

**OTLA LEGAL STAFF CLE**  
**December 3, 2010**

# **Microsoft Word – Tips and Tricks**

Beverly Michaelis  
Practice Management Advisor  
Professional Liability Fund

## Best Blogs and Web Sites for Word Users

[CompuSavvy's Word & WordPerfect Tips](#)

[Legal Tech Trainer](#)

[Allen Wyatt's Word Tips](#)

[Greg Maxey's Microsoft Word Tips](#)

[Girishk's Top 50 Microsoft Word Tips](#)

## Best Books for Word Users

*Creating Labels with Mail Merge in Word 2007* by Jan Berinstein (\$3.75) (ebook)

*Dressing Up Your Word Documents with Styles* by Jan Berinstein (\$7.25) (ebook)

*Formatting Legal Documents with Microsoft Word 2007* by Jan Berinstein (\$35.95)

*Formatting Legal Documents with Microsoft Word 2010* by Jan Berinstein (\$41.95)

*The Lawyer's Guide to Microsoft Word 2007* by Ben Schorr (\$69.95/\$49.95 ABA LPM Member)

Jan's books are available at [Amazon](#) or [Lulu](#). Visit [Jan's blog](#) for discounts or coupons first.

*The Lawyer's Guide to Microsoft Word 2007* is an ABA publication. Oregon lawyers can order ABA publications at a discount through the [Professional Liability Fund Web site](#). From the home page, select ABA Products.

## Best Third Party Software

When it comes to third party software, the [Payne Group](#) is the best, without a doubt. Primarily a resource for training, consulting, project management, and migration, Payne also sells a number of retail products for [Word](#):

Metadata Assistant

Numbering Assistant

Forms Assistant (including Pleading)

Agreement Assistant

Address Assistant

Bates Labeling

File New Assistant

Redaction & Scramble Assistant

Style Assistant

All with features you won't find elsewhere. Payne also offers a few free products that may meet your needs:

Bates Label Assistant

Scramble Assistant

PCG Next (sequential numbering)

If you visit the [Payne Group](#) Web site, take the time to check out the [Word Tips](#) and [Answers to Frequently Asked Questions](#).

## Top Microsoft Resources

[Save as PDF or XPS \(free download\)](#)

[Free Templates](#)

[Word Help and How-Tos](#)

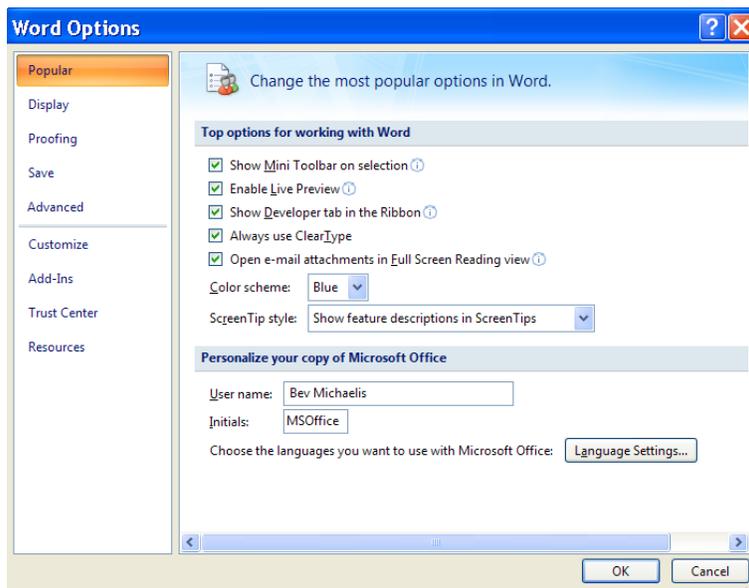
[Training and Tips](#)

[Blogs](#)

## Struggling With Word - Under the Office Button

- Turn Formatting Marks Off (or On): Office Button > Word Options > Display
- Turn Off Auto Correct or Auto Format: Office Button > Word Options > Proofing
- Spell Check and Grammar Check Settings: Office Button > Word Options > Proofing
- Save Options: Office Button > Word Options > Save
  - Save Files in this Format select preferred default: .docx or .doc
  - Auto-Recover: Dial this down to every 1 minute (Default is 10)
  - Default File Location: My Documents or Documents – change as desired
  - Auto Recover File Location – change as desired
- Drag/drop/cut/copy/paste options - Office Button > Word Options > Advanced
  - Scroll down to “Display” and dial up number of Recent Documents
  - Also under “Display” turn on “Show Shortcut Keys in Screen Tips”
- Warn before printing, saving, or sending a document with tracked changes or comments: Office Button > Word Options > Trust Center > Trust Center Settings > Privacy Options > Document-specific settings. Check the box:

Warn before printing, saving or sending a file that contains tracked changes or comments



## Service Packs and Updates

Office Button > Word Options > Resources > Check for Updates

## Struggling With Word - Where is?

Item	Tab in Ribbon
Comments	Review
Envelopes & Labels	Mailings
Font	Home > Font
Font – Default	Home > Font > Default ...
Footnotes and Endnotes	References
Header and Footer	Insert
Index	References
Mail Merge	Mailings
Margins	Page Layout
Margins – Default	Page Layout > Margins > ▾ Custom Margins...
Spelling and Grammar	Review
Table of Authorities	References
Tabs	Home > Paragraph > Tabs...
Tracked Changes	Review

## Struggling With Word - I Want My Classic Word Menu Back!

Give me back my classic menu (Word 2007): <http://tinyurl.com/Classic-Menu-Office-2007>

Give me back my classic menu (Office 2010): <http://tinyurl.com/Classic-Menu-Office-2010>

Customize my ribbon (Word 2007): <http://tinyurl.com/Customize-Ribbon-2007>

## Struggling With Word - My Two Cents – Free Articles by Beverly Michaelis on JD Supra

Auto Update Can Lead to Auto Malpractice: <http://t.co/bHfVr5X>

*Avoid Strife – Strip Out Coding in Word:* <http://t.co/PIBpg0o>

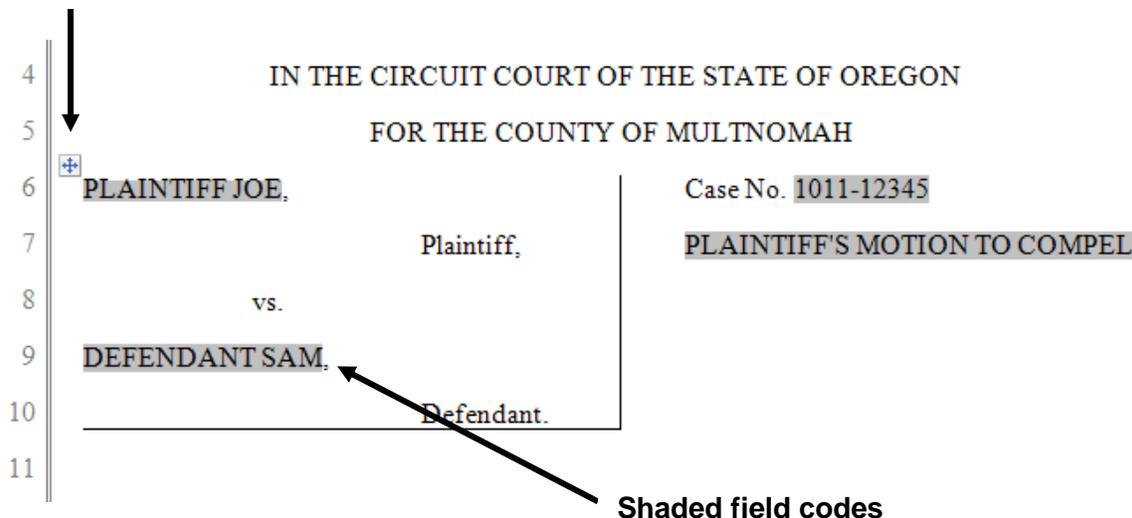
Metadata 101 – What You Don't Know Can Hurt You: <http://t.co/iX5ZTBI>

Tracked Changes in Microsoft Word: <http://t.co/EAvFyoo>

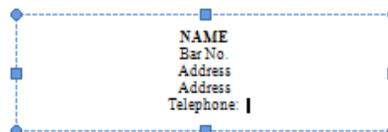
## Struggling With Word - Weird Things are Happening

1. My spacing is off – Check line spacing *and* spacing before and after: Home > Paragraph. Many forms and templates use spacing before and after or exact line spacing (in lieu of single, 1.5, or double). To clean all odd-ball space settings out of your document, Select All using ctrl A, then Home > Paragraph in the ribbon and dial spacing before to 0, spacing after to 0, and line spacing to single (or whatever is desired).
2. I can't seem to manipulate a chunk of text – See if keep with next, keep lines together, or widow/orphan control is on: Home > Paragraph.
3. In a numbered list, the number is bolded, but the text is not. I don't want anything to be bolded – Word formatting characteristics are stored in the paragraph mark. Click Show/Hide ¶ to make the paragraph mark visible, select the ¶ mark and any space before it, then unbold.
4. I'm using a pleading template and I'm having trouble with the caption – Captions in a pleading template are commonly set up in a Table. If this is the case, you'll need to manipulate the caption using Table settings. Click inside the caption, if Table Tools pops up in the top right of your Word screen, you've got a table. To manipulate table cells, click on the Layout tab. Other signs you're working with a table – you'll see the cross-hair symbol or fields may be shaded:

### Table cross-hair



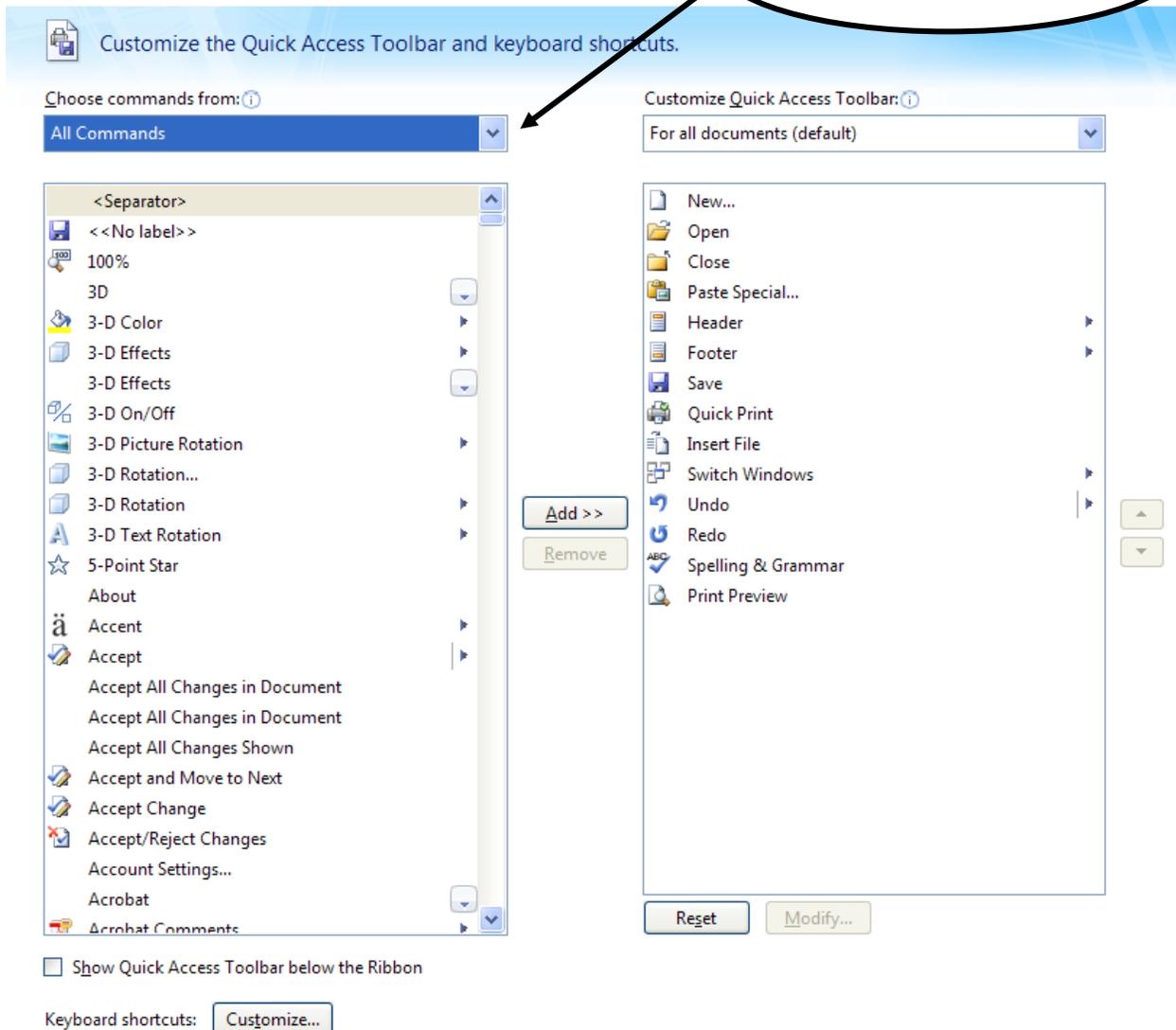
5. When I click on text in my document, blue hash marks appear around it – This is a sign you are working with a text box. Click on the suspect text, Text Box Tools should pop up on the top right of your Word screen. Click on Text Box Tools to manipulate the text or adjust the text box. Here's an example of a text box:



## Customize the Quick Access Toolbar

Office Button > Word Options > Customize

Change to All  
Commands



### Paste Special ...

If you choose "Unformatted Text," this command allows you to paste the contents of your clipboard into your document without formatting. The clipboard contents assume the formatting characteristics of your current document.

### Insert File

This is another way you can bring content into an existing document without the formatting.

### Switch Windows

Exactly what it says. I miss the old "Windows" menu option. This button lets me move quickly between Word documents.