE 39-6

- Select **Convert...** to convert all endnotes to footnotes, or vice versa.

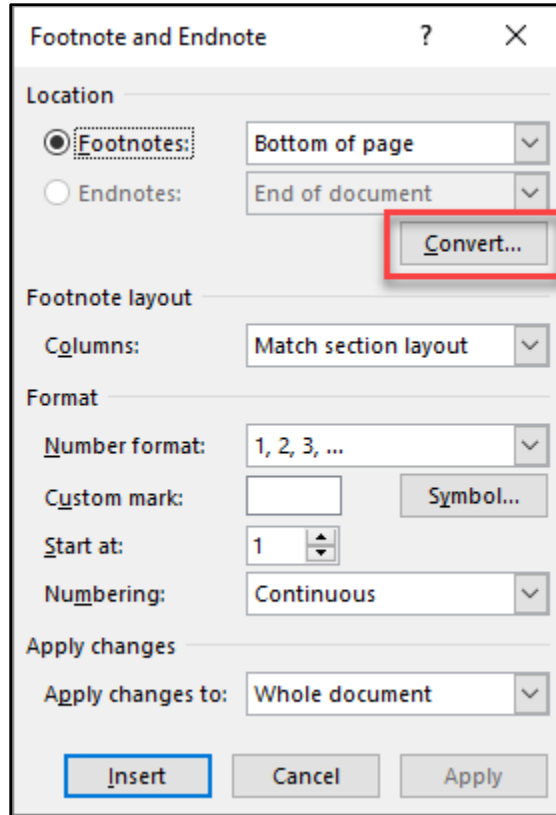


FIGURE 39-7

3. Select the type of switch to be made.

### Converting Just One Note

1. Right-click on the footnote/endnote.
2. Select **Convert to Endnote/Footnote**.

# CHAPTER 40

## TABLES

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

Tables are similar to spreadsheets in that they're comprised of rows and columns of cells that you can fill with text and graphics. Tables are often used as a means of organizing information or aligning columns of text and/or numbers. Word also allows you to sort data and perform mathematical calculations in a table.

### Inserting Tables

To insert a table:

1. On the **Insert ribbon**, click on the **Table button**.
2. Select the desired number of rows and columns.

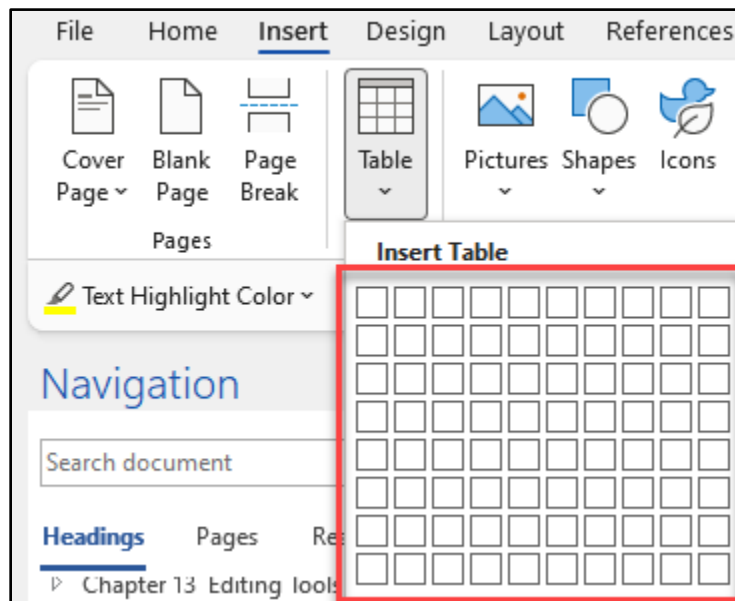


FIGURE 40-1

Alternatively, instead of selecting the number of rows and columns, click on **Insert Table...** and enter the number of columns and rows.

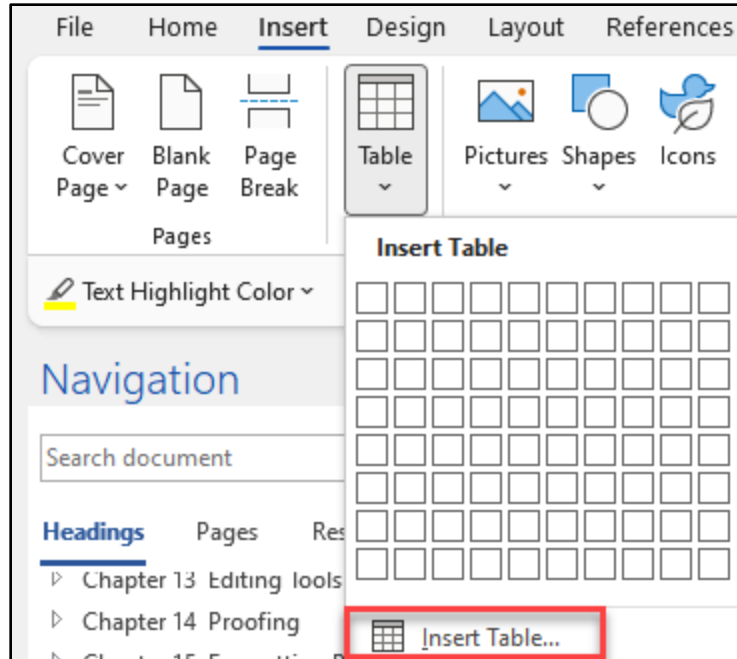


FIGURE 40-2

## Editing Tables

### Column Width and Row Height

By default, every table will automatically resize cells to fit their contents. To prevent the cells from resizing:

1. Right-click on the table, and select **Table Properties...**
2. On the **Table tab**, click on the **Options... button**.



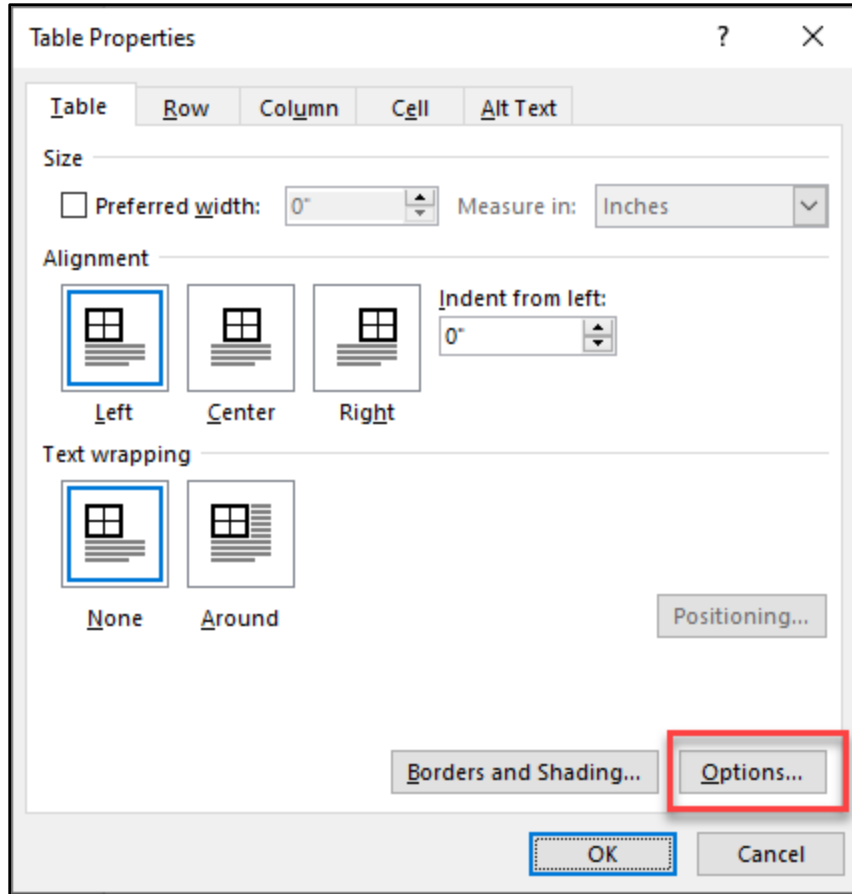


FIGURE 40-3

3. Under **Options**, uncheck the box to **Automatically resize to fit contents**.

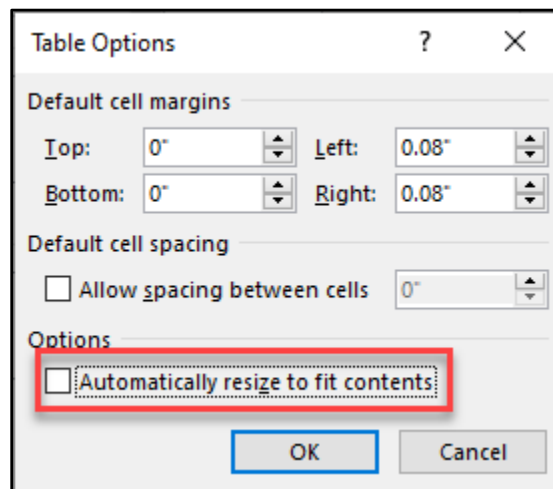


FIGURE 40-4

### Changing the Width of a Column

The width of a column can be changed using any of the following methods:

1. Hover your arrow over the vertical line between columns and when the cursor changes from the standard arrow to a left/right arrow, drag-and-drop the vertical border to the left or right.
2. In the ruler, drag-and-drop the column separator.

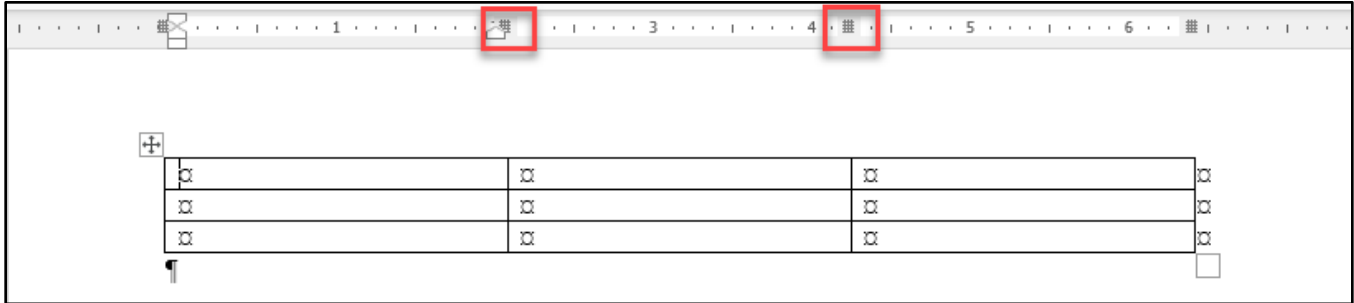


FIGURE 40-5

3. Right-click in the column to be resized, and select **Table Properties...**. On the **Column tab**, enter a new **Preferred width**.

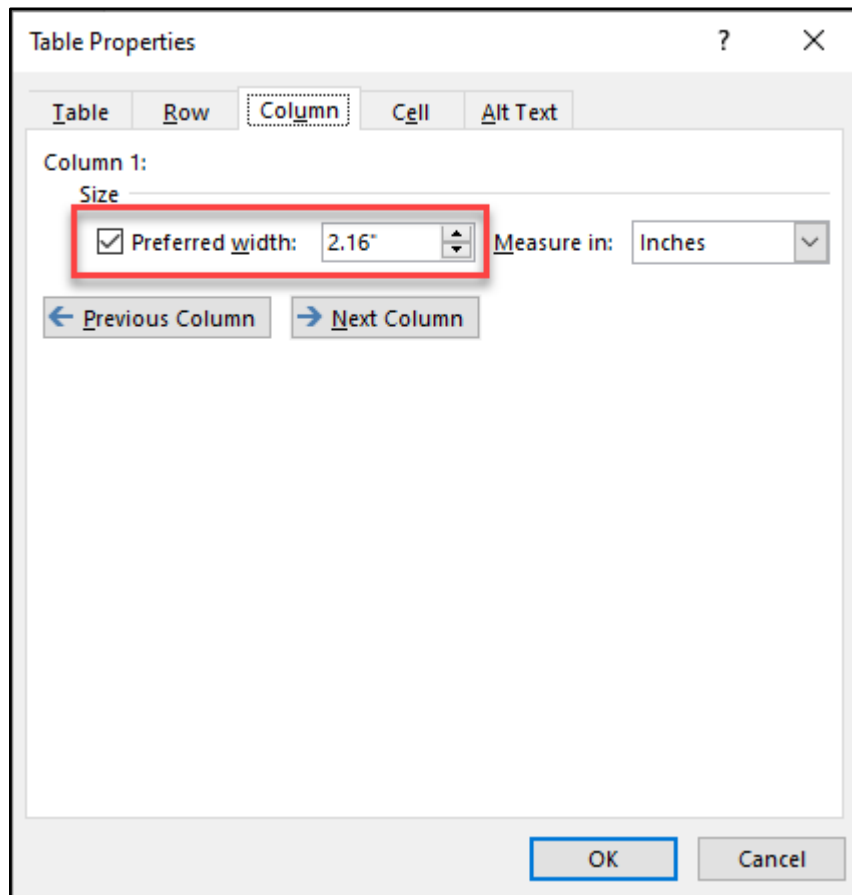


FIGURE 40-6

4. Click in the column to be resized. On the **Table Layout ribbon**, enter a new **Width**.

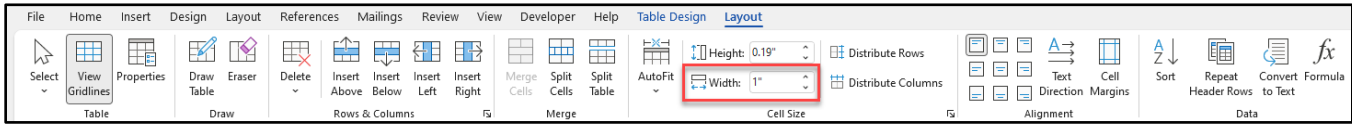


FIGURE 40-7

### Changing the Height of a Row

The height of a row can be changed using any of the following methods:

1. Hover your arrow over the horizontal line between rows and when the cursor changes from the standard arrow to a up/down arrow, drag-and-drop the horizontal border up or down
2. Right-click in the row to be resized, and select **Table Properties...**. On the **Rows tab**, check the box to **Specify height**, and enter a height.

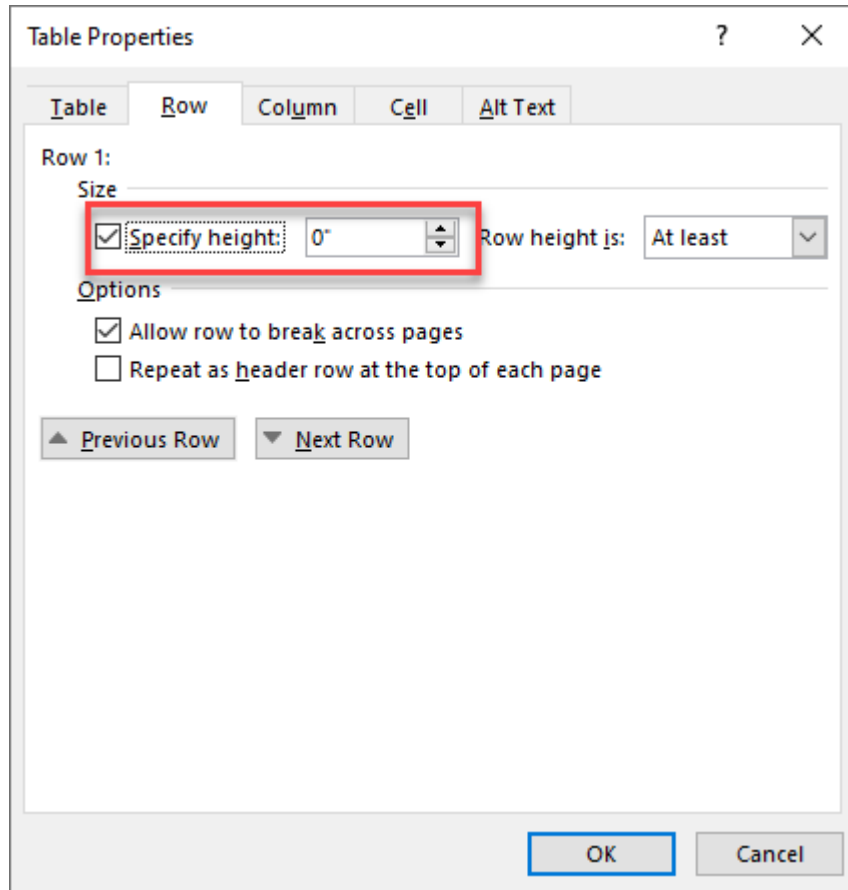


FIGURE 40-8

3. Click in the row to be resized. On the **Table Layout ribbon**, enter a new **Height**.

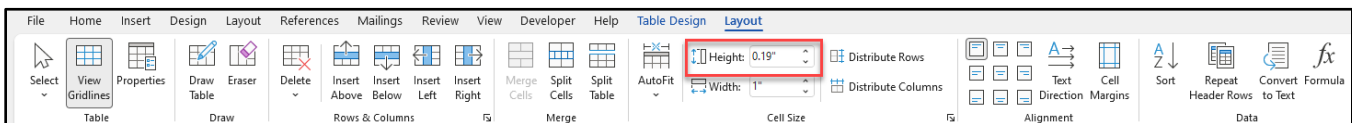


FIGURE 40-9

## Adding Rows and Columns

Rows and columns can be added several ways:

1. Hover the mouse on the edge of the table between two rows or columns. Click on the **+** symbol to insert a new row or column.

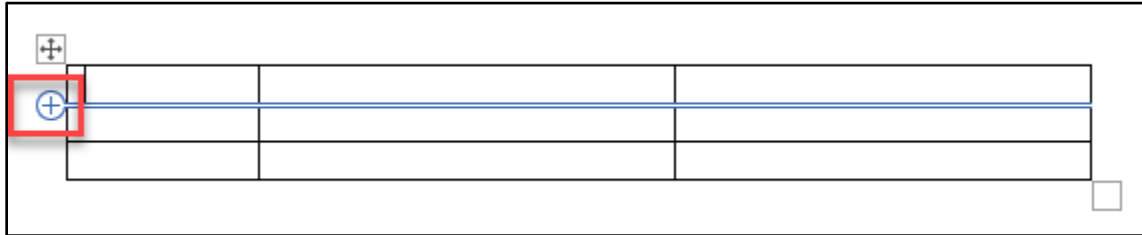


FIGURE 40-10

2. Right-click on the row/column next to where the new row/column needs to be inserted. Click on **Insert**, and select the desired result.

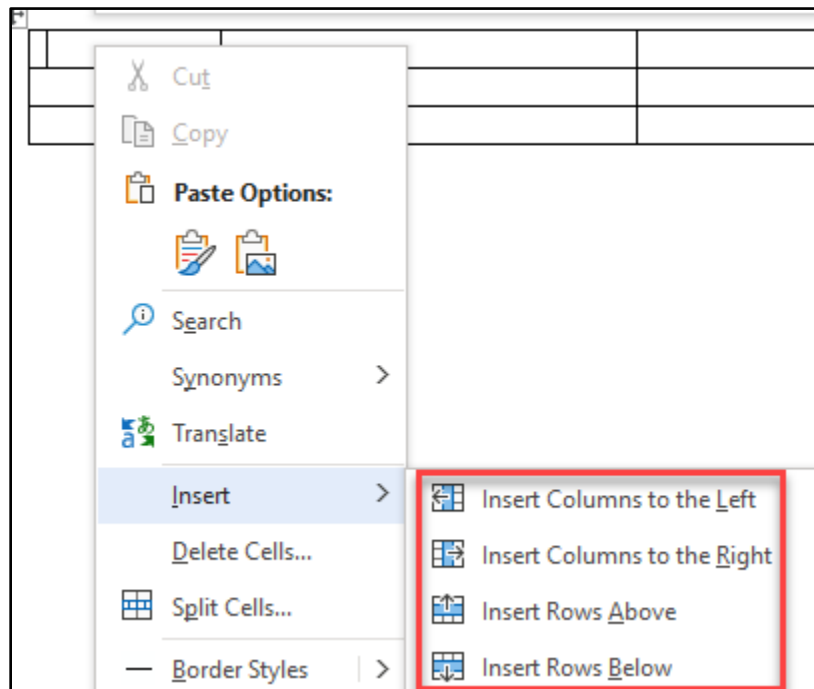


FIGURE 40-11

3. Click in the row/column next to where the row/column needs to be inserted. On the Table Layout ribbon, in the Rows & Columns group, click on the desired result.

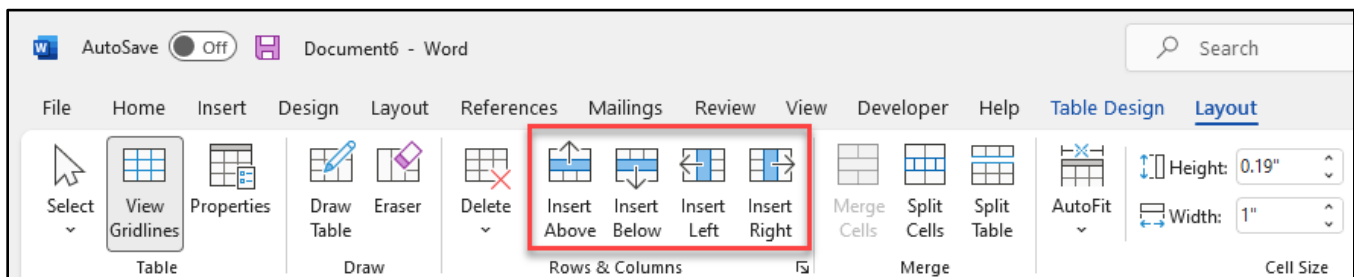


FIGURE 40-12

4. Click in the last cell in the table (in the bottom, right-hand corner). Hit the tab key to insert a new row at the bottom of the table.

## Deleting Rows and Columns

Rows and columns can be deleted several ways:

1. Right-click in the row/column to be deleted. Click on **Delete**. Select **Delete entire row/column**.
2. Click in the row/column to be deleted. On the **Table Layout ribbon**, click on **Delete**, and select **Delete Columns/Rows**.

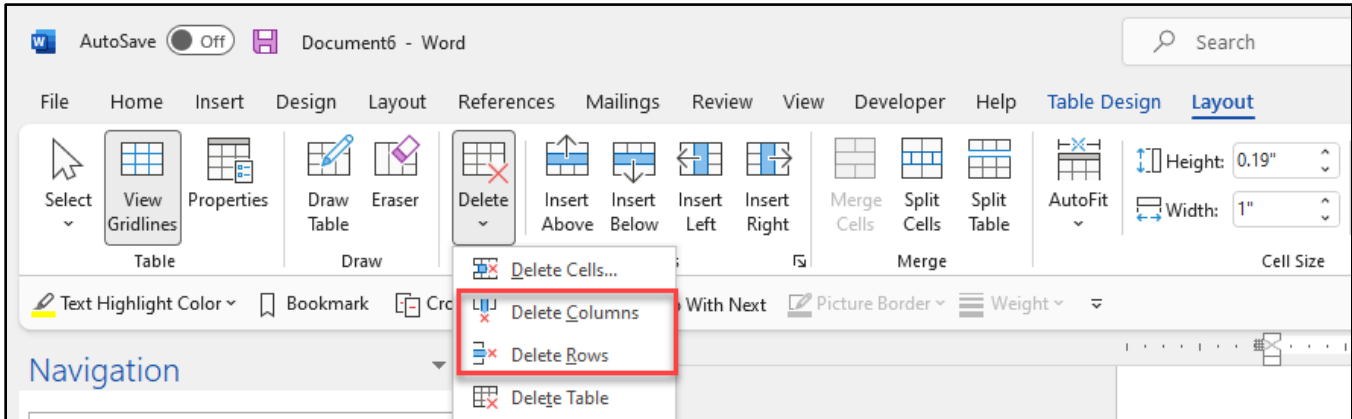


FIGURE 40-13

## Rows Breaking Across Pages

When a table breaks over one or more pages, you can control whether the contents of an individual row are permitted to break across two pages.

1. Select the rows to be modified.
2. Right-click in the selected rows, and select **Table Properties...**
3. On the **Rows tab**, check or uncheck the box to **Allow row to break across pages**.

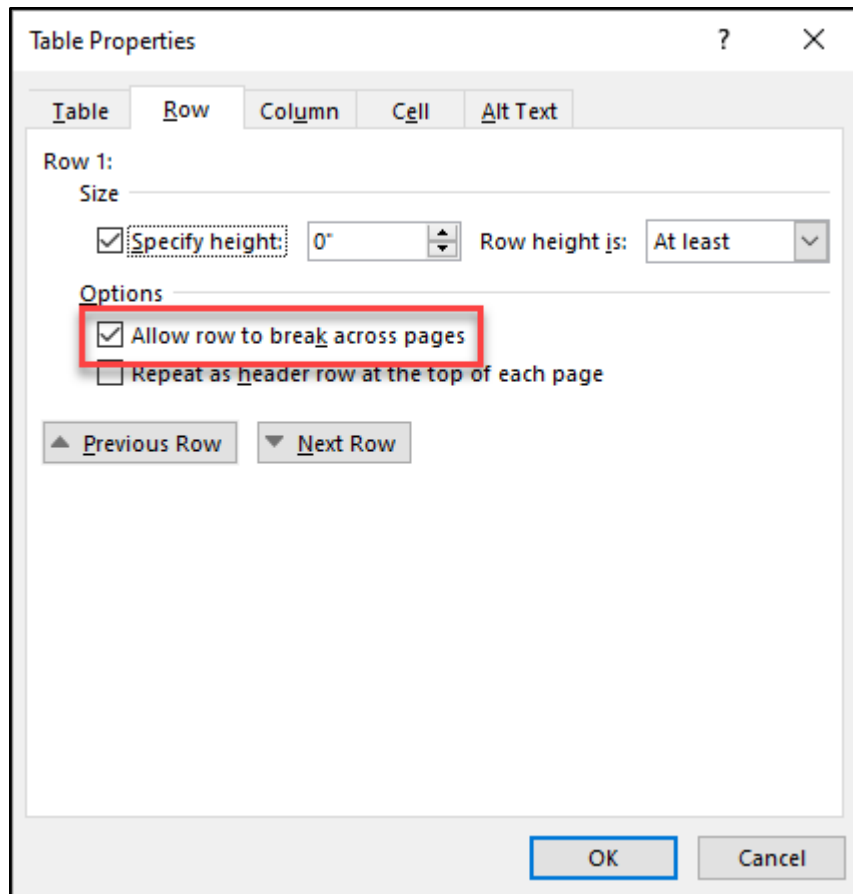


FIGURE 40-14

## Repeating Rows Across Pages

When a table breaks across two or more pages, you can repeat one or more rows across the top of the table on each page.

1. Select the rows to be repeated.
2. Right-click in the selected rows, and select **Table Properties...**
3. On the **Rows** tab, check the box to **Repeat as header row at the top of each page**.

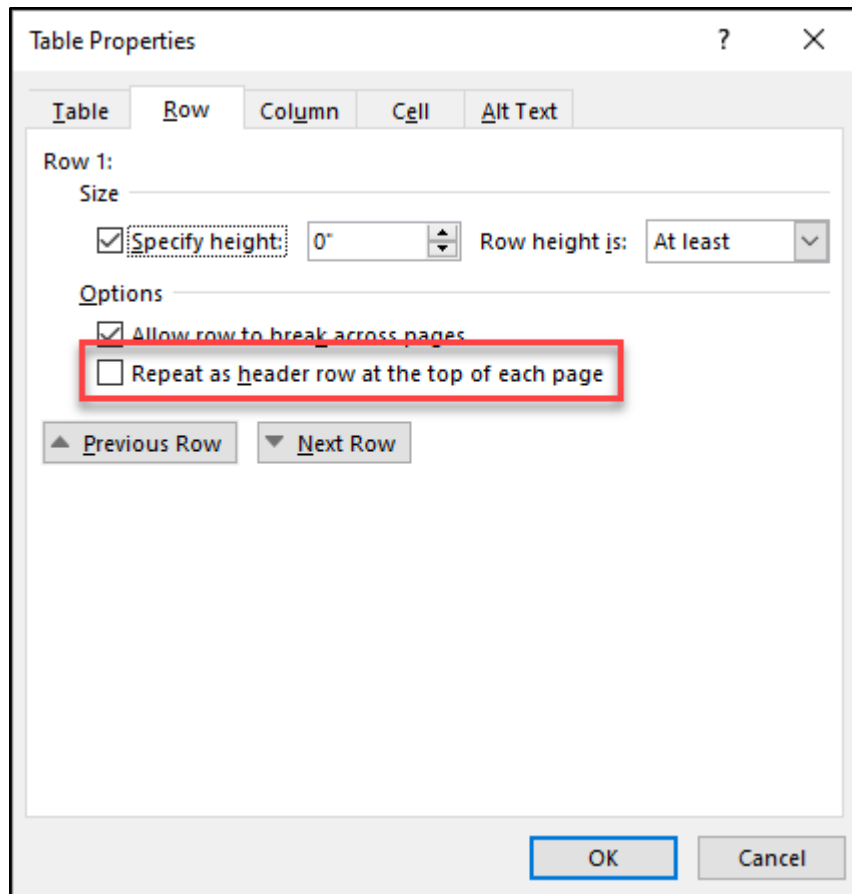


FIGURE 40-15

## Formatting Tables Borders

New tables have borders around each cell by default. Borders can be edited on a cell-by-cell basis or across an entire table. Select the cell(s) to be changed or the entire table. Once the cell(s) or table is selected, there are several options:

1. On the **Table Design ribbon**, select the desired settings in the **Borders group**.



FIGURE 40-16

2. On the **Table Design** ribbon, click on the **Borders launcher**. On the **Borders** tab, select the desired style, color, and width. Then click on borders in the **Preview** to change them.

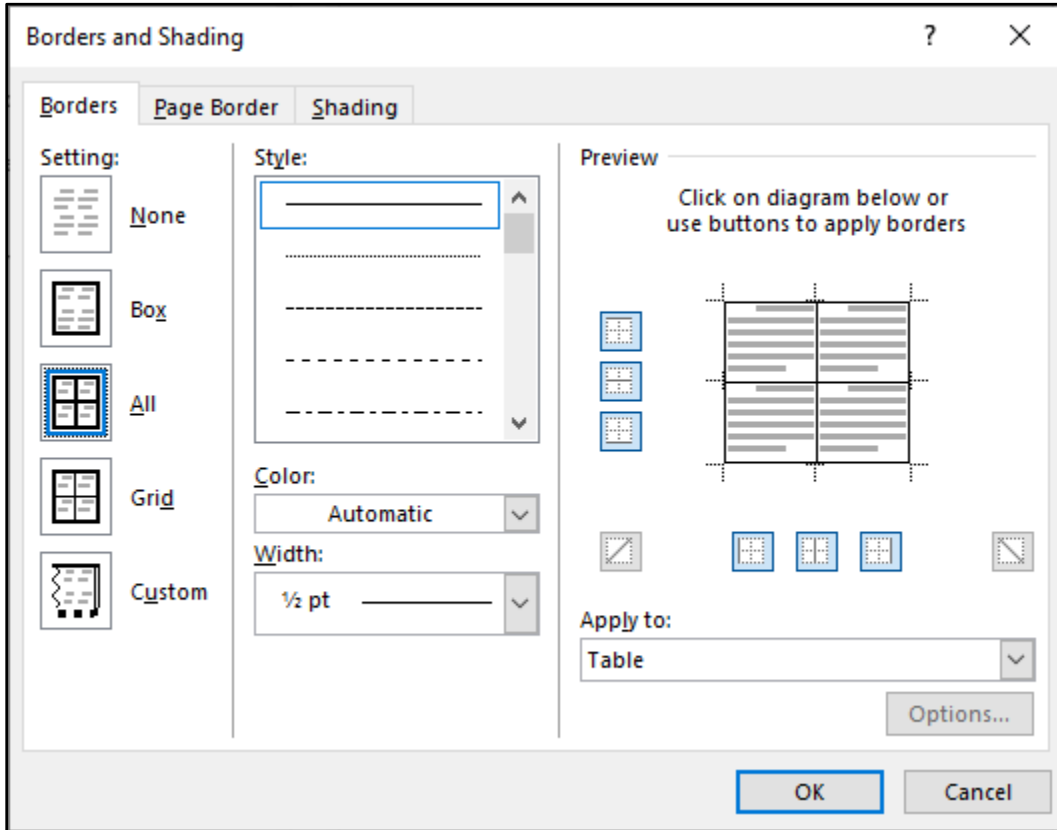


FIGURE 40-17

## Shading

Shading can be added or edited on a cell-by-cell basis or across an entire table. Select the cell(s) to be changed or the entire table. Once the cell(s) or table is selected, there are several options:



1. On the **Table Design ribbon**, click on **Shading** and select the desired color.



FIGURE 40-18

2. On the **Table Design ribbon**, click on the **Borders launcher**. On the **Shading tab**, select the **Fill color**.

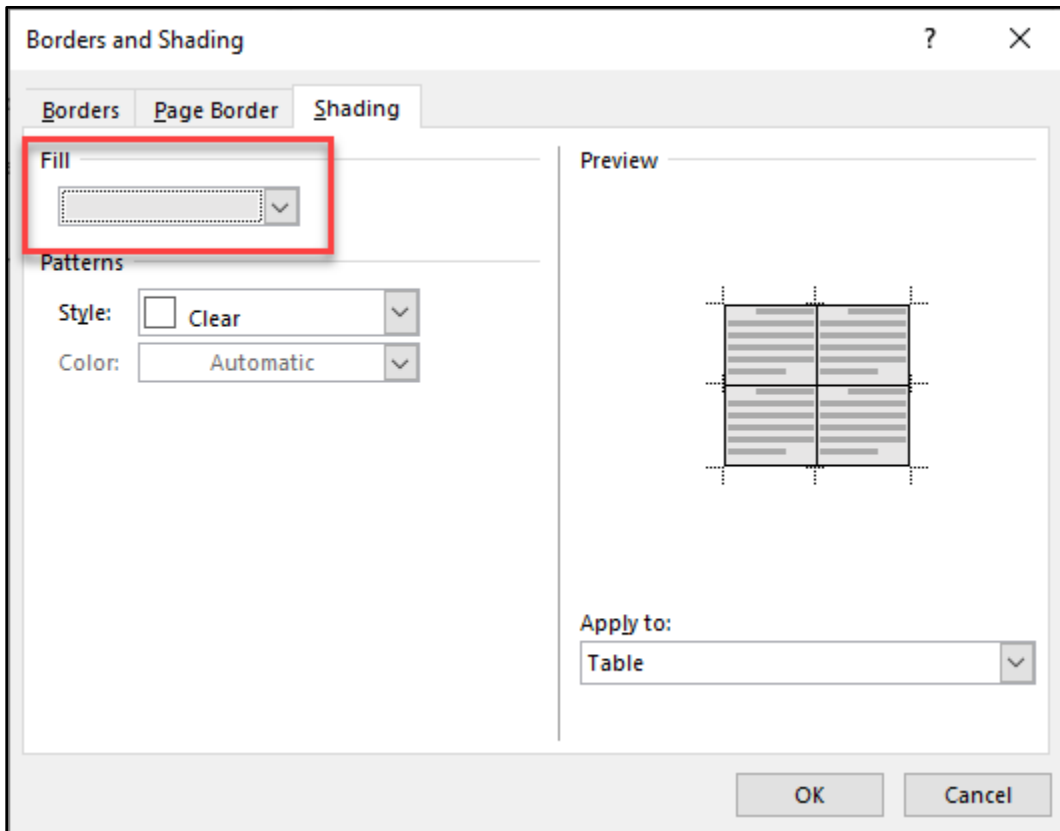


FIGURE 40-19

## Sorting Data in a Table

1. To sort data in a table, on the **Table Layout ribbon**, in the **Data group**, click on **Sort**.
2. Under **Sort by**, select the column on which to sort the data.

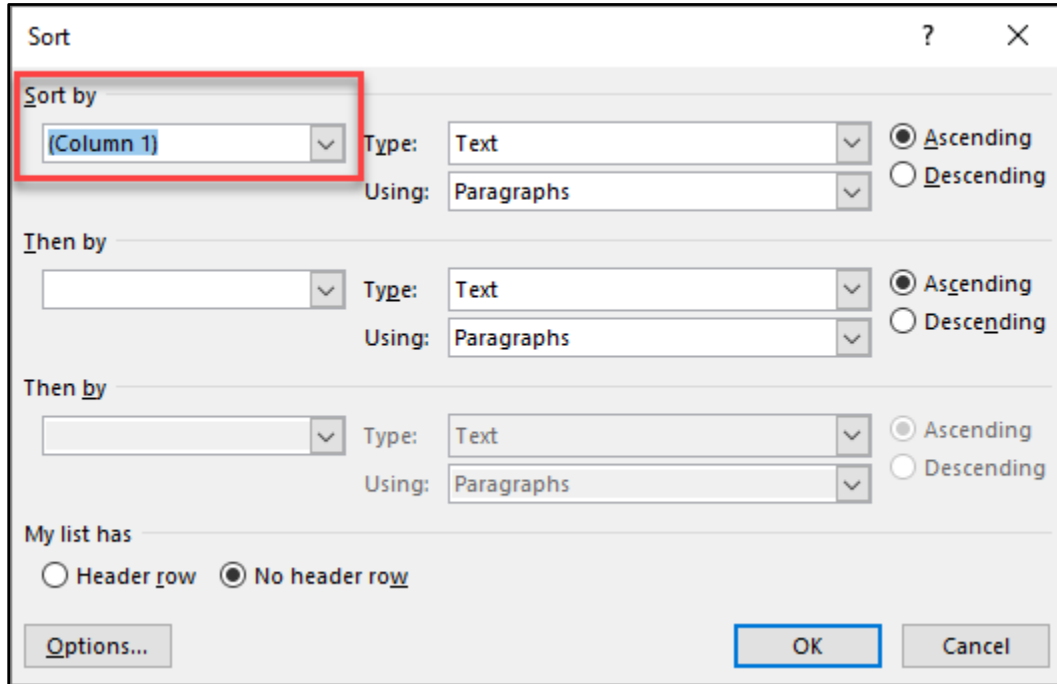


FIGURE 40-20

3. To further refine the sort if two or more rows contain the same value, add columns under **Then by**.

## Converting Text to Table

To convert existing text to a table:

1. Select the text to be converted.
2. On the **Insert ribbon**, in the **Tables group**, click on Table, then select **Convert Text to Table...**
3. Select which character separates the text between cells. Most often this will be tabs.

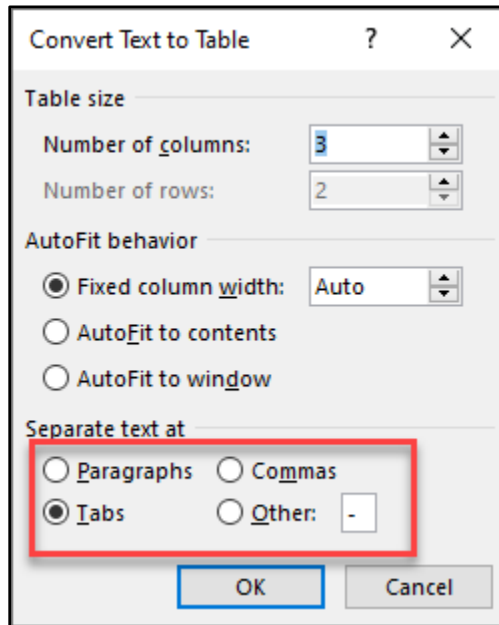


FIGURE 40-21

## Converting Tables to Text

To convert a table to regular text,

1. On the **Table Layout ribbon**, in the **Data group**, click on **Convert to Text**.

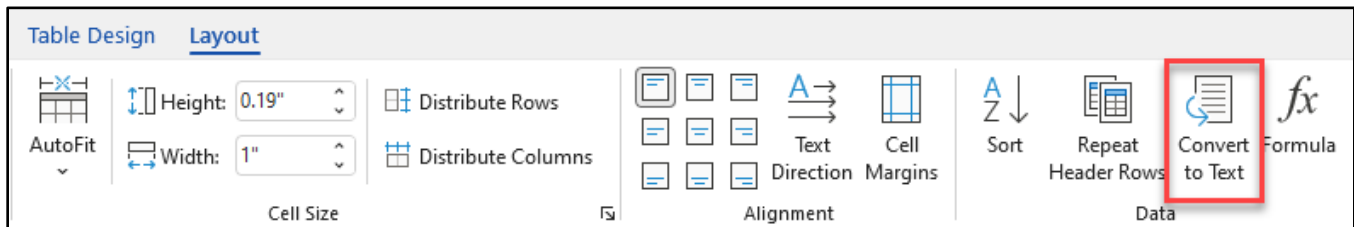


FIGURE 40-22

2. Select which character to use to separate the cell contents.

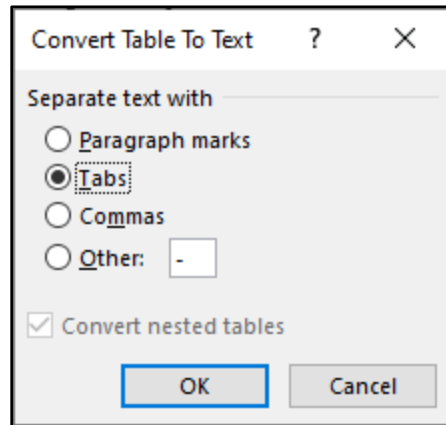


FIGURE 40-23

## Performing Calculations

Assume you are working with the following table and you would like it to auto-calculate:

Description	Hours	Rate	Total
Last Will and Testament	1.5	\$150.00	
Durable Power of Attorney	0.4	\$150.00	
Revocable Trust	3.9	\$150.00	
TOTAL			

TABLE 36.1

In order to perform calculations, you must use the addresses of cells and they work exactly like an Excel spreadsheet. Imagine a letter over each column and a number to the left of each row in order to figure out the address of each cell. To insert formulas in each cell, using the above example, execute the following steps.

1. Place your cursor in the fourth column on the Last Will and Testament row (row 2 - right below "Total"). Go to the **Table Tools Layout ribbon** ► **Data group** ► **Formula button**. Delete Word's guessed formula (=SUM(LEFT)) and replace it with =b2\*c2. Choose a number format of \$#,##0.00;(\$#,##0.00) and click **OK**.

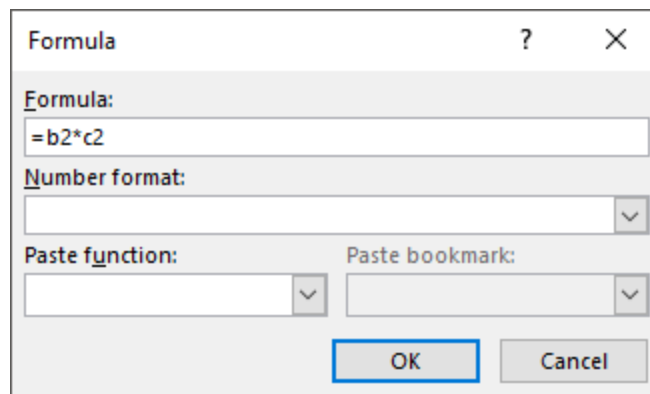


FIGURE 40-24

2. Repeat Step 1 for the 3<sup>rd</sup> and 4<sup>th</sup> rows, changing the cell addresses as appropriate (=b3\*c3 and =b4\*c4, respectively).
3. Now click in the cell D6 and go to **Table Tools Layout ribbon** → **Data group** → **Formula button** . The formula =SUM(ABOVE) (which Word probably guessed) is correct so simply choose a number format and click **OK**.
4. Your table should now look like this:

Description	Hours	Rate	Total
Last Will and Testament	1.5	\$150.00	\$ 225.00
Durable Power of Attorney	0.4	\$150.00	\$ 60.00
Revocable Trust	3.9	\$150.00	\$ 585.00
<b>TOTAL</b>			<b>\$ 870.00</b>

TABLE 36-2

Unlike an Excel spreadsheet, If you change any of the hour or rate numbers, the totals will not automatically update. In order to update the table, select the last column and hit the **F9 key**.

# CHAPTER 41

## EXHIBIT NUMBERING

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

Legal documents often contain exhibits or schedules which are attached to the end of the document and are typically numbered or lettered (i.e., Exhibit A). These exhibits and schedules are often referenced in the body of the document. Problems can arise when you insert a new exhibit or schedule which necessitates the renumbering of the existing ones.

### Auto-Numbering/Lettering Exhibits and Schedules

The following instructions show you how to automatically number/letter your exhibits, schedules, etc. A particular style called Caption will automatically be applied to those titles and you are not going to like how they look. So first, follow the steps below to insert the titles to your exhibits or schedules, then see the instructions following this (entitled Fixing the Caption Style) which explain how to get the titles formatted properly (by modifying the Caption style). To insert an auto numbered or lettered exhibit, follow these steps:

1. Place your cursor at the top of your exhibit and click **References ribbon** → **Captions group** → **Insert Caption button**.
2. Choose your **Label** (i.e., Figure, Equation, Table). If you don't see one you like (such as Exhibit), click **New Label...** and make your own.

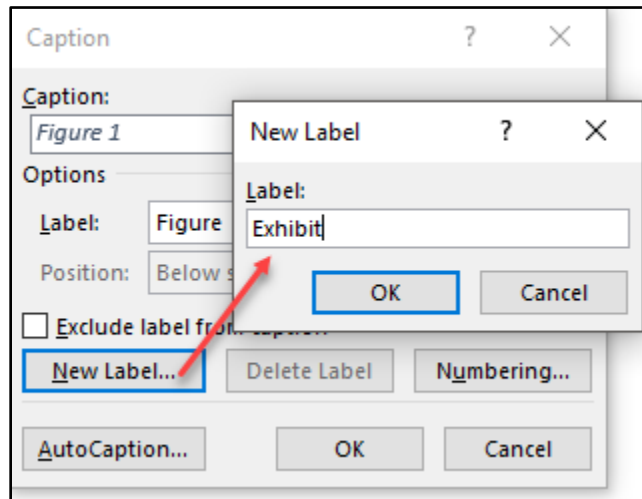


FIGURE 41-1

3. Click the **Numbering... button** to change the label (A B C, 1 2 3, I II III, etc.).

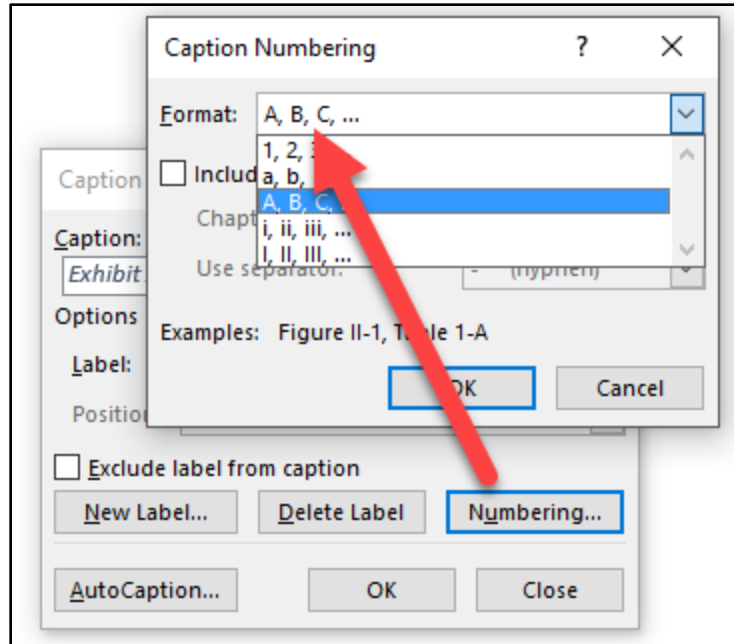


FIGURE 41-2

4. Click **OK**.

Each time you add an exhibit, repeat the above steps to insert the exhibit number or letter. If you insert exhibits in front of one you've previously setup, the letters or numbers will automatically adjust.

## Fixing The Caption Style

As indicated above, you'll want to reformat your caption by modifying the Caption style. The default formatting is blue text, left justified. To fix this:

1. Open your styles pane by clicking the **Home ribbon** → **Styles launcher** (SK: **Ctrl + Alt + Shift + S**).
2. Locate the Caption style in the styles pane, right-click it and choose **Modify....**
3. Click the **Format button** at the bottom of the dialog and choose **Font**. Change the font to what you would like in your document (for example, Times New Roman, Bold, All Caps, change the color from blue to black), then click OK.
4. Click the **Format button** again and this time choose **Paragraph**. Change the paragraph formatting to what you would like (for example, centered, 12 pt. after, keep with next), then click OK.
5. Once you've made all of your changes, click **OK** to exit the Modify Style dialog and get back to your document. Your captions should now all look the way you want them to. If not, re-edit the Caption Style and make further changes.

## Cross Referencing Exhibits and Schedules

After you've setup your exhibits as outlined above, you can cross reference to them anywhere in the document they're attached to. To do this, follow these steps:

1. Click **Insert ribbon** → **Links group** → **Cross-reference button**. You can also find this on the **References ribbon** → **Captions group** → **Cross-reference button**.
2. Under **Reference type**, choose **Exhibit** (or whatever label you chose). Your exhibits will appear in the **For which caption window**.
3. Choose the Caption you want to reference and then choose the appropriate item under the **Insert reference to label**, such as "Only Label and Number".
4. Click **Insert**.



# CHAPTER 42

# WORKING WITH

# WORDPERFECT FILES

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## Why Word Users Need to Understand How To Handle WordPerfect Documents

There are many reasons a Word user might have to deal with a WordPerfect ("WP") document. For example:

- Opposing counsel uses WP and emails you a WP document asking for your proposed changes.
- Your client uses WP and wants to be able to trade documents with you electronically.
- Your office used WP in the past but switched to Word. As a result, many of your existing documents are in WP format and need to be converted to Word so you can use them in the future.
- Your office has a mix of Word and WP so depending upon who drafted a document, it could be in either format.

For many legal users, there's really no avoiding the occasional WP document. The problem is that converting WP documents to Word and vice-versa often creates a formatting nightmare. Further, it's not always easy to convert WP documents to Word. In this chapter, we'll explain how to deal with those problems.

The big question here is whether you need to convert all of your existing documents to Word. My professional advice is that you DO NOT. Statistics show that users retrieve and open less than 15% of their existing documents going forward. Therefore, if you convert all of the documents, then you've likely wasted 85% of your time and effort. Instead, a better approach is to identify key documents you're likely going to use in the future and only convert them to Word.

## Recommend Approaches for the Occasional Need

### Word Users Who Occasionally Edit WP Documents

The bottom line is that converting from WP to Word or Word to WP is going to create extra work for you. Depending upon the complexity of the formatting involved with the subject document, it could be a *lot* of work. If I'm primarily a Word user but have to deal with an occasional WP document, then I'm just going to buy a copy of WP and install it on my computer. WP is not difficult to use and it's going to be a lot easier for me to make edits in the native format. For

example, if someone emails me a WP document asking for my proposed changes, all I have to do is follow these steps in WP:

- Open the document in WP.
- Click the **File menu** → **Document** → **Review** → **Reviewer button**.
- Make any changes (it will track all changes I make using a feature equivalent to Word's Track Changes feature – see Tracking Changes as you Edit on page 267).

The foregoing approach will save me a lot of time compared to converting the WP document to Word, fixing the formatting problems, making my changes, and sending back a Word document which the recipient will invariably have to convert back to WP (which will cause further formatting issues).

It's generally not an expensive proposition to buy a word processor only. If you don't want to save some money, look for a version of WordPerfect that is one version behind the current version.

## WP Users Who Occasionally Edit Word Documents

See above because the same rule applies. If you rarely have to edit Word documents and want to make it easy on yourself, buy a copy of Word and keep the document in the format you received it in.

## Converting WP Documents to Word

Most often, this applies to offices who used to use WP and now use Word. Since most legal documents are created by copying an existing document and making changes, offices that used to use WP often have a lot of templates or precedent documents that require conversion.

### Option 1 - Let Word Do the Conversion

Word can convert WP documents (in most cases). Click the **File menu** → **Open** → change the file selection to **All Files (\*.\*)** → browse to a WP document → click **Open** (SK: **Ctrl + O**). Most of the time, Word will open the WP document for editing (assuming you don't get an error of some type). However, Word will create formatting problems in the resulting document that you'll have to fix (more on this later). You may also get random errors from Word informing you that it cannot convert; and you'll have to do the documents one-at-a-time.

### Option 2 - Let WP Do the Conversion

If you have WP, you can open any WP document, click **File** → **Save As** → change the **File Type** to MS Word This will create a Word file that Word can certainly open. However, you'll have the same formatting issues to fix identified in Option 1 above.

### Option 3 - Hire Someone

There are conversion services you can contact such as:

- **Litera Microsystems Conversion Services** (call 630-598-1100). Be advised Litera Microsystems only handles very large organizations so if you have fewer than 500,000 documents to convert, they might not even be interested in helping.
- **Affinity Consulting Group** - of course, we can do this for you or show you how to do it (contact us at [info@affinityconsulting.com](mailto:info@affinityconsulting.com) or call 614.340.3444).

## Option 4 - D.I.Y. Scorched-Earth Approach

With this approach, you don't let Word do the conversion. You open the WP document in either WP or Word → select all of the text (SK: **Ctrl + A**) → copy (SK: **Ctrl + C**) → create a blank, new Word document (SK: **Ctrl + N**) → paste unformatted text (see Copy, Cut and Paste on page 129 above). The objective here is to get just the raw text of the original document into a new Word document with no formatting at all (hence the name "scorched-Earth approach"). At that point, you can rebuild the formatting to match the original. See Chapter 37 for detailed instructions.

## Problems With The Foregoing Options

### Issues With Word's Conversion

If you go into Word → **File menu** → **Open** → change the file selection to **All Files (\*.\*)** → browse to a WP document → click **Open**, Word will **usually** convert the WP document and open it for editing. However, it will create a variety of formatting problems in the process.

- The insertion of {PRIVATE CODES} inside the document.
- Manual tab stops are inserted throughout the document.
- Indents and margins aren't always accurately converted.
- The insertion of unnecessary Section Breaks throughout the document (around the bottom of every page of the original document).
- Word Perfect and Word handle style definitions differently. For example, Word Perfect uses a "style definition" in the prefix of every document. These style definitions survive the Word conversion filter and may cause problems.
- File sizes can become bloated (much larger than necessary) during the conversion.
- Some of WordPerfect's special symbols, such as © and ½ are not converted correctly. They may be dropped in the new document as hollow squares.
- Sometimes, fonts will be converted into printer fonts rather than True Type fonts which can cause printing irregularities.
- Automatic paragraph numbers in WordPerfect may convert into Word "fields." Although it may look okay, this is definitely not the recommended way to number paragraphs in Word. So, paragraph numbering sometimes has to be fixed post conversion.

### Issues With WordPerfect's Conversion

You get the same formatting problems that arise when you let Word handle the conversion which are discussed above.

### Issues With a Third Party Programs

No conversion utility can convert every document flawlessly; there will always be some clean-up required on the converted documents. However, at least you can convert documents in bulk which may be worth the price of admission by itself.

## Issues With Hiring Someone

If you hire someone else to do it, it can be expensive depending upon the number and complexity of the documents you need to convert. Furthermore, if you rely on someone to do it for you, then you still don't know how to engage in self-help. On the other hand, you may have decided that you don't *want* to know how to do it or don't have the time - and that's perfectly legitimate.

## Issues With D.I.Y. Scorched-Earth Approach

This is probably the slowest method depending upon how well you know the process of modifying styles and getting the formatting applied to the raw text in the new document. On the other hand, this approach eliminates that possibility of WP baggage being brought into the Word file, you don't have to fix all of the problems Word creates when converting, the file size will not be bloated, and it guarantees file stability going forward.

## Recommended Option for You

Unfortunately, there's no right answer here because which approach is best for you depends upon your circumstances. If we're doing it for ourselves or a client, we employ always employed the Scorched-Earth Approach. The Scorched-Earth Approach takes a bit longer, but its guarantee of flawless formatting and stability make it worth it to us.

## Opening WP Documents in Word Errors

### Word's WP Converter May Not Be Installed

When Microsoft Office is installed, the WordPerfect file converters are sometimes not installed. If you get an error that Word cannot open WPD file types or that something isn't installed which is necessary for the conversion, you'll need to reinstall Microsoft Office.

### If You Have WP, Try Saving as a Word File

If reinstalling Microsoft Office doesn't fix it, or if you receive an error that the file appears to be corrupted. Open the WP document in WP and clicked **File** ➔ **Save As** ➔ **MS Word**. , If You Are Switching from WP to Word

## Cleaning Up A Document Word or WP Converts

If you want to let Word or WP handle the conversion from a WP document to a Word document, the following are steps you'll need to follow in order to clean up the mess.

### Basic Cleanup

In almost every case, you're going to have manual tabs inserted everywhere, unnecessary continuous section breaks and a few bad font conversions. Therefore, the first step is to take care of those issues.

- Remove Manual Tab Stops: To remove the tab stops, click **Ctrl + A** to select the entire document, click **Home ribbon** ➔ **Paragraph launcher** ➔ **Tabs...** ➔ **Clear All** ➔ **OK**. Of course, this may remove a few manual tab stops that were supposed to be in the document, but they're easily replaced.
- Remove Continuous Section Breaks: To remove section breaks, click **Home ribbon** ➔ **Editing group** ➔ **Replace button** (SK: **Ctrl + H**). Now click the **More button** so your

dialog looks like Figure 42-1. Click in the **Find what field**, click the **Special button** and choose **Section Break**. This will insert a ^b (Word's code for section break) into the **Find what field**. Leave the **Replace with window** blank and click **Replace All**. Word will scan through document and remove all the section breaks. Upon finishing, Word will tell you how many it deleted.

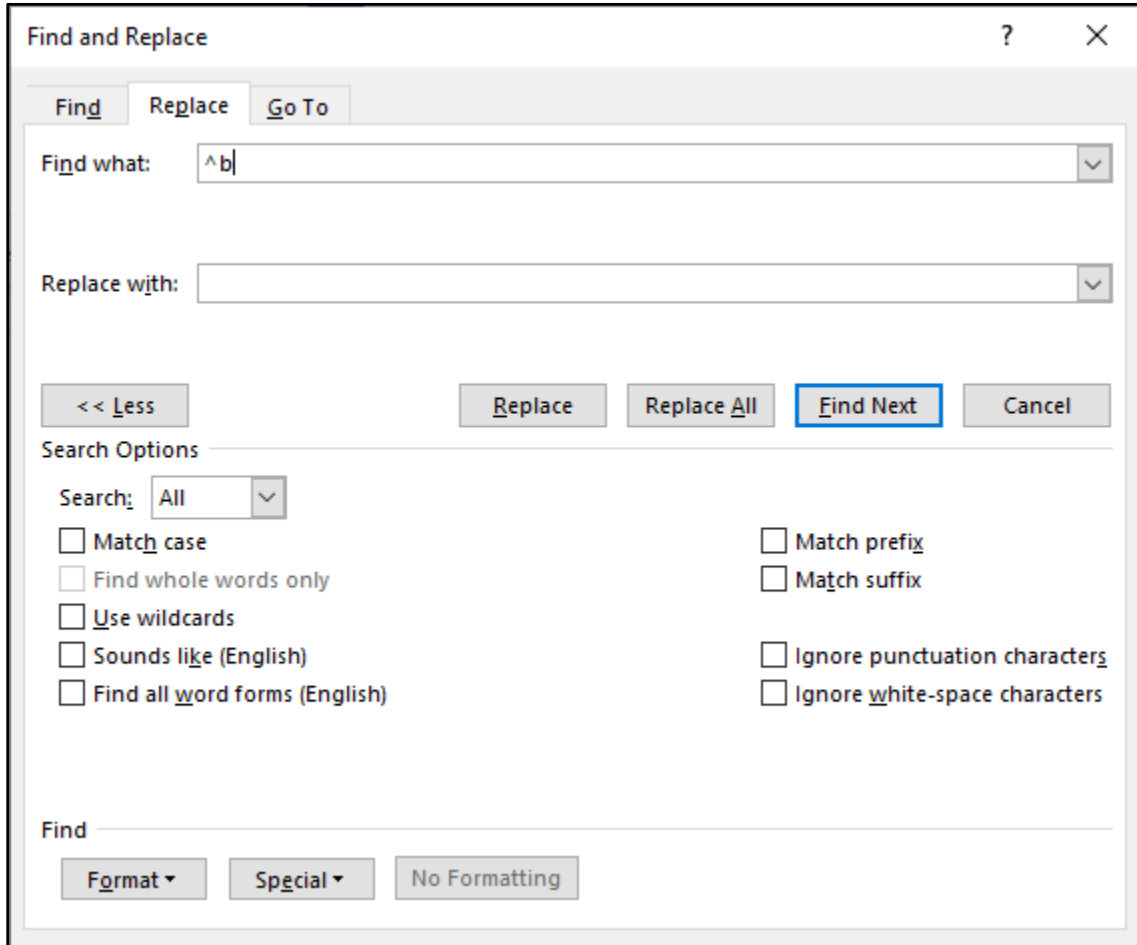


FIGURE 42-1

- **Check Page Setup:** Converting a document from WordPerfect to Word sometimes results in changes to margins, to the spacing of headers and footers, and to vertical alignment. These settings can be found in the Page Setup dialog (**Layout ribbon → Page Setup launcher**). Look in both the **Margins** and **Layout** tabs to ensure that these settings are correct. Your margins should usually be 1" all the way around and Headers/Footers "from edge" measurement in the Layout tab should be 0.5".
- **Remove Fields:** You can remove certain WordPerfect fields in the same way you remove continuous section breaks. Click **Home ribbon → Editing group → Replace... button** (SK: **Ctrl + H**). Again, click in the **Find what field**, click the **Special button** and choose **Field**. This will insert a ^d into the **Find what field**. Leave the **Replace with window** blank and click **Replace All**.
- **Fix Page Numbering:** Page numbers, in documents converted from WordPerfect to Word, are often placed in text boxes. As stated earlier in this manual, this is not the

recommended way to insert page numbers. You should re-insert page numbers as outlined above (see Our Advice on Page Numbering on page 190 above).

- **Fix Font Conversions:** First, we want to make sure that the default font for this document is correct. Click the **Home ribbon** → **Styles launcher** (SK: **Ctrl + Alt + Shift + S**). Modify the Normal style by right clicking the Normal style and clicking on **Modify...** If the font is not a True Type font (such as Times New Roman or Arial), change it to one. DO NOT check **New documents based on this template** or **Automatically update**, and click **OK**. If the formatting applied to the text in your converted document still doesn't match the default font you just set, select the entire document, and apply the Normal or Clear Formatting style. This will take the text back to its default.
- **Find and Destroy Hidden Merge Fields:** If your WordPerfect document contained any merge fields, they probably came across in the conversion, but you normally can't see them in Word. They will usually cause problems if you don't remove them. In order to see them, you need to click **File menu** → **Word Options/Options** → **Advanced** → **Show document content** → **Show field codes instead of their values** (SK: **Alt + F9**). Now they'll become visible in your converted document to the extent they weren't previously. Look for things like this: `{ FORMTEXT } { fillin "" \d "" }`, manually select and delete them. If you need the fields in your Word document, you're better off re-inserting them in Word. After you're done deleting the fields, don't forget to uncheck the **Show field codes instead of their values box** (SK: **Alt + F9**).
- **Wipe Out Document Corruption:** If there was corruption in your original WP document or a corruption occurred during the conversion, you're going to have problems. You can remove most corruption using the Open and Repair feature. Simply save and close your converted document, then follow these steps:

1. Click **File menu** → **Open** → **Browse**.
2. Select your document by clicking on it once. Now click the down arrow on the right side of the **Open button** and choose **Open and Repair**.

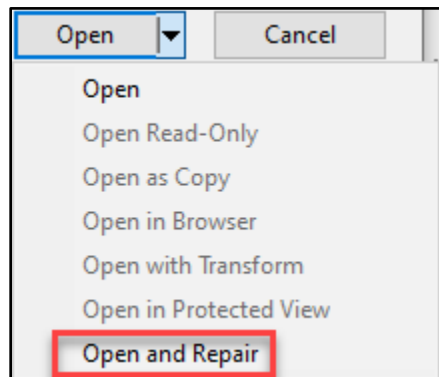


FIGURE 42-2

3. If the document had a problem, Word will tell you what it repaired and you just have to **Save** to retain the repairs (SK: **Ctrl + S**).

### Additional Cleanup Items

Click the **Home ribbon** → **Paragraph group** → **Show/Hide button**  and look for any {PRIVATE} codes which can be manually deleted.

Compare your current document against the original and replace any character or paragraph formatting which may have been wiped out during one of the previous steps.

Signature lines rarely convert cleanly so you'll probably want to re-create them using tab stops and the underline feature, see Signature Lines on page 171. Tables also tend to become a bit garbled so they may need touch-up or re-creation. See Chapter 40 starting on page 337 for a complete explanation on tables.

Finally, if your paragraph numbers were converted into Word "Fields," you'll want to replace them with automatic paragraph numbers controlled by styles. To see all of the fields in your document, click **File menu** → **Word Options/Options button** → **Advanced** → **Show Document Content**, and make sure that **Field shading** is set to **Always**. Note: this doesn't mean that the field shading will print, just that it will always be visible when you view the document in Word. If you turn on this feature and see fields for the paragraph numbers, they'll need to be replaced. See Chapter 27 starting on page 222 for a full explanation of how to create automatic paragraph numbers controlled by styles.

## Recording Current Formatting

The first thing you need to do before applying Word styles and numbering to an existing document is to write down what you're trying to re-create. In other words, diagram the outline format utilized in the document. For example, if my text looks like this:

**ARTICLE 4**

**Allocations of Profits; Losses and Credits**

**4.1** Maintenance of Capital Accounts. A separate capital account (a "Capital Account") shall be maintained for each Member. Such Capital Accounts shall be maintained and adjusted as the Managers determine in accordance with Treasury Regulations.

**4.2** Profits. After giving effect to the special allocations set forth in ANNEX B, cumulative Net Profits shall be allocated among the Members as follows:

**(a)** First, to all Members in proportion to their Sharing Ratios, in an amount equal to the excess, if any, of **(i)** the cumulative Net Losses allocated pursuant to Section 4.3(b) hereof for all prior fiscal years, over **(ii)** the cumulative Net Profits allocated pursuant to this Section 4.2(a) for all prior fiscal years;

**(b)** Next, to all Class A Preferred Members in an amount equal to the total amount of Preferred Return distributed to them in accordance with Section 5.1(a);

**(c)** The balance, if any, to all Members, in proportion to their Sharing Ratios.

**4.3** Losses. After giving effect to the special allocations set forth in ANNEX B, cumulative Net Losses shall be allocated among the Members as follows:

FIGURE 42-3

The notes should be:

- Heading 1: "ARTICLE 1" in all caps and bold, heading description in bold first letter uppercase, single spaced, centered with 12pt space after the paragraph.

- Heading 2: Number style - 1.1; first line .5" indent, single spaced, left justify, 12 pt space after the paragraph.
- Heading 3: Number style - (a); first line 1" indent, single spaced, left justify, 12 pt space after the paragraph.

## Develop Your Styles and Apply Them

Modify Heading 1, 2 and 3 to match the foregoing styles and apply them. For much more information on this, see Chapter 26 on page 215 above.

## Formatting Raw Text

You would be in this position if you follow the Scorched-Earth Approach mentioned previously. In this case, you would apply most of the steps in Chapter 37 which covers de-constructing messed up documents and re-building them. The more often you run through the progression described in that chapter, the faster you will become.



# CHAPTER 43

## COMMON SPEED KEYS

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### Speed Keys Commonly Used in Word

Delete .....	Delete text to the right of the cursor
Backspace .....	Delete text to the left of the cursor
Ctrl + END .....	Cursor to the end of the document
Ctrl + HOME.....	Cursor to the beginning of the document
Ctrl + L arrow or R arrow.....	Left or right one word at a time
Ctrl + up arrow or down arrow .....	Up or down one paragraph at a time
Ctrl + Tab .....	Insert a tab within a Table
HOME .....	Beginning of a line
END.....	End of a line
Page Up/Page Down .....	Up or down one screen at a time
Arrow Up .....	Up one line
Arrow Down .....	Down one line
Arrow Left.....	Left one character
Arrow Right .....	Right one character
Double Click a word .....	Select the word
Triple Click.....	Select the paragraph
Ctrl + A.....	Select All
Ctrl + F .....	Find text
Ctrl + G.....	Go to a page number
Ctrl + H .....	Find and replace text
Ctrl + X.....	Cut
Ctrl + C.....	Copy
Ctrl + V .....	Paste
Ctrl + F3.....	Cut to Spike
Ctrl + Shift + F3 .....	Insert Spiked text
Ctrl + S .....	Save
Ctrl + B.....	Bold
Ctrl + U .....	Underline
Ctrl + I.....	Italics
Ctrl + L .....	Left Justification
Ctrl + R.....	Right Justification
Ctrl + E .....	Center Justification
Ctrl + J.....	Full Justification
ESC .....	Cancel an Action
Ctrl + 1 .....	Single Spacing
Ctrl + 5.....	One and one-half Spacing
Ctrl + 2 .....	Double Spacing

Ctrl + Shift + Spacebar .....	Non-breaking Space
Ctrl + Shift + - .....	Non-breaking Hyphen
Ctrl + P .....	Print
Ctrl + Shift + P .....	Point Size
Ctrl + ] .....	Increase Point Size
Ctrl + [ .....	Decrease Point Size
Ctrl + Shift + F .....	Font
Ctrl + Z .....	Undo
Ctrl + Y .....	Redo
Ctrl + Shift + Z .....	Remove Formatting (plain text)
F7 .....	Spell Check
Shift + F7 .....	Thesaurus
Shift + F3 .....	Change to Upper Case
Ctrl + F6 .....	Switch between Open Documents
Ctrl + T .....	Shift Left Indent and Hanging Indent to next tab
Ctrl + Shift + T .....	Return the Left Indent and Hanging Indent to the previous tab
Ctrl + M .....	Shift the Left Margin to the next tab
Ctrl + Shift + M .....	Return the Left Margin to the previous tab
Shift + Alt + D .....	Insert Date Code
Shift + Alt + T .....	Insert Time



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