



WSSFC 2025

Technology Track – Session 7

Mastering Word

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About the Presenter...

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Mastering Microsoft Word

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Mastering Microsoft Word

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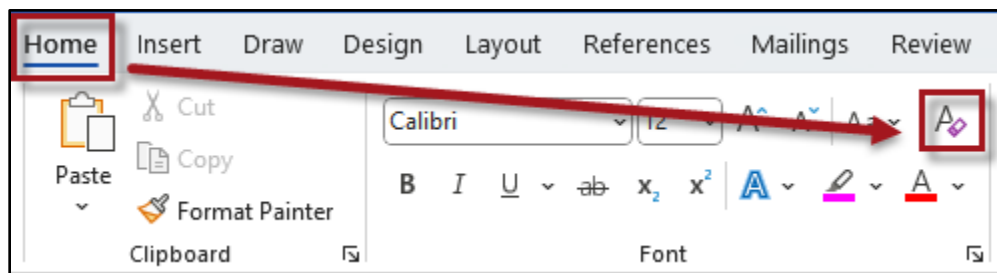
WORD TIPS AND A NOTICE: Microsoft Word is perplexing because what you really need to know in order to control common formatting problems is concealed. Using the program over time does not reveal to you Word's secrets. The following is a program on how to deal with the most common problems Word users face.

If your office is interested in **hands-on, legal-specific Word training** taught by a lawyer either on-site or via webinar, see the attached **Exhibit A** for more information.

ALSO NOTE that it takes 12 hours to cover everything you need to know about Word in a classroom setting. This is a 1 hour class so I'm necessarily cherry-picking topics that tend to generate a lot of tech support issues for users. If you have questions about Word functionality I don't cover, you can always send an email to bhenley@affinityconsulting.com and I'm happy to help. As an aside, we can solve any Word formatting issue in any document, no matter how messed up it may be in the first place.

TIP 1 - IDENTIFY AND CONTROL DOCUMENT DEFAULT FORMATTING

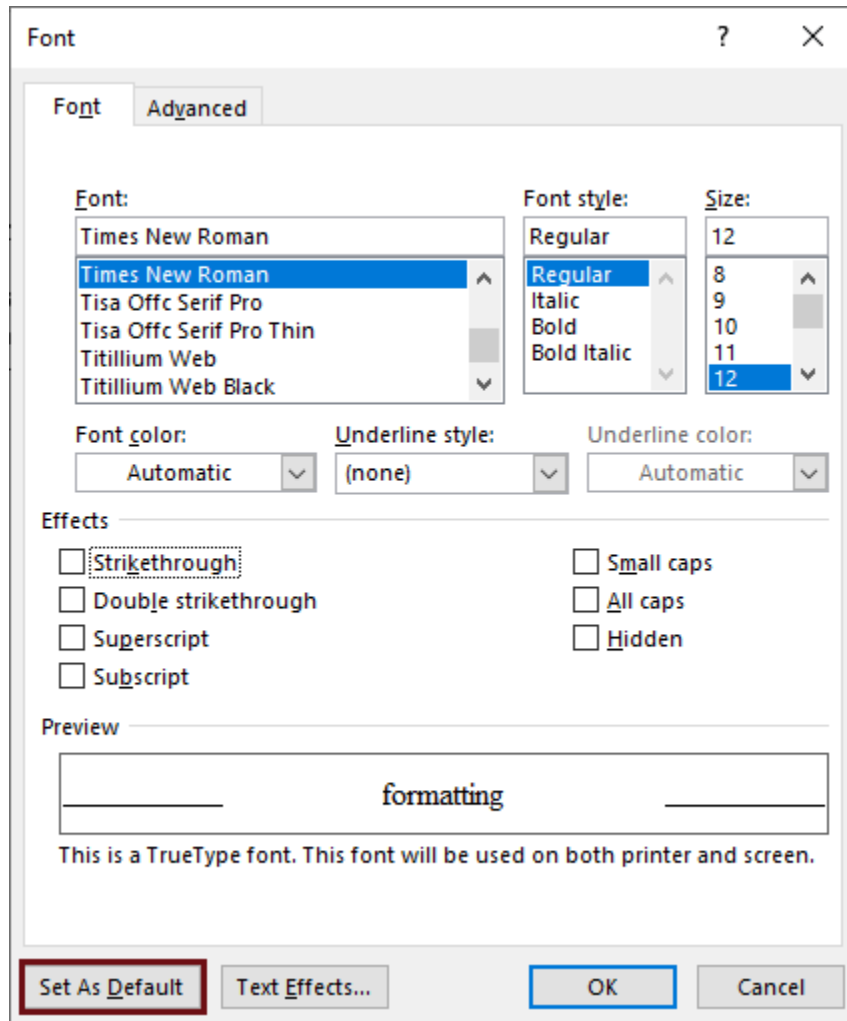
1. **Every Document Has Default Formatting:** If you're editing a Word document and the formatting keeps shifting and changing even though you're not doing it overtly, there's a reason that happens. When a Word document is created, it is given default formatting by the user's computer/version of Word. That default formatting is buried in the document like DNA. Unfortunately, if users don't like the formatting they see in a document, almost all of them will simply select the text, then choose a different font, point size, paragraph alignment, etc. from the ribbon in Word. However, that has no effect on the underlying default; and the underlying default will keep re-asserting itself on your document while you're editing (that's what causes the random format shifting you've probably seen while editing).
2. **How to Identify A Document's Default Formatting:** To identify any particular document's default formatting, simply open it in Word, select any paragraph, and click the Clear All Formatting button on the home ribbon. Whatever you see at that point is the default formatting.



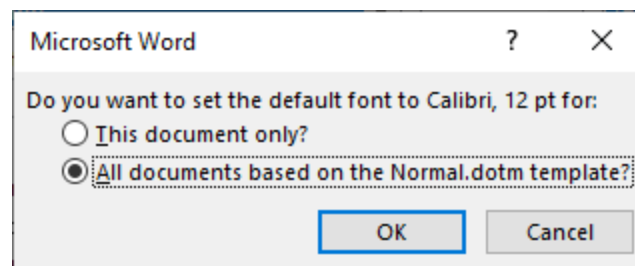
3. **How to Fix a Document's Default Formatting:** If you reveal a document's default formatting and it disagrees with what you want to see in the document, you can fix it. It's a two step process:



- A. **Fix Font Formatting:** Right-click anywhere in your document ⇒ choose **Font** from the menu that appears ⇒ change the formatting to what you would like ⇒ click Set As Default at the bottom of the dialog ⇒ OK.
 - B. **Fix Paragraph Formatting:** Right-click anywhere in your document ⇒ choose **Paragraph** from the menu that appears ⇒ change the formatting to what you would like ⇒ click Set As Default at the bottom of the dialog ⇒ OK.
4. **How to Fix Word's Default Formatting for Blank New Documents:** Word comes with default font, paragraph and section formatting. Much of it is inappropriate for drafting legal documents. So here's how you fix them permanently.
- A. **Change Your Default Font Formatting:** If you don't like Calibri 11 or Word's other defaults related to Fonts, simply follow these steps to fix them:
 - i. Open a blank document in Word
 - ii. Right click anywhere ➔ choose Font. This will make the Font dialog appear.
 - iii. Make your adjustments to the font formatting and click the Set As Default button.



- iv. Make sure you check All documents based on the ... before you click the OK button.



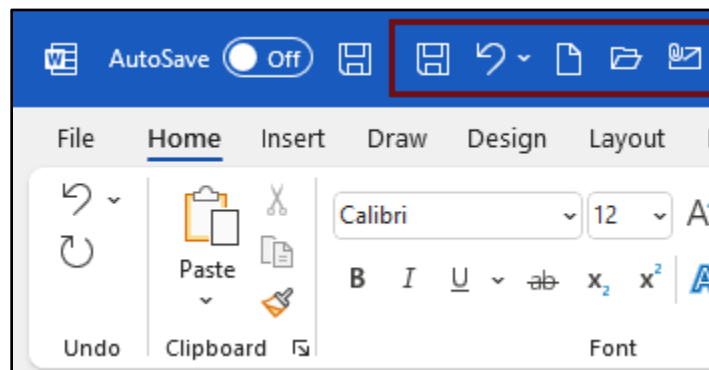
- B. **Change Your Default Paragraph Formatting:** Simply follow these steps to fix them.
 - i. Open a blank document in Word.
 - ii. Right-click anywhere ➔ choose Paragraph from the menu that appears. This will make the Paragraph dialog appear.

- iii. Make your adjustments to the paragraph formatting and click the Set As Default button ➔ tick All documents based on the Normal.dotm template? ➔ OK button.
5. **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.

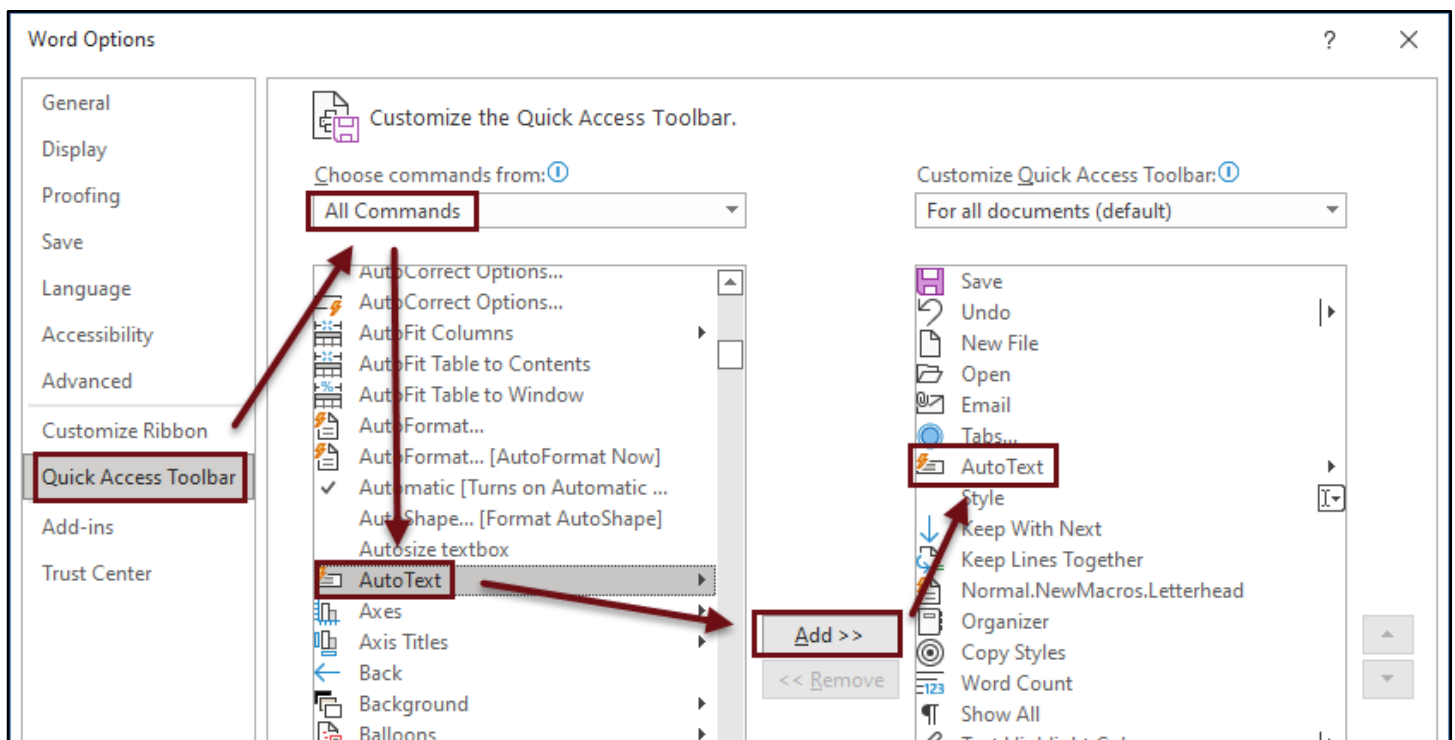
Initially, you might wish that default setting changes would automatically affect your existing documents. However, it would be extremely problematic if that were the case because every time you created a document and formatted it just the way you wanted, it would completely reformat itself as soon as someone else opened it in Word (assuming that their formatting defaults weren't exactly like yours).
6. **Sometimes Its Easier To Nuke the Formatting and Start Over:** If you've got text that is doing some crazy thing you can't figure out, there's always a way to get rid of all formatting and start over.
 - A. **Wipe Out All Font and Paragraph Formatting:** This really means that you strip off any manually applied formatting and take the text back to whatever formatting is the default for the document. Select the text ➔ click Home ribbon ➔ Font group ➔ Clear Formatting button .
 - B. **Strip Font Formatting:** Select the text ➔ Ctrl + Spacebar.
 - C. **Strip Paragraph Formatting:** Select the text ➔ Ctrl + Q.

TIP 2 - FIX WORD'S INTERFACE: There are a couple of things you can do to improve Word's interface.

1. **Quick Access Toolbar - How To Make It Visible If Hidden:** The Quick Access Toolbar ("QAT") is located at the top, left corner of Word's screen if it is visible at all. In Word 21/365, it is hidden by default. To show this valuable toolbar (if it is currently hidden), right click any button on the ribbon ➔ Show Quick Access Toolbar.



2. **Move The QAT Below The Ribbon:** So you can see it better, add color and more buttons to the QAT, it's a good idea to move it off the top of the screen. To do this, simply right-click any button already on the toolbar ➔ Show Quick Access Toolbar Below the Ribbon.
3. **Toggle Button Labels on QAT On or Off:** In Word 21/365, you can turn the button labels on or off. If you can already see the labels, just right click any button on the QAT ➔ Hide Command Labels. If you don't see labels but would like them, right-click any button on the QAT ➔ Show Command Labels.
4. **Add Commands to the QAT:** You can add commands through the Quick Access Toolbar ("QAT") Just right-click any button on the QAT ➔ Customize the Quick Access Toolbar ➔ choose More Commands from the drop-down menu. The menu contains items for the most common commands.



The following are some common options, all of which can be found under the All Commands category (Popular is the default so you'll have to switch it):

- AutoText (it's very important that you add this one)
- 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.
5. **Customize 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. Simply right-click the Status Bar and you'll see the options you can add to it. We recommend adding, at a minimum, Formatted Page Number and Section.

Customize Status Bar		
✓	Formatted Page Number	1
✓	Section	1
✓	Page Number	Page 1 of 1
	Vertical Page Position	1"
	Line Number	1
	Column	1
✓	Word Count	0 words
✓	Spelling and Grammar Check	No Errors
✓	Language	
✓	Signatures	Off
	Information Management Policy	Off
	Permissions	Off
✓	Track Changes	Off
✓	Caps Lock	Off
✓	Overtype	Insert
	Selection Mode	
✓	Macro Recording	Not Recording
✓	Upload Status	
✓	Document Updates Available	No
✓	View Shortcuts	
✓	Zoom Slider	
✓	Zoom	100%

6. **Turn On The Ruler:** As you'll see in later chapters, the ruler is extremely important in Word and unfortunately, it is turned off by default in Word 2007. To turn it on, simply open a blank document, click the View ribbon ➔ check the Ruler box.

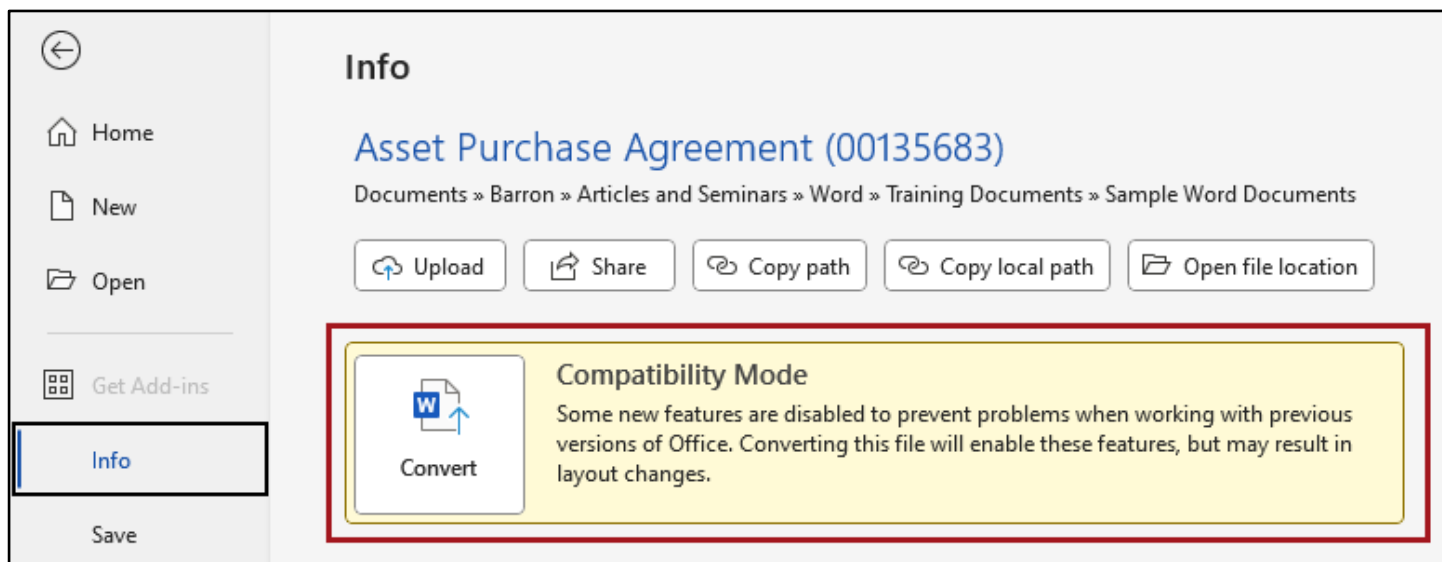
TIP 3 – DON'T WORK WITH .DOC FILES AND DON'T STAY IN COMPATIBILITY MODE: If your office has been using Word for many years, you probably have a few old .doc files floating around. As you know, the new versions of Word create .docx files rather than .doc files. The difference isn't just an extra letter in the suffix. .doc files can hold viruses (.docx files cannot) so they're inherently less safe. They are also susceptible to corruption (which happened fairly often when they were the only file type), they are larger than .docx files, and .docx files play nicer with other compatible applications. More importantly, many of Word's latest features are simply unavailable if you're using a .doc file.

If you see "Compatibility Mode" at the top of your screen, then the document you're working on is either a .doc file or it could be a .docx file that is backward compatible with the problems associated with .doc files. For example, see below as an example of what to look for at the top, left corner of your Word screen:

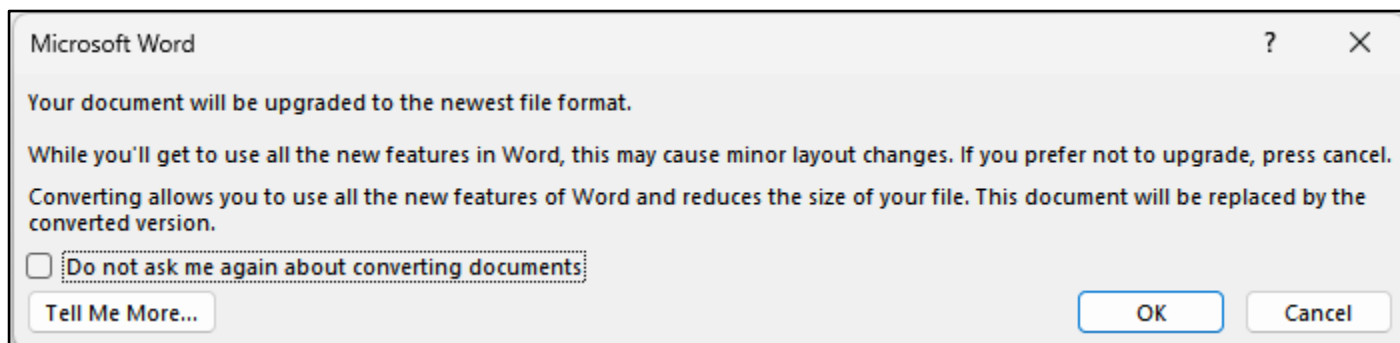


If you need to use an old .doc file as a template and/or you're in Compatibility Mode, here's how you resolve either issue.

1. Open your document in Word.
2. Click the File menu in the left, top corner ➔ Info (left side). Now you'll see this big button at the top of the subsequent dialog:



3. Click the Convert button and you'll see the following. Simply click OK.

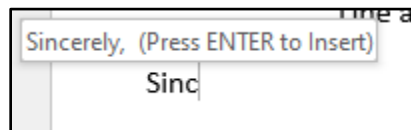


4. Now you'll see that the "Compatibility Mode" message at the top of the screen is gone. If you now save the document, it will also convert it to a .docx file. You'll still have your .doc file, but you'll also have a .docx file with the same prefix/file name.

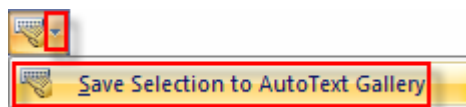
TIP 4 - SET UP YOUR WORD TEMPLATES CORRECTLY: In over 27 years of helping attorneys automate their practices, I've probably *never* received a document from a new client that was set up correctly from a Microsoft Word architectural perspective. In other words, Word was *not* being used for what I can do to expedite drafting. Instead, Word is used as a blunt instrument and everything

that could be automatic is done manually. For example, paragraph numbers are either typed or the drafter tried to use automatic paragraph numbering but set it up all wrong so it doesn't work properly. Cross references to other paragraphs and tables of contents are typed rather than being set up so they automatically update. Word's styles feature is ignored and thus, the formatting is difficult to control. Unfortunately, showing you how to set up a document correctly requires far more than the time we have for this class. However, I want you to see an example of what I'm referring to. If you'd like to see an example document that is set up properly, you can download a sample revocable trust here: <https://bit.ly/3soQxtx> - all you have to do is enter a name and email address to download it. Even if you'd never draft an estate planning document, it's just to show you how a document *could* be set up. After you've downloaded it and opened it in Word, open the styles pane in Word by hitting alt+ctrl+shift+S in Word for Windows or clicking the Styles Pane button in Word for Mac. In Word for Windows, once the styles pane is open, check the box at the bottom that says "Show preview" so you can see what the styles will do to the text. A style is already applied to every paragraph in the document, but you can click on any paragraph, then click on a style and see how they work to reformat the subject paragraph pursuant to the formatting definition contained within the style. This is how Word documents are supposed to work, but not how most people have experienced Word.

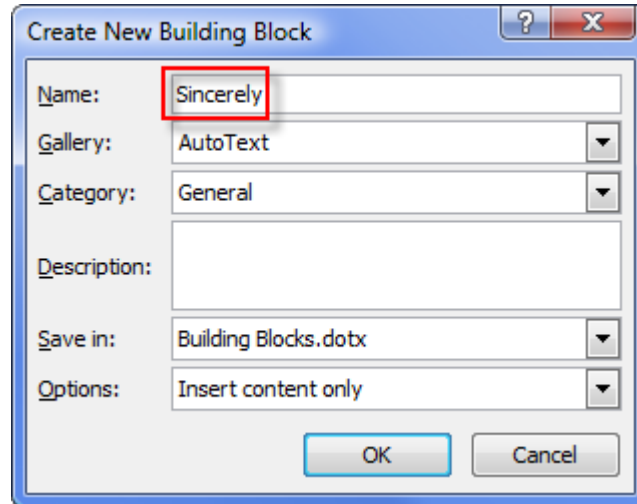
TIP 5 - AUTOTEXT: If you've used Word 2003 or prior versions, then you're probably familiar with this feature. This was a favorite feature for many users of Word 2003 and prior versions. AutoText provided an easy way to insert repetitive blocks of text into your documents quickly (like your signature block). One of the best things about the feature was that if you started typing the name of an AutoText entry, a little window would appear and if you hit Enter, it would simply insert your entry (see example screen shot below).



1. **Add AutoText to the QAT:** You can add AutoText to the Quick Access Toolbar or you can access it by going to the Insert ribbon ➔ Text Group ➔ Quick Parts button arrow ➔ Auto Text. To add it to the QAT, from the Insert ribbon ➔ Quick Parts button ➔ right-click the AutoText button ➔ Add to Quick Access Toolbar.
2. **Create AutoText Entries:**
 - A. Type the text you commonly re-use (or find it in an existing document).
 - B. Select (highlight) the text.
 - C. In the Quick Access Toolbar click the AutoText button arrow ➔ Save Selection to AutoText Gallery or in Word 2010/13/16 click on the Insert ribbon ➔ Text Group ➔ Quick Parts button arrow ➔ Auto Text ➔ Save Selection to AutoText Gallery.

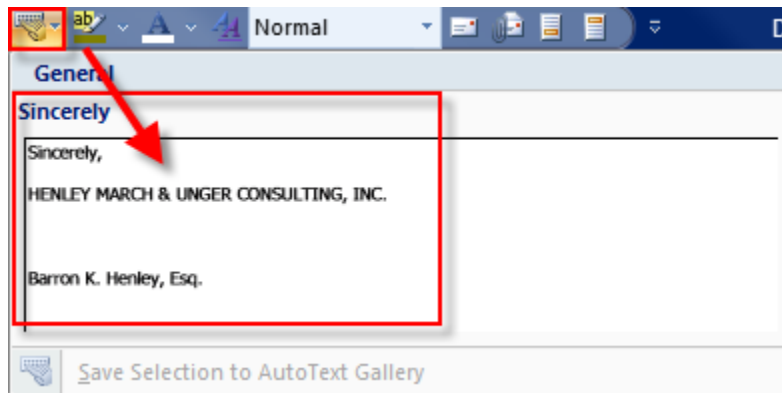


- D. Give the AutoText entry a name and click OK.



3. Insert an AutoText Entry Into Your Document: There are three ways to do this:

- A. Click the AutoText button in the Quick Access Toolbar ➔ select the appropriate AutoText Entry.



- B. In Word 2010/13/16 click the Insert ribbon ➔ Text Group ➔ Quick Parts button arrow ➔ Auto Text ➔ then click the appropriate AutoText entry.

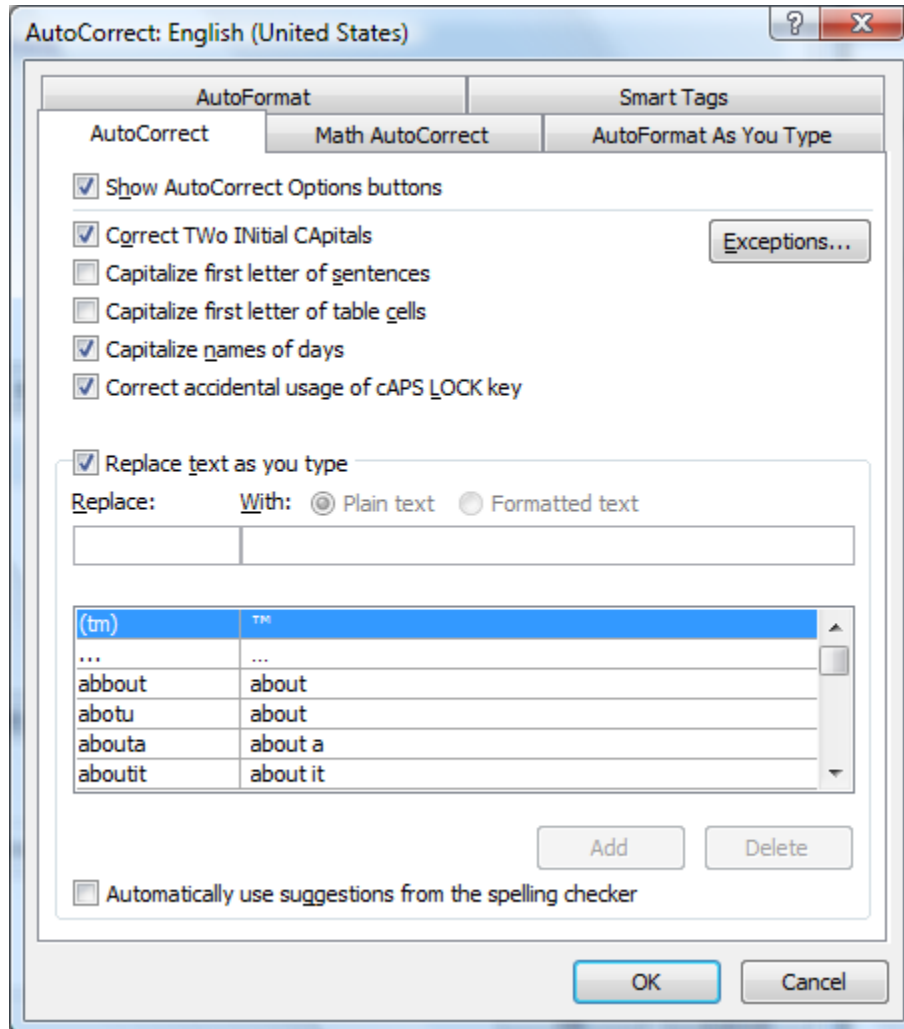
or

- C. Type a few letters of the name of the entry ➔ hit F3.

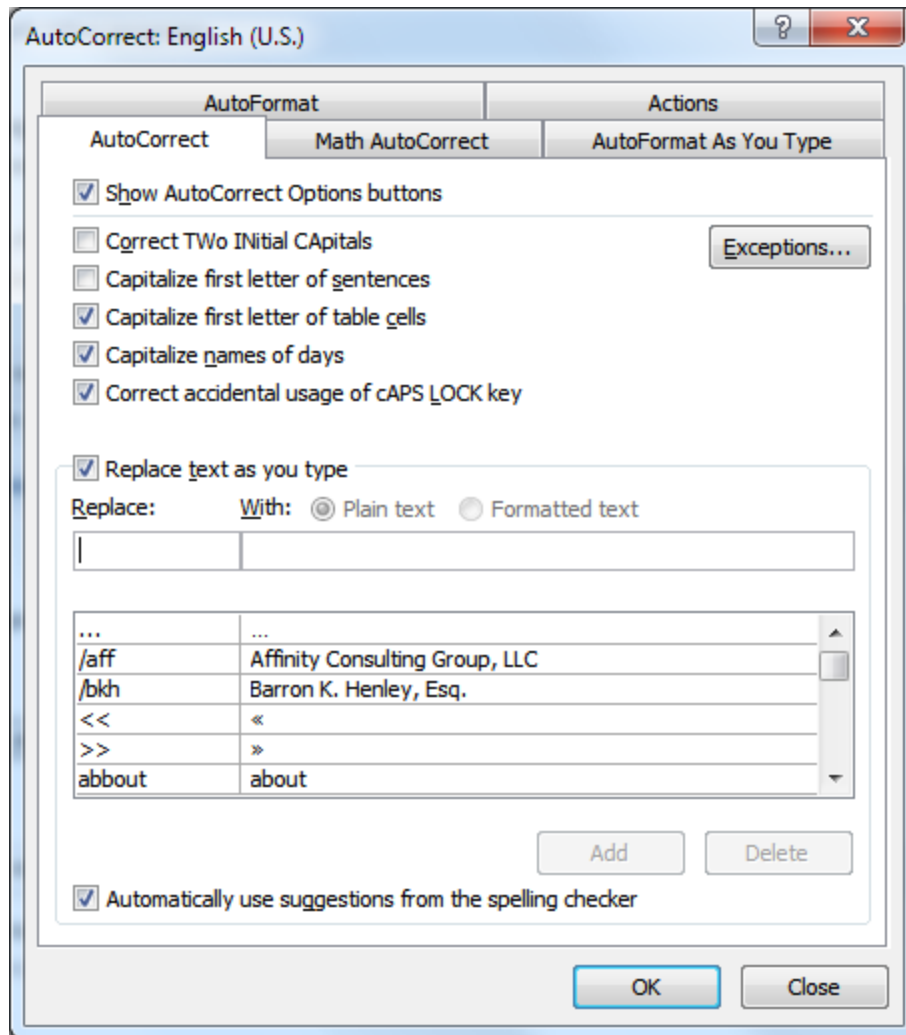
TIP 6 – HOW TO USE AUTOCORRECT PROACTIVELY: Word also uses AutoCorrect to automatically correct commonly misspelled words on the fly and with no intervention on your part.

1. **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:

- A. Click the Office button (Word 2007) or the File menu (Word 2010/13/16) ➔ Options ➔ Proofing ➔ AutoCorrect Options button. The following dialog will appear.



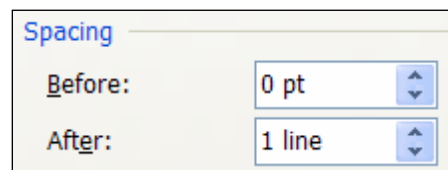
- B. In the Replace box, type the word as you commonly misspell it. In the With box, type the correct spelling of the word.
- C. Click Add and then hit OK.
- D. Test it by typing the word as you commonly misspell it *followed by a space*. The keystrokes should be replaced by the AutoCorrect text.
2. **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, I created an AutoCorrect entry which replaces "/aff" with "Affinity Consulting Group, LLC".



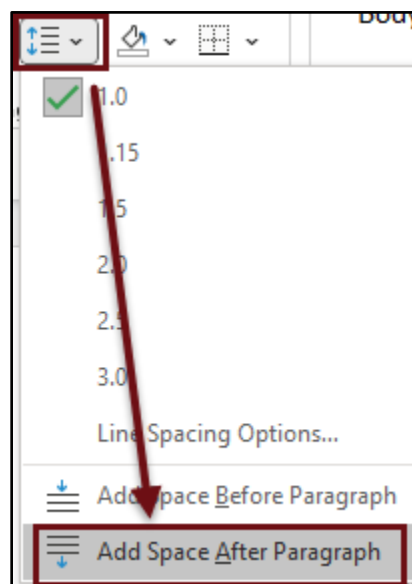
TIP 7 – THE RIGHT WAY TO CREATE VERTICAL SPACE BETWEEN PARAGRAPHS: Many legal documents have single spaced paragraphs with an extra blank line between each paragraph (as this manual is formatted). Using extra hard returns to accomplish this violates two of the aforementioned rules because it is repetitive and annoying and requires more (rather than fewer) keystrokes. Further, it makes it easy to end up with too many lines between paragraphs or not enough. In fact, this is one of the things that Word users routinely look for and fix before printing a document. Word has a feature for creating vertical space between paragraphs automatically. It's fast, requires fewer keystrokes and will never allow you to end up with too much or not enough space between paragraphs.

1. **Accessing Automatic Spacing Settings:** If you want your paragraphs single spaced but you want a double space between each paragraph, the proper approach is to let Word control spacing not only within but, also, between paragraphs. You can get to this setting by either of the following steps:
 - A. Click the Home ribbon ➔ Paragraph launcher ➔ Indents and Spacing tab, or
 - B. Right click your paragraph ➔ Paragraph ➔ Indents and Spacing tab

2. **Spacing Measurements:** Generally, 6 points of space is a half line; 12 points is a full line; 18 points is one and a half lines and 24 points is two lines. More specifically, there are 72 points in a vertical inch so 12 points is actually 1/6 of an inch, not exactly one blank line. However, if you're using a font with 11, 12 or 13 pt size, 1/6" is pretty close to a full blank line. If you are using larger fonts, then you may need to adjust the 12 points up as appropriate.
3. **Spacing Before:** If you would like Word to automatically insert an extra space *above* each paragraph, use Spacing Before. Make the Spacing Before 12 pt. This will add a double space above each single spaced paragraph.
4. **Spacing After:** You can do the same thing as above, but the space will occur *after* each paragraph. Just follow the steps listed for Spacing Before only add the points to Spacing After.
5. **Using Lines Rather Than Points:** If you find the point system confusing, you can always erase the "pt" measure and type "1 line". If you switch from points to lines, the up and down arrows will make adjustments in those terms.

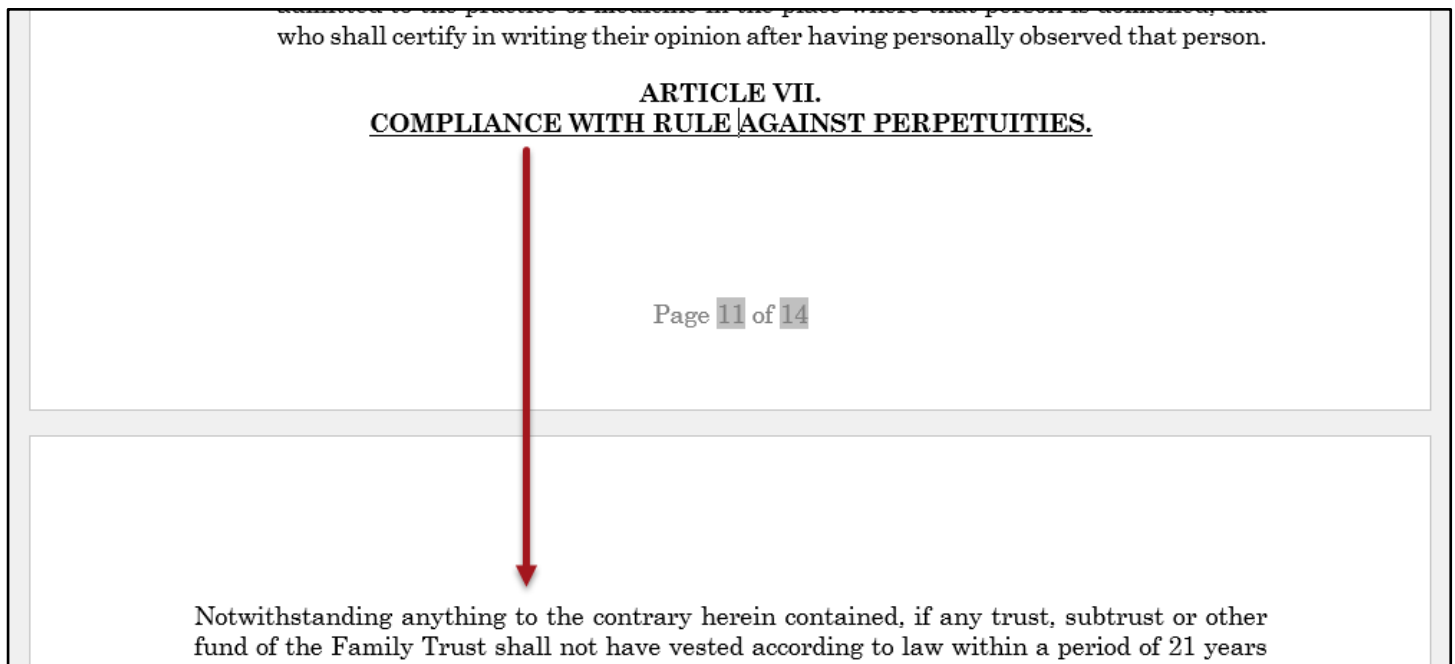


6. **Easiest Way To Apply These Settings:** First, make sure you don't have extra, unnecessary hard returns between your paragraphs. Now select the paragraphs you want to add spacing to → click the Line and Paragraph Spacing button on the home ribbon () → Add Space After Paragraph.

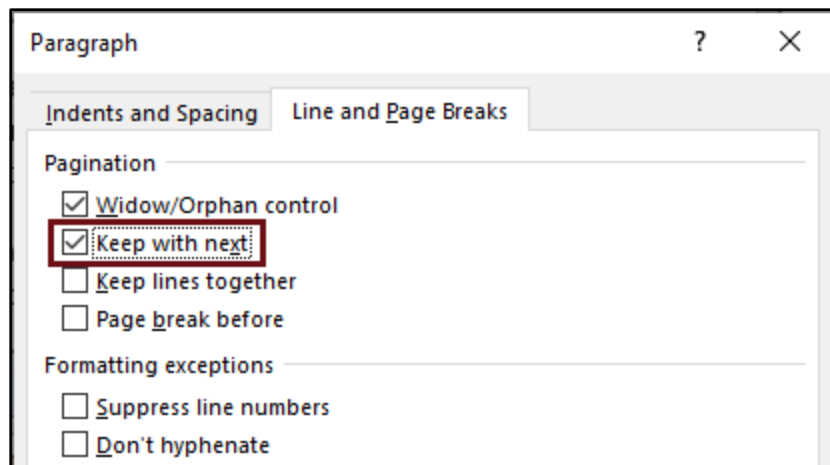


TIP 8 - PARAGRAPH GLUE (AKA KEEP WITH NEXT & KEEP LINES TOGETHER): In other words, if you awkward page breaks in your document, never add hard returns or a page break to get the text on the page you want. All that approach does is create the likely possibility that you're going to end up with too much space between paragraphs as you edit the document. Instead, you'll use a special feature I call paragraph glue which will attach the title to any paragraph that follows it.

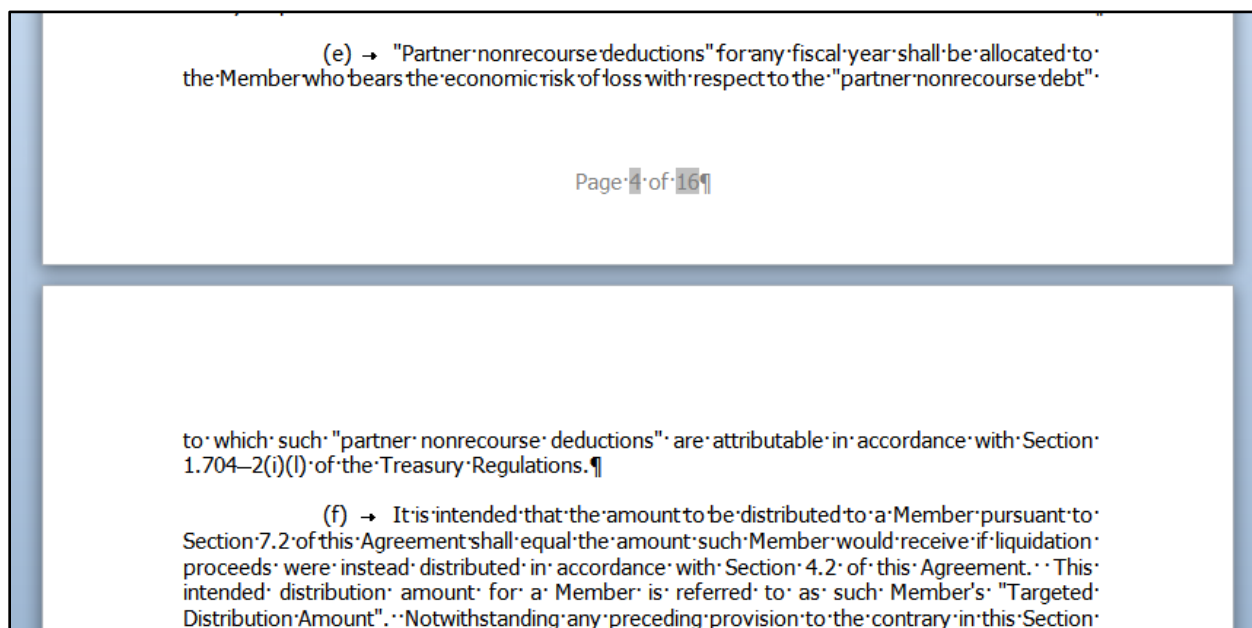
1. **To Keep Paragraphs Together:** This function keeps different paragraphs together on the same page.
 - A. Click your cursor into the paragraph *under which* you want to apply glue. Don't select anything, just click. In the screen shot below, you would simply place your cursor in the paragraph entitled "Loans". You would *not* select paragraphs 3.3 and (a) because that would result in gluing together more paragraphs than you intend.



- B. Either right-click the paragraph and choose Paragraph from the menu that appears - or - click the Home ribbon ➔ Paragraph launcher. Once you're in the Paragraph dialog, click the Line and Page Breaks tab.
 - C. Check the Keep lines together box and the Keep with next box and click OK. Leave the Orphan/Widow box selected.

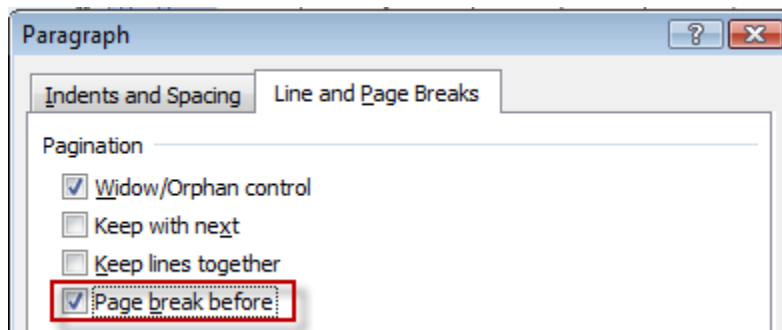


2. **To Keep Text within a Paragraph Together:** This function keeps the lines from a paragraph or paragraphs from being broken by a natural page break. For example, in the screen shot below, I don't necessarily want to glue paragraph (e) to paragraph (f); but I want to keep (e) together on the same page since it's only 3½ lines.



- A. To take care of this issue, place your cursor anywhere in the paragraph in which you'd like to keep the lines together.
 - B. Either right-click the paragraph and choose Paragraph from the menu that appears - or - click the Home ribbon ➔ Paragraph launcher ➔ Line and Page Breaks tab.
 - C. Check the Keep lines together box. Leave the Orphan/Widow box selected.
3. **Automatically Start a Paragraph at the Top of a New Page:** Instead of inserting hard page breaks before paragraphs which you want to begin at the top of a page, use the "page break

before” formatting option (Home ribbon ➔ Paragraph launcher ➔ Line and Page Break tab).

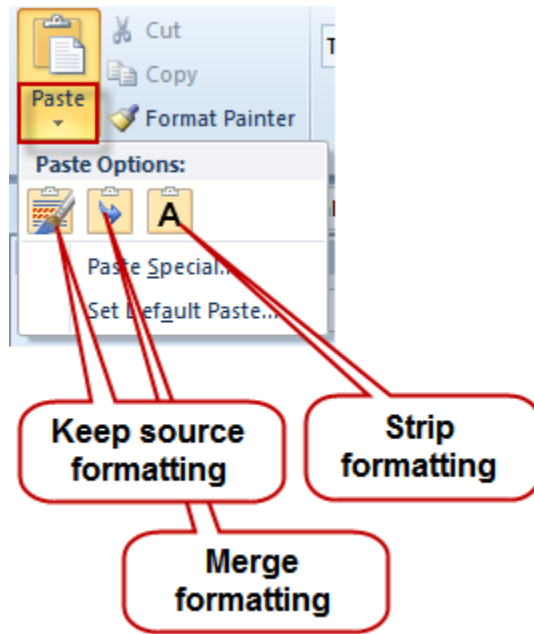


4. **TIP - What To Do If You Experience Bizarre Page Breaks:** Sometimes, if they're applied to too many consecutive paragraphs, Keep with next and Keep lines together can conspire to produce strange page breaks. To visually determine whether this is the source of the problem, click the Home ribbon ➔ Paragraph group ➔ Show/Hide button  and look for **Paragraph Position Marks**. These are black dots which appear in the left margin which indicate that Keep with next or Keep lines together have been applied. You can double-click the dots to quickly access the Line and Page Breaks dialog.

TIP 9 - STRIP THE FORMATTING WHEN PASTING TEXT: If you copy text from one document (or another program) into the document you're editing, you can often bring along with that text formatting attributes that create problems in the document you're editing. Therefore, best practices are to remove all of the formatting when you paste the text. This will allow the text to absorb the formatting of the document you're pasting into. Word make this a pretty easy task.

1. **Basic Copy and Paste:**

- A. Select the text you want to copy.
- B. Click the Home ribbon ➔ Clipboard group ➔ Copy button  (SK: Ctrl + C).
- C. Place your cursor where you want to place the copied text and hit the Home ribbon ➔ Clipboard group ➔ Paste button (SK: 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 in Word 2010/13/16 only:

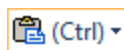


2. To Move (Cut and Paste):

- A. Select the text you want to copy.
- B. Click the Home ribbon → Clipboard group → Cut button  (SK: Ctrl + X).
- C. Place your cursor where you want to place the copied text and click the Home ribbon → Clipboard group → Paste button (SK: Ctrl + V).

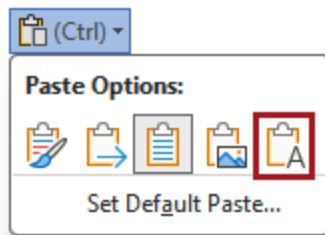
3. Drag and Drop Text Editing: If this feature allows you to select text, place the cursor anywhere in the highlighted area, hold down on the left mouse button and drag the text to another location (or program).

4. Paste Options Button: The Paste Options button appears just below your pasted selection after you paste text.

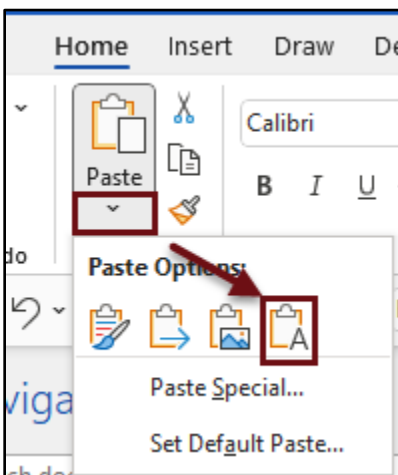


When you click the button, a list appears that lets you determine how the information is pasted into your document. The available options depend on the type of content you are pasting, the program you are pasting from, and the format of the destination document.

5. Strip Formatting After You Paste: Many Word users have struggled with formatting glitches that arise when one pastes text from one document into another which contains different formatting. The Paste Options button addresses this by giving the user the option to keep the source formatting, match the destination formatting or strip the formatting (Keep Text Only).



6. **Strip Formatting When You Paste:** If you've ever copied the text from a case or statute you've found on-line (Lexis, Westlaw, Fastcase, etc.) 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":
- A. Select and copy the text you want from an Internet web page or any other program;
 - B. Open the document in Word (or WordPerfect) into which you want to paste the text;
 - C. Click the Home ribbon ➔ Clipboard group ➔ bottom half of the Paste button ➔ the  button. 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.



TIP 10 - THE FORMAT PAINTER CAN SAVE YOU

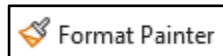
If you find text formatted the way you like in a document, you can easily replicate it elsewhere using the Home ribbon ➔ Clipboard group ➔ Format Painter button . This is particularly useful when you have some rogue paragraphs which are formatted incorrectly. To use this feature, follow these steps:



1. Click anywhere 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.

- | | |
|----|---|
| 3. | <u>Non-Use of Confidential Information.</u> Recipient shall not use any Confidential Information for any purpose whatsoever other than for the Permitted Purpose, and shall not communicate or disclose that the Company has provided Confidential Information except in accordance with this Agreement. |
| 4. | <u>Enforcement.</u> Each of the Company and Recipient agree that a breach of this Agreement will give rise to irreparable injury to the Company for which damages may not be adequate compensation, and consequently, that the Company shall be entitled, in addition to all other remedies available to it at law or in equity, to injunctive and other equitable relief to prevent a breach of this Agreement and to secure the specific performance of this Agreement without the necessity of posting bond (to the extent enforceable under applicable law) or proving lack of adequate remedy at law, and without limitation of other remedies available to the Company at law or in equity. |

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. Apply the same formatting to other text by selecting the text you want to reformat (left-clicking, holding down the left mouse button and dragging the mouse pointer over the text - i.e., select the entire paragraph). Make sure you include the hard return at the end of the target paragraph. In the example referenced above, select paragraph 3. Now it looks like this:

- | | |
|----|---|
| 3. | <u>Non-Use of Confidential Information</u> Recipient shall not use any Confidential Information for any purpose whatsoever other than for the Permitted Purpose, and shall not communicate or disclose that the Company has provided Confidential Information except in accordance with this Agreement. |
| 4. | <u>Enforcement.</u> Each of the Company and Recipient agree that a breach of this Agreement will give rise to irreparable injury to the Company for which damages may not be adequate compensation, and consequently, that the Company shall be entitled, in addition to all other remedies available to it at law or in equity, to injunctive and other equitable relief to prevent a breach of this Agreement and to secure the specific performance of this Agreement without the necessity of posting bond (to the extent enforceable under applicable law) or proving lack of adequate remedy at law, and without limitation of other remedies available to the Company at law or in equity. |

After you release the mouse button, the Format Painter automatically turns off. 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.

TIP 11 - TIPS FOR INDENTS:

1. Types of Indents: There are several kinds of indents.

A. 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. First line indents are most common in letters, memos, and pleadings.

B. 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. This sentence, and the remaining sentences are indented by highlighting this portion of the text, grabbing hanging indent tab on the ruler and dragging it over to the desired position.

C. Left Indent:

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

D. Right Indent:

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

E. Dual Indent:

This paragraph is an example of a dual indent. This indent is very commonly used for quotes in pleadings, articles, and briefs.

2. Indent Using Keystrokes: Click anywhere inside the paragraph or highlight all the desired paragraph(s). Note, there are only speed keys for left and hanging indents.

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

3. Indent with the Paragraph Dialog Box: This will allow you to create any kind of indent.

- A. Right-click anywhere inside the paragraph or highlight all the desired paragraph(s).
- B. Choose Paragraph from the resulting menu ➔ click the Indents and Spacing tab.



- C. Select the desired Alignment, 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).

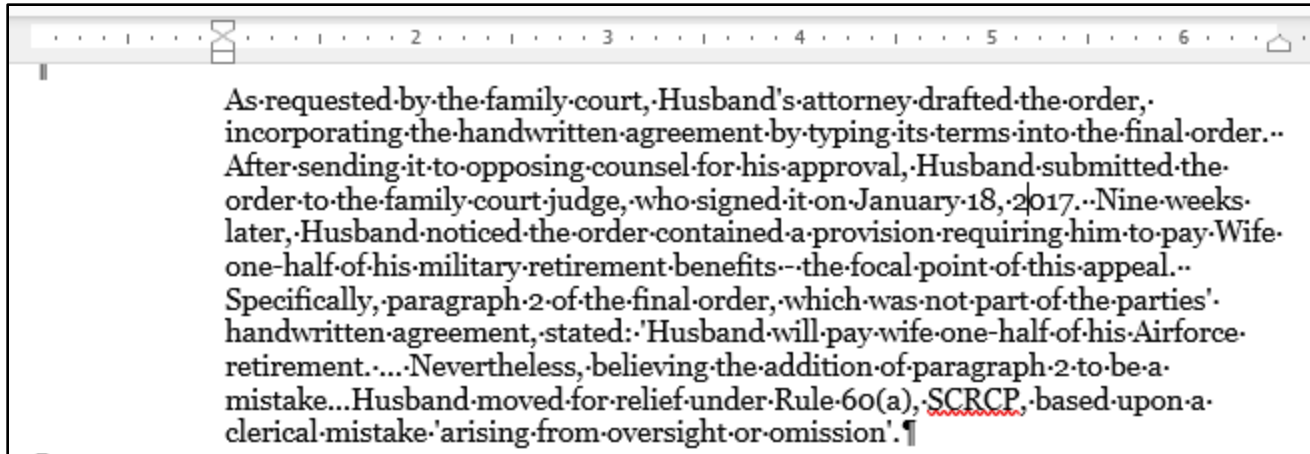
4. When Indents Are Appropriate: Please don't do this:

→ → As-requested-by-the-family-court, Husband's attorney drafted the order, → →
→ → incorporating the handwritten agreement by typing its terms into the final order..
→ → After sending it to opposing counsel for his approval, Husband submitted the →
→ order to the family court judge, who signed it on January 18, 2017. Nine weeks →
→ later, Husband noticed the order contained a provision requiring him to pay Wife
→ → one-half of his military retirement benefits--the focal point of this appeal..
→ → Specifically, paragraph 2 of the final order, which was not part of the parties' →
→ handwritten agreement, stated: 'Husband will pay wife one-half of his Airforce →
→ retirement.... Nevertheless, believing the addition of paragraph 2 to be a → →
→ → mistake... Husband moved for relief under Rule 60(a), SCRCP, based upon a →
→ → clerical mistake' arising from oversight or omission'. ¶

If you edit the foregoing, you'll end up with the following because it is set up incorrectly.

→ → As-requested-by-the-family-court, Husband's attorney drafted the order, → →
→ → incorporating the handwritten agreement by typing its terms into the final order..
→ → After sending it to opposing counsel for his approval, Husband submitted the →
→ order to the family court judge, who signed it on January 18, 2017. Nine weeks →
→ later, Husband noticed the order contained a provision requiring him to pay Wife
→ → one-half of his military retirement benefits--the focal point of this appeal since
Husband was unaware of this provision. → → → Specifically, paragraph 2 of the final
order, which was not part of the parties' → → → handwritten agreement, stated:
'Husband will pay wife one-half of his Airforce → → → retirement.... Nevertheless,
believing the addition of paragraph 2 to be a → → → → mistake... Husband
moved for relief under Rule 60(a), SCRCP, based upon a → → → clerical mistake
'arising from oversight or omission'. ¶

Instead of 32 tabs, this paragraph needed only 1 left indent of 1". That would have been 31 fewer keystrokes AND you would be able to edit the paragraph without any of the foregoing glitches.



TIP 12 - SECTION BREAKS ARE REQUIRED TO CONTROL PAGE NUMBERING: If you want to control page numbering, get it to start over at 1 or turn it off in the middle of the document, or you want to switch from Romanettes (i) to Arabic (1), you must understand how to use section breaks.

1. Our Advice on Page Numbering:

- A. **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.
- B. **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 firm's 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 firm 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.

2. Page Numbers Manually Inserted into a Header or Footer:

- A. Click the Insert ribbon ➔ Header & Footer group ➔ Footer button ➔ Edit Footer.
- B. Put your cursor where you'd like the page number in the header/footer ➔ click on the Header & Footer Tools ribbon ➔ Header & Footer group ➔ Page Number button ➔ Current Position ➔ Plain Number.
- C. Click the Header & Footer Tools ribbon ➔ Close group ➔ Close Header and Footer button to close the Header/Footer ribbon and revise the body of your document.

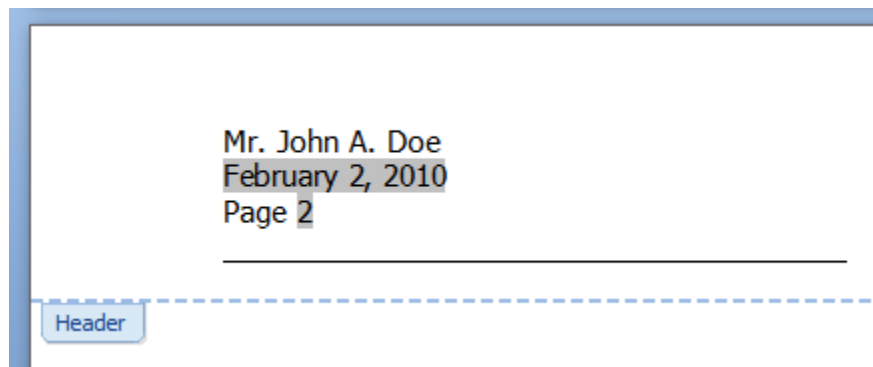


Follow the foregoing steps every single time and you'll have no problems with page numbering.

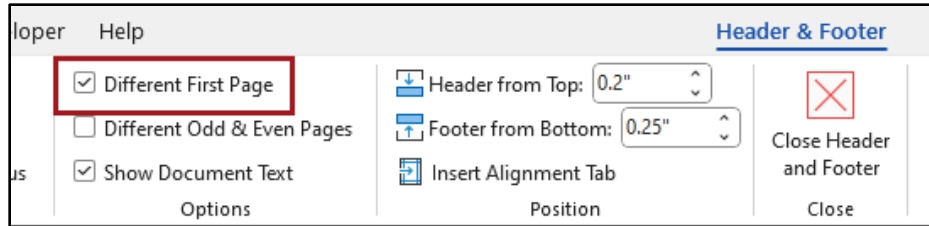
3. **Insert the Total Number of Pages in the Document:** To insert the total number of pages in the document when you are editing a headnote or footnote (Insert ribbon ➔ Header & Footer group ➔ Footer button ➔ Edit Footer), click on the Header & Footer tools ribbon ➔ Insert group ➔ Quick Parts button ➔ 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.

4. **Number All Pages Except The First:**

- A. **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:



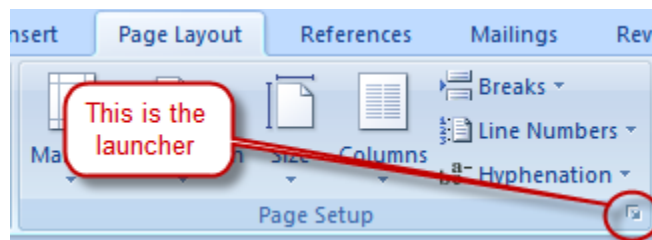
- B. **How To Set It Up:** This is most easily illustrated with an example. Assume you have a 3 page document and you'd like to number pages 2 and 3 only. Simply follow these steps:
 - i. Open the document in Word that you want to page number.
 - ii. Click the Insert ribbon ➔ Header & Footer group ➔ Footer button ➔ Edit Footer. Click the Home ribbon ➔ Paragraph group ➔ Center button (SK: Ctrl + E) to center your cursor in the footer.
 - iii. In Header & Footer Tools 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).
 - iv. 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.



- v. The foregoing step will *remove* the page number from page 1 but leave it on all subsequent pages.
- vi. Click the Header & Footer Tools Ribbon ➔ Close group ➔ Close Header and Footer button and you're done!

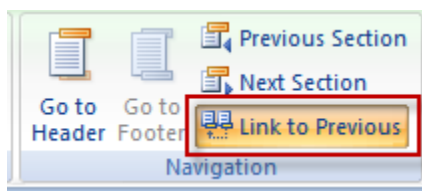
5. Create Page Numbering within Multi-Section Documents:

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



- ii. **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: Page Layout ribbon ➔ Page Setup group ➔ Breaks button ➔ select the type of break you would like to insert.
- iii. **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:

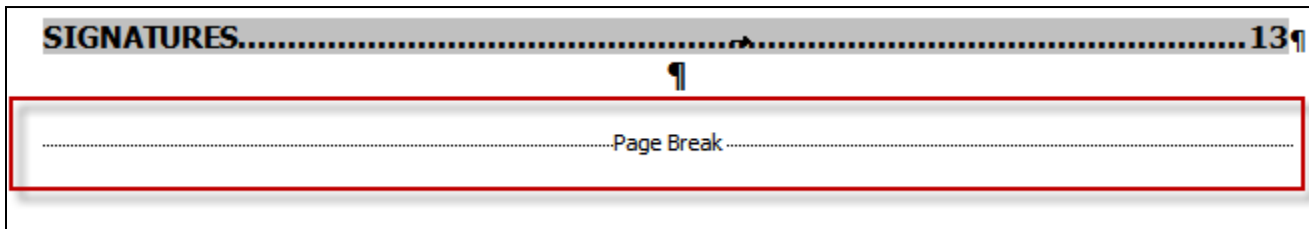
- iv. **Same as Previous Is Evil Rule:** If you see the Same as Previous label, then the header or footer you're looking at is LINKED to the one in the previous section. That means that if you modify it while it's linked, it will change the header/footer in the previous section. Therefore, you'll almost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



- v. **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.
- vi. **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.
6. **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:

- A. 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.

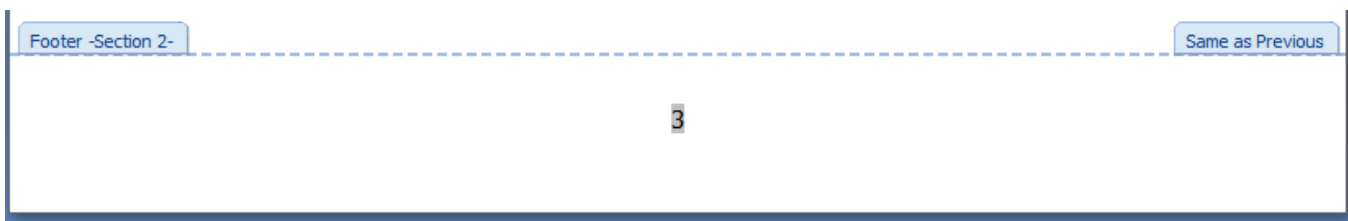


- B. Place your cursor immediately to the left of the page break line and hit the **Delete** key on your keyboard. Now you'll see the title of the body of the document, "PHYSICIAN RECRUITMENT AGREEMENT," appears immediately to the right of your cursor.
- C. Leave your cursor where it is, then click Page 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.
- D. 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.
- E. 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 Tools 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-**.
- F. 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

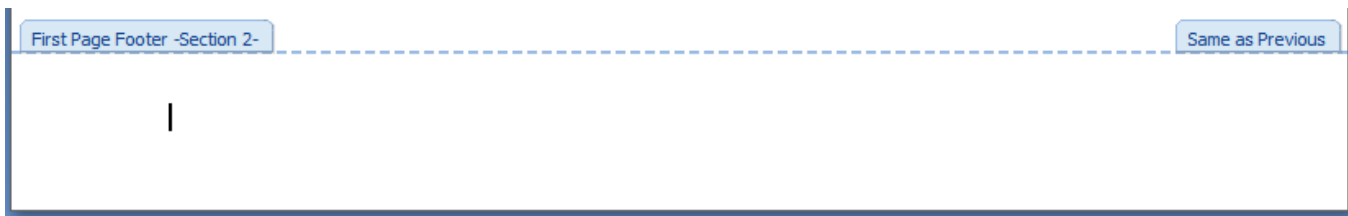


click the Page Number button on the Header & Footer Tools ribbon ➔ Current Position ➔ Plain Number. Now center it by hitting **Ctrl + E**.

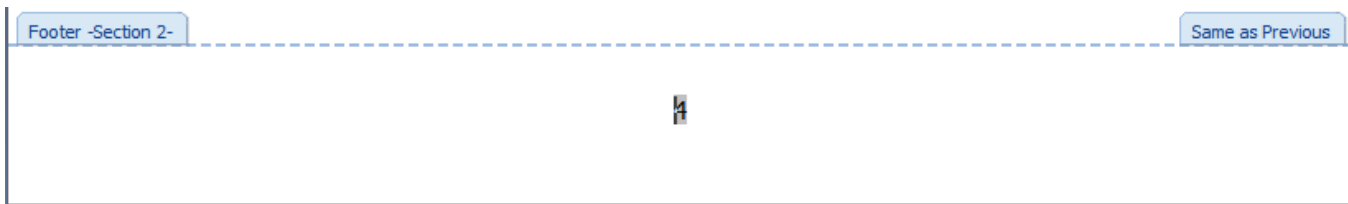
- G. To switch the number from Arabic to small Roman Numerals (i, ii, iii...), click the Header & Footer Tools ribbon ➔ Page Number button ➔ Format Page Numbers and switch to small Roman Numerals with the drop down menu adjacent to **Number format**.
- H. Scroll down to page 2 and you should see that there is a "ii" in the footer of that page. Section 1 is done.
- I. 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:



- J. 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 Tools 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.

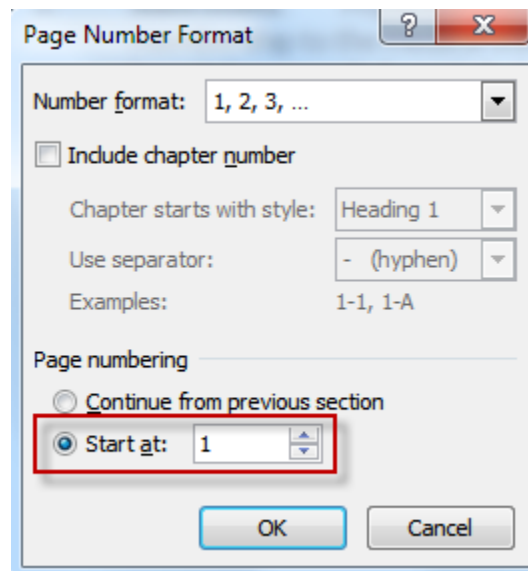


- K. Now scroll down to the footer on physical page 4. Again, this is not at all what we want because it should say **Page 2 of 11**, not **4**.



- L. 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.

- M. 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 Tools ribbon ➔ click the Link To Previous button (to turn it off). The "Same as Previous" label should disappear.
- N. 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 Tools ribbon ➔ Page Number button ➔ Format Page Numbers ➔ click Start at, then OK.

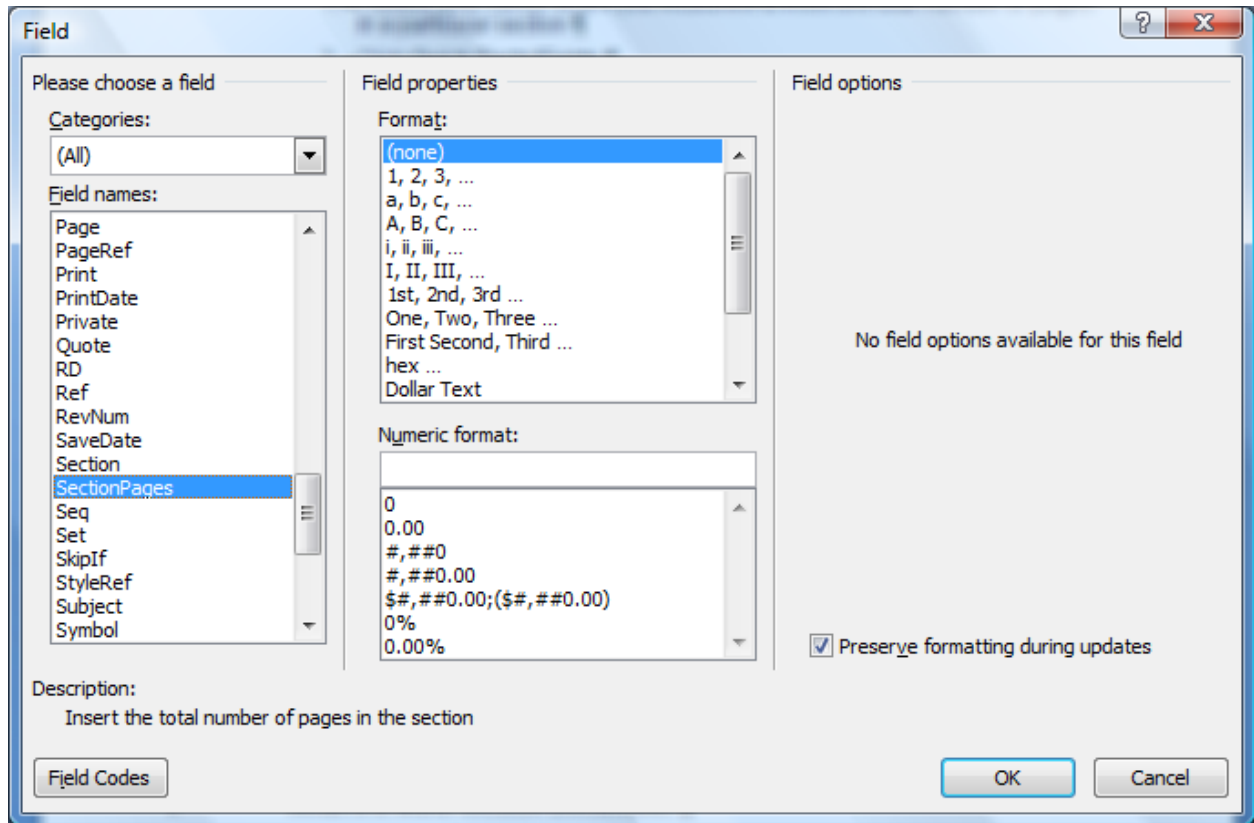


- O. After you click **OK** in the previous step, you need to revisit the **Always Read The Labels Rule**. It looks as if your page number disappeared, but actually, Word jumped you back up to the footer at the bottom of page 3 and you were previously in the footer at the bottom of page 4. Don't be alarmed, just scroll back down to the bottom of page 4 and you should see that the page number has changed from 4 to 2.
- P. 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:

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

7. 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:

- A. Position your cursor where you would like to insert the total number of pages in a particular section.
- B. Click Insert ribbon ➔ Text group ➔ Quick Parts button ➔ Fields.
- C. Under Field names, choose SectionPages, format the Field properties as you would like and click OK.



Field

Please choose a field

Categories:
(All)

Field names:
Page
PageRef
Print
PrintDate
Private
Quote
RD
Ref
RevNum
SaveDate
Section
SectionPages
Seq
Set
SkipIf
StyleRef
Subject
Symbol

Description:
Insert the total number of pages in the section

Field properties

Format:
(none)
1, 2, 3, ...
a, b, c, ...
A, B, C, ...
i, ii, iii, ...
I, II, III, ...
1st, 2nd, 3rd ...
One, Two, Three ...
First Second, Third ...
hex ...
Dollar Text

Numeric format:
0
0.00
#,##0
#,##0.00
\$#,##0.00;(\$#,##0.00)
0%
0.00%

Field options
No field options available for this field

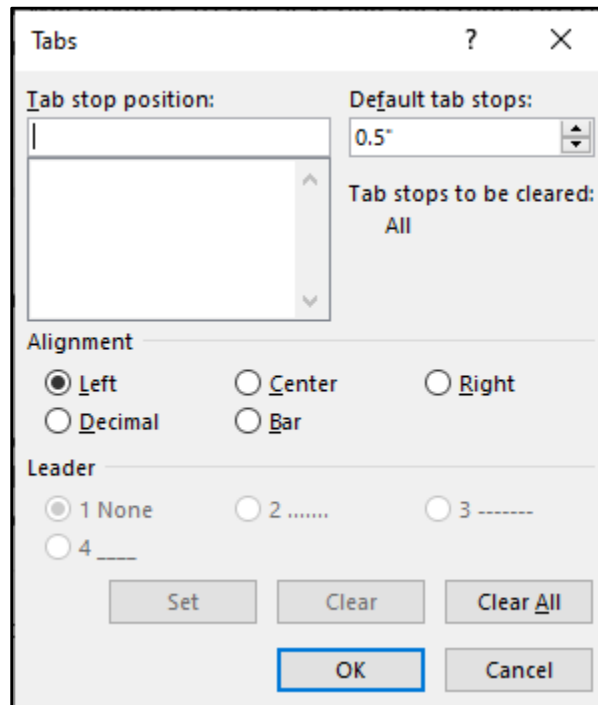
☒ Preserve formatting during updates

Field Codes OK Cancel

TIP 13 - TIPS FOR TABS: By default, Word's tab stops are set every one-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. The default tab stops are Left tabs (described below).

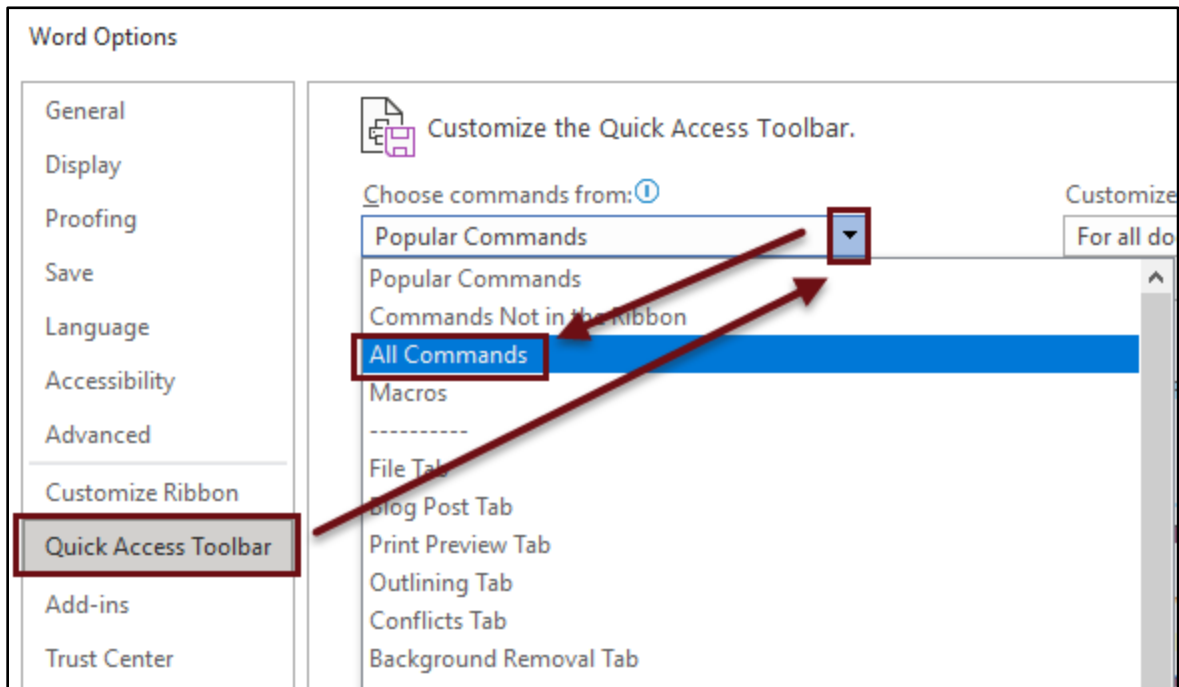
1. **Easiest Way To Set Tabs:**

- A. Select the text/paragraphs for which you want to set custom tab stops → right-click what you selected → choose Paragraph from the right-click menu → Tabs... button in the dialog.
- B. In this dialog, you can change the Default tab stops, clear all tabs currently set, *and* set any custom tabs you want.
- C. Click OK when finished.

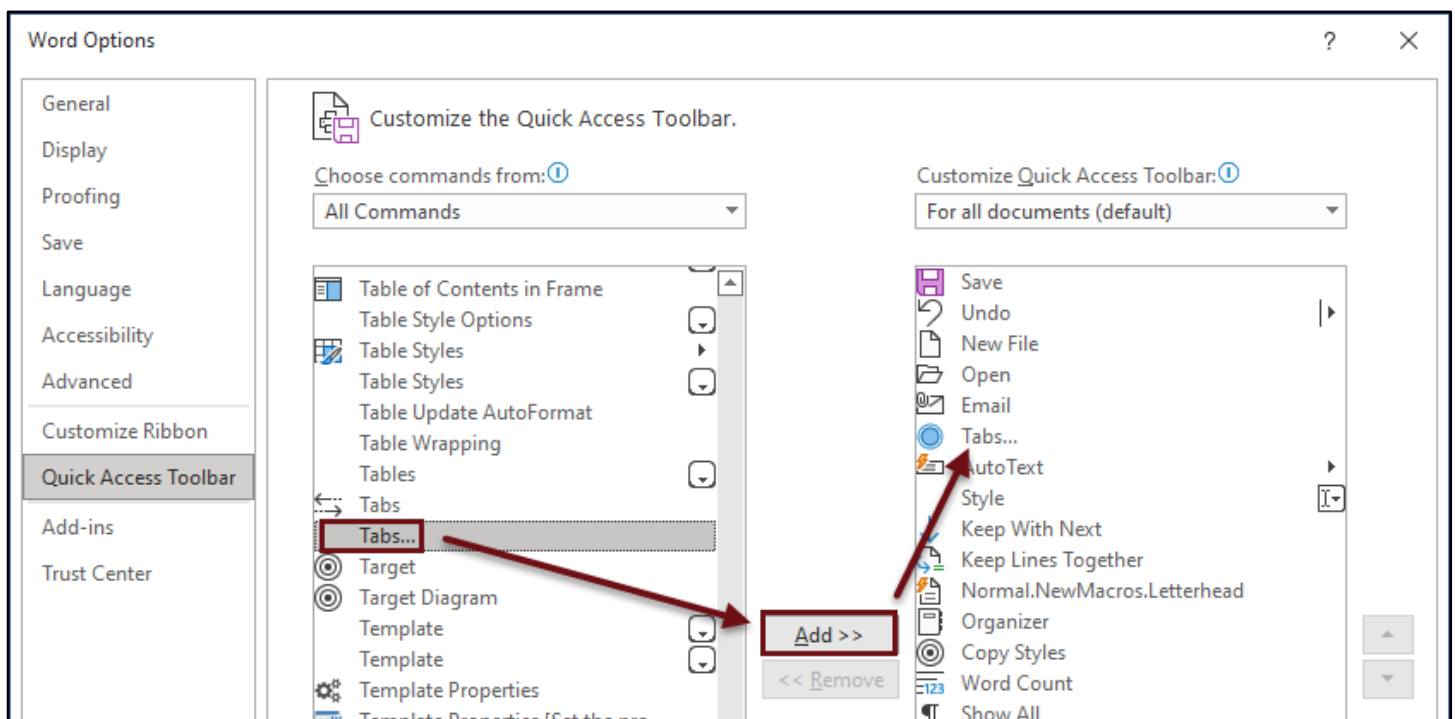


- D. You can also add the Tabs button to the Quick Access Toolbar in Word for faster access (which we highly recommend). To do that, click the File menu → Options →

Quick Access Toolbar ➔ switch from Popular Commands in the middle to All Command.



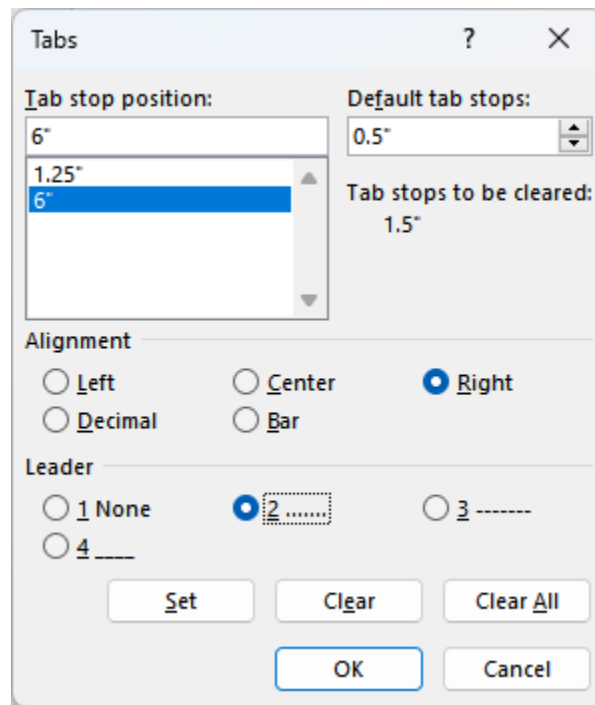
Now scroll down the list of commands until you see Tabs... ➔ click on the button ➔ click the Add button in the middle ➔ OK.



2. **Types of Tabs:** Word has five types of tab stops: Left, Center, Right, Decimal and Bar. These tab stops are easily inserted into a document by clicking on the Tab Alignment Box

and clicking on the Horizontal Ruler. If you do not see the horizontal ruler, click the View ribbon ➔ Show/hide group (Word 2007) Show group (Word 2010/13/16) ➔ check the Ruler box.

- A. **Left tab (L):** Text entered after this tab is left aligned.
 - B. **Center tab (C):** Text entered after this tab is centered.
 - C. **Right tab (R):** Text entered after this tab is right aligned.
 - D. **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).
 - E. **Bar tab (B):** Inserts a vertical line into the document.
3. **Tab Leaders:** Tab Leaders fill the empty space before tab stops with dots, dashes or underscores. For an example, follow these steps:
- A. Right click your paragraph ➔ choose Paragraph from the menu that appears ➔ Tabs.. button. Add a RIGHT tab at 6" and click the #2 dot leader.



- B. Now type "Chapter 1", hit the Tab key, then type "13" so it looks like this:

Chapter 1..... 13

- C. As you can see, the tab leader filled in the blank between "Chapter 1" and the page number, 13.



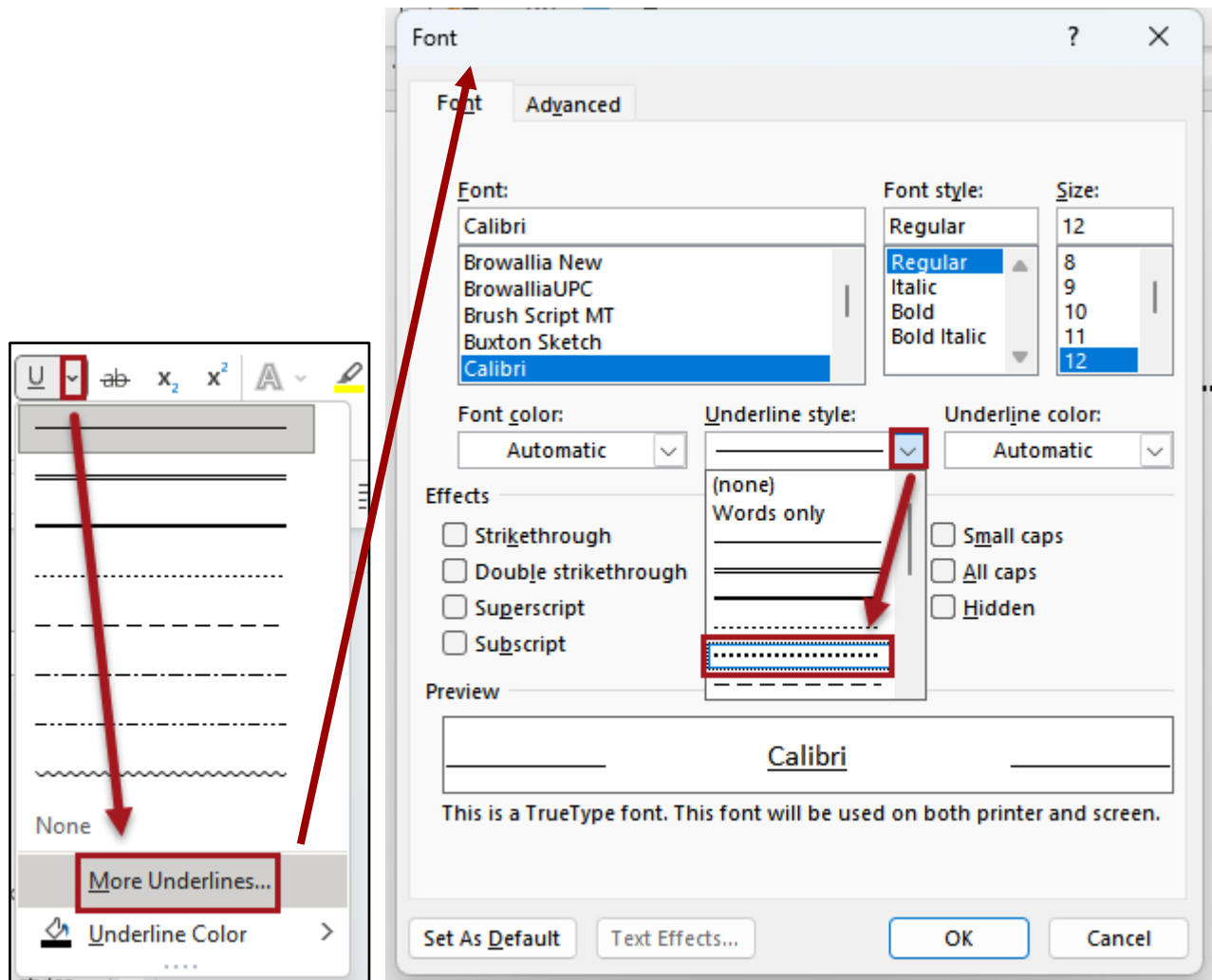
4. **Solid Signature Lines:** You should use tab stops to create signature lines in your documents. For an example, follow these steps:
- A. Set your left and right page margins at 1 inch (Page Layout ribbon ➔ Page Setup group ➔ Margins) or 2.54 cm.
 - B. Click Home ribbon ➔ Paragraph launcher ➔ Tabs... button.
 - C. Set a left tab stop at 3 inches/7.62 cm, 3.5 inches/8.89 cm, and 6.5 inches/16.51 cm with NO leader.
 - D. Click OK.
 - E. Now turn on Underline by clicking the Home ribbon ➔ Font group ➔ Underline button (SK: Ctrl + U), hit a tab key; turn off Underline by clicking on the Underline button again (SK: Ctrl + U) and hit another tab key; turn on Underline again and hit another tab key. Hit Enter twice, then another tab key. You should have perfect witness and signature lines as shown below:



5. **Dotted Signature Lines:** If you want to create the foregoing with dotted lines, follow all of the steps until you get to paragraph 4.E. above. Before turning on the underline button, hit the down arrow to the right of the underline button ➔ choose More Underlines... at the bottom ➔ click the Underline style down arrow ➔ choose the dots ➔ OK. Now hit a tab key, turn off the underline button, hit another tab key, turn on the underline button, and hit another tab key.

See the screenshots below for reference, and the lines should look like this:





TIP 14 - NEVER TYPE A PARAGRAPH NUMBER: If you have numbered, lettered or bulleted paragraphs, you should never type or otherwise manually enter the numbers/letters/bullets. The ability to do this automatically is one of the primary benefits of having a word processor in the first place. There are many ways to do this, but I'm only going to show you the best way to handle this below.

1. **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.

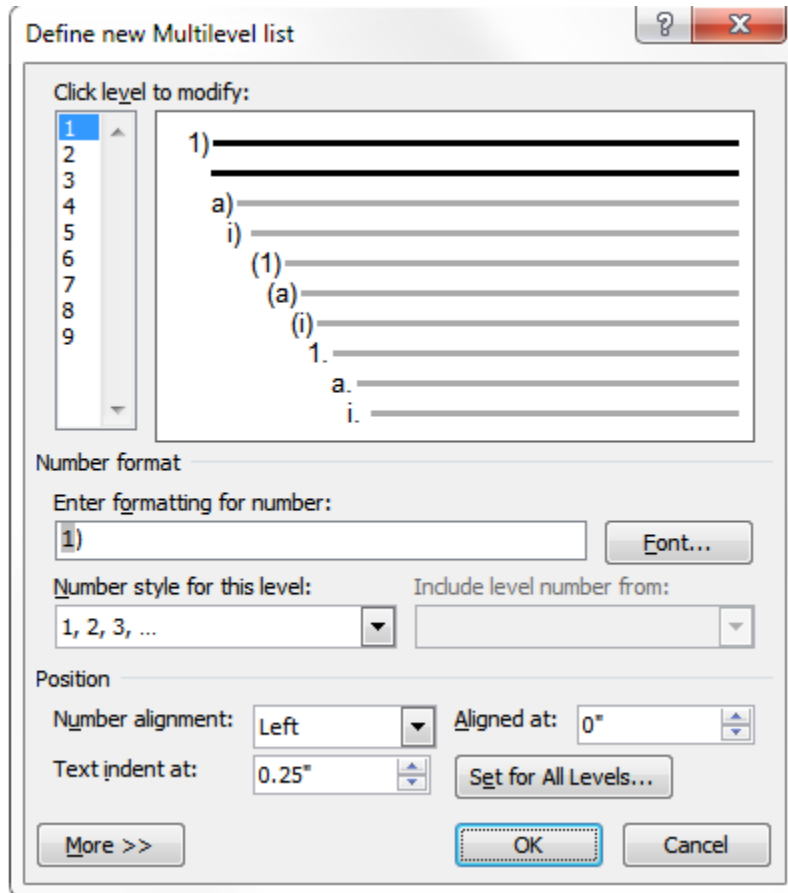
2. **Other.** This agreement may be terminated by either party at its option and without prejudice to any other remedy to which it may be entitled at law or in equity, or elsewhere under this agreement, by giving ten (10) days written notice of termination to the other party if the latter should.
 - 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.

2. **Why You Should Use Multilevel Numbering In Every Circumstance:** The Bullets button

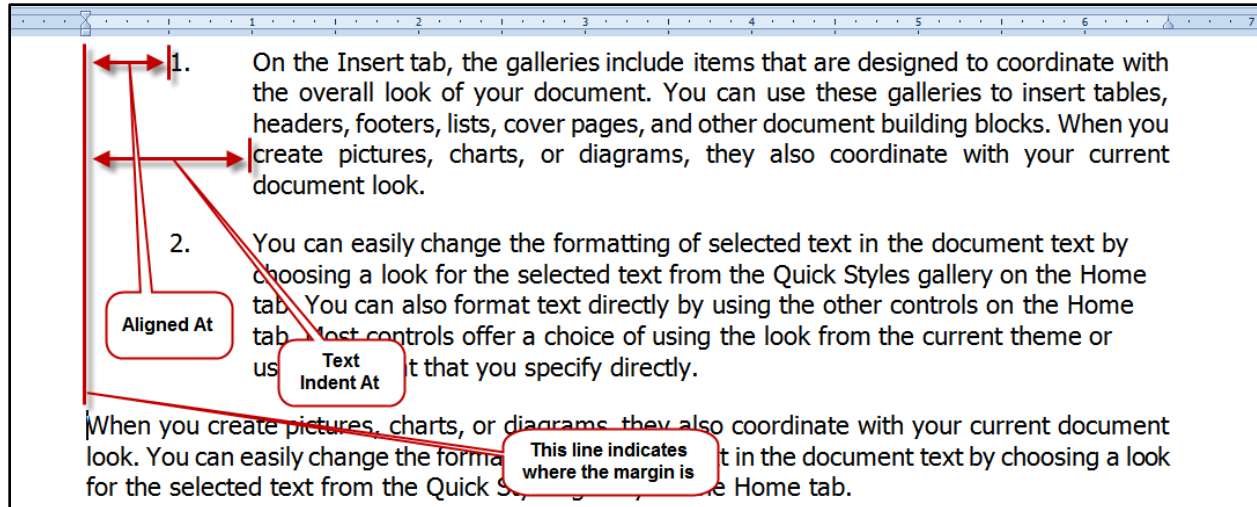
 and the Numbering button  only allow ONE level of bullets or paragraph numbers. Therefore, if you start with either one and later determine that you need a sub-level, you simply can't get there from here (and you're going to have to start over with a multilevel numbering scheme). Because of this, you must ***always*** 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).

3. **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.

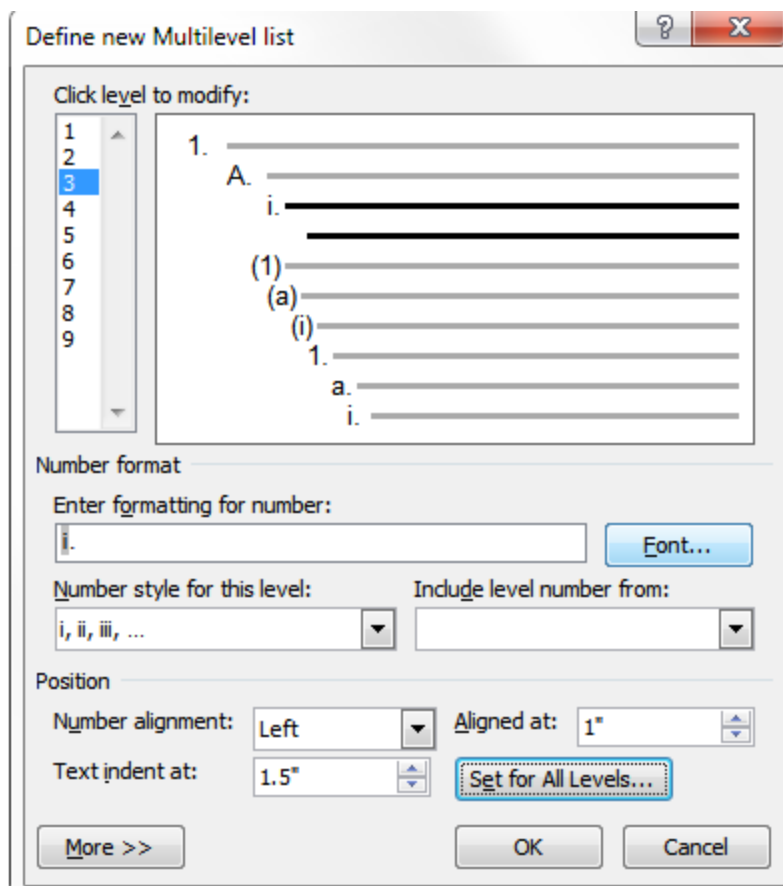
- A. Click the Home ribbon ➔ Paragraph group ➔ Multilevel List button arrow  button).
- B. Choose Define New Multilevel List (*not* Define New List Style) at the bottom of the drop down menu.



- C. You will now see the dialog shown above. Here are a couple of things to keep in mind:
- i. 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.
 - ii. 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.
 - iii. 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.
 - iv. Number alignment must always be set to Left, even if you're centering an article number.
 - v. Aligned at means how far away from the left margin you want your number to appear.
 - vi. Text indent at means how far from the left margin you want the text following the number to appear.

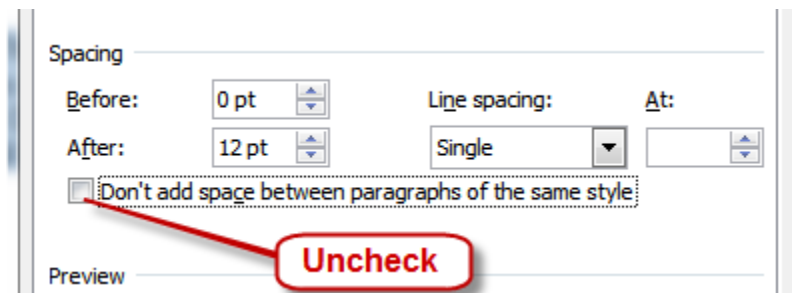


- vii. Below I have configured the dialog for a 3 level deep outline. Since I'm not going to use levels 4 - 9, there's no need to format them at this point.



- viii. 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.

4. **Change Outline Level of a Paragraph:** 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:
 - A. You can promote or demote a paragraph by clicking the Home ribbon ➔ Paragraph group ➔ Decrease/Increase Indent buttons .
 - B. 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.
 - C. If you right-click the paragraph, you can promote it by choosing Increase Indent or demote it by choosing Decrease Indent.
5. **Add Spacing Between Numbered Paragraphs:** If you want to add spacing between the numbered paragraphs, select all of the paragraphs you've typed ➔ right-click the selected text ➔ Paragraph. Add a 12 pt Space After and uncheck Don't add space between paragraphs of the same style. Then click OK.



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.
7. **Restart Numbering at 1:** Right click the paragraph you want to start over again at 1 and choose Restart at 1.
8. **Make Any 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).

9. Turn Numbering Off: There are two ways to do this:

- A. Hit the Backspace key twice; or
- B. Click the Numbering button  once

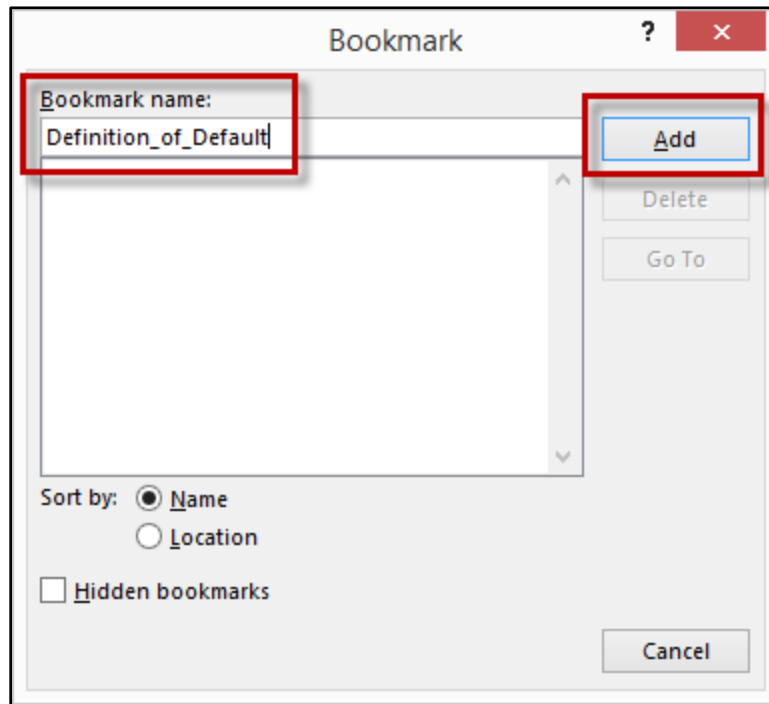
TIP 15 - NEVER TYPE A PARAGRAPH NUMBER CROSS REFERENCE: If you use automatic paragraph numbering (which you should ALWAYS use - see previous rule), then you can create paragraph cross references which can be automatically updated and therefore always correct.

- 1. Inserting Cross References:** Once you have incorporated automatic paragraph numbering into your document, you are ready to insert cross references. Cross references are used in legal documents quite frequently. Word provides a simple and convenient way to use cross references, automatically updating them if a paragraph is moved. For instance, in a contract, you 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.

There are multiple ways to utilize cross references but I'm only going to show you the best, most fool-proof way to do it here. Just follow these steps:

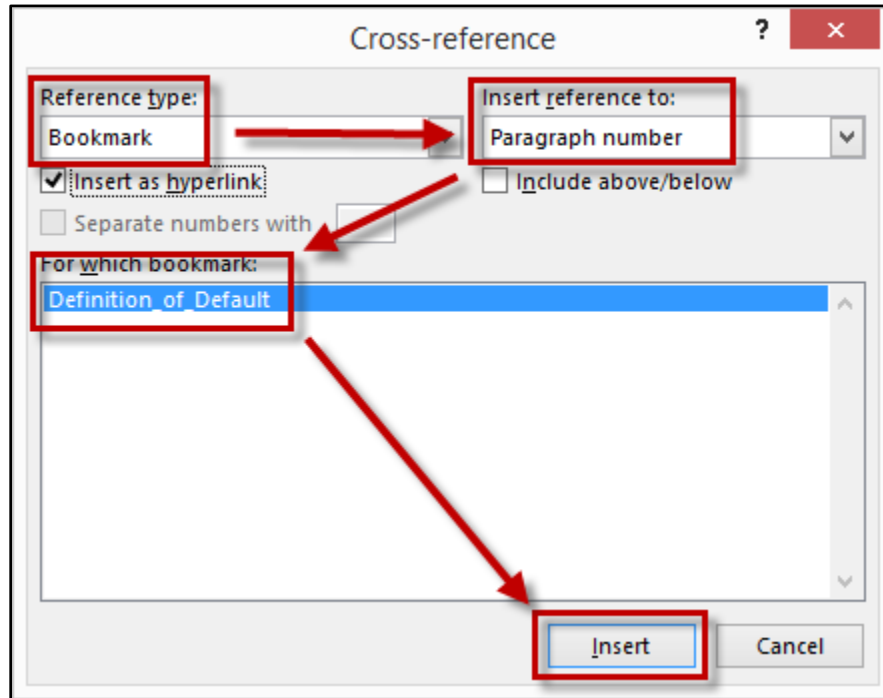
- A. Go to the paragraph you want to reference elsewhere and put your cursor in the paragraph. Click Insert ribbon ➔ click the Bookmark button ➔ enter a bookmark

name (no spaces allowed in the name) ➔ Add button. This adds a placeholder which you'll reference later.



- B. Go to the location where you would like to insert the cross reference to the paragraph marked in step 1 above. Place the cursor exactly where the cross reference will be inserted.
- C. Select Insert ribbon ➔ Links group ➔ Cross reference button.

- D. Under Reference type, select **Bookmark** (this is not the default). Under Insert reference to, select **Paragraph number** (this is also not the default). Click on the bookmark you want to reference, then click the Insert button, then click the Close button (the Cancel button becomes a Close button after you click Insert).

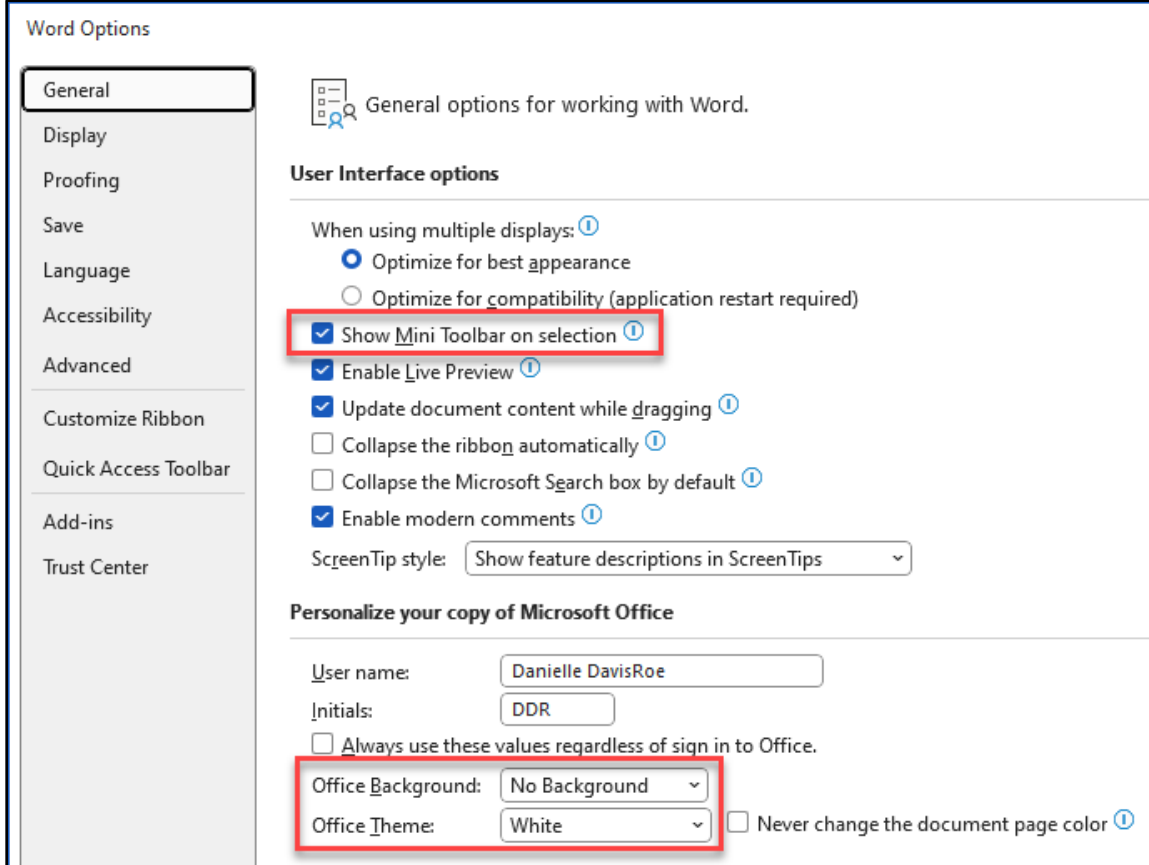


2. **Update Cross References:** After a cross reference is inserted, you may edit the document by adding or deleting paragraphs which will change the paragraph number being referenced. Cross references (tables of contents, tables of authority, indices and most other fields) do not automatically update so you have to update them. To ensure that all fields are correct in the document simply hit Ctrl + A to select the whole document ➔ Hit F9 to update.

TIP 16 - FIX WORD'S PROGRAMMATICAL DEFAULT SETTINGS IN WORD 365 FOR WINDOWS: There are a couple of things you can do to improve the way Word functions.

1. **In General:** **NOTE** that you get to all of the following screens by clicking the **File menu ➔ Options button**.

2. Options ➔ General:



Word Options

General

Display

Proofing

Save

Language

Accessibility

Advanced

Customize Ribbon

Quick Access Toolbar

Add-ins

Trust Center

General options for working with Word.

User Interface options

When using multiple displays: ⓘ

☒ Optimize for best appearance

☐ Optimize for compatibility (application restart required)

☒ Show Mini Toolbar on selection ⓘ

☒ Enable Live Preview ⓘ

☒ Update document content while dragging ⓘ

☐ Collapse the ribbon automatically ⓘ

☐ Collapse the Microsoft Search box by default ⓘ

☒ Enable modern comments ⓘ

ScreenTip style: Show feature descriptions in ScreenTips ▼

Personalize your copy of Microsoft Office

User name: Danielle DavisRoe

Initials: DDR

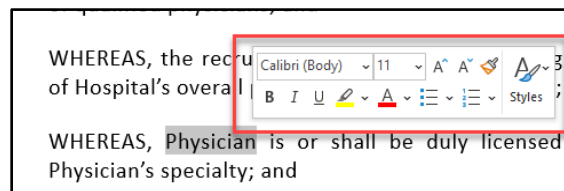
☐ Always use these values regardless of sign in to Office.

Office Background: No Background ▼

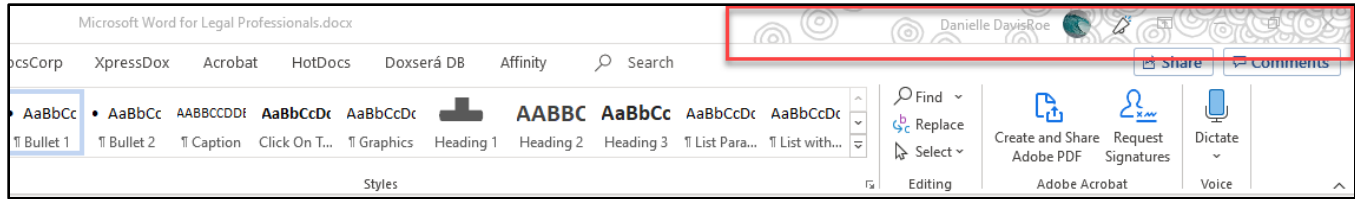
Office Theme: White ▼

☐ Never change the document page color ⓘ

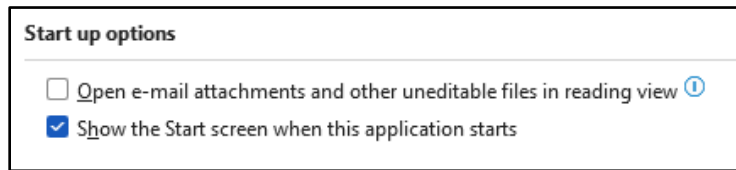
- **Show Mini Toolbar on selection:** This controls whether the mini toolbar appears when selecting text. Uncheck this box to prevent the mini toolbar from popping up and covering part of the document.



- 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**.

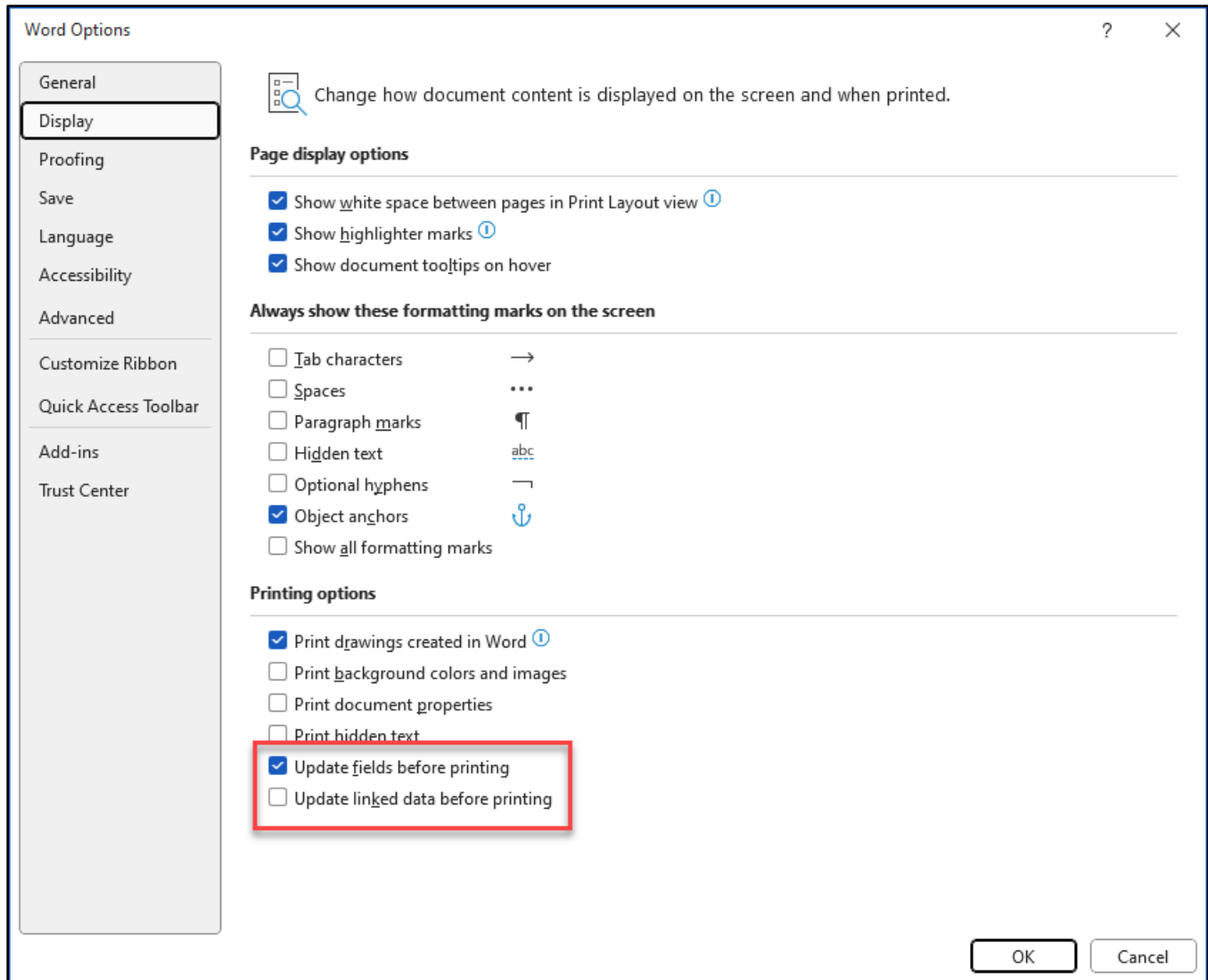


- **Office Theme: White, Dark Gray, and Black** change the bulk of the screen to the corresponding color. **Colorful** changes the bar across the top to the color associated with that program (blue for Word and Outlook, green for Excel, etc.).



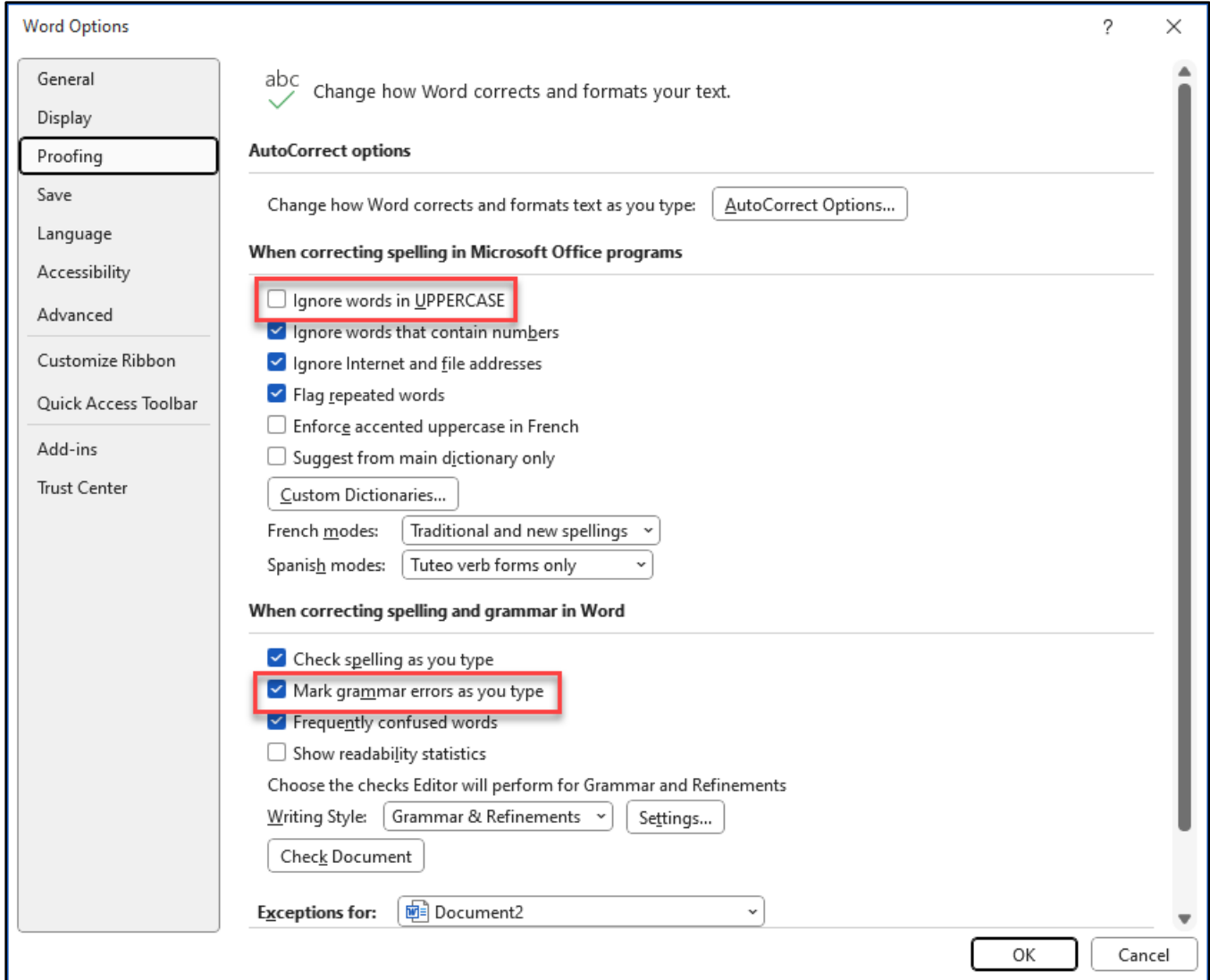
- **Open e-mail attachments and other uneditable files in Reading View:** When checked, Word documents attached to emails will open in Reading View. If you do not like the reading view, uncheck this box.
- **Show the Start screen when this application starts:** If checked, this is the reason you see 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.

3. Options ➔ Display:



- **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.

4. Options ➔ Proofing:



Word Options

General
Display
Proofing
Save
Language
Accessibility
Advanced
Customize Ribbon
Quick Access Toolbar
Add-ins
Trust Center

abc Change how Word corrects and formats your text.

AutoCorrect options

Change how Word corrects and formats text as you type: AutoCorrect Options...

When correcting spelling in Microsoft Office programs

☐ Ignore words in UPPERCASE
☒ Ignore words that contain numbers
☒ Ignore Internet and file addresses
☒ Flag repeated words
☐ Enforce accented uppercase in French
☐ Suggest from main dictionary only
Custom Dictionaries...
French modes: Traditional and new spellings
Spanish modes: Tuteo verb forms only

When correcting spelling and grammar in Word

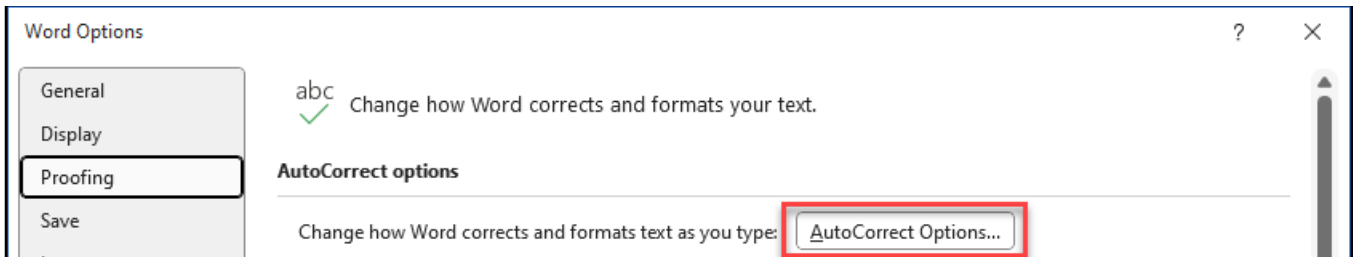
☒ Check spelling as you type
☒ Mark grammar errors as you type
☒ Frequently confused words
☐ Show readability statistics
Choose the checks Editor will perform for Grammar and Refinements
Writing Style: Grammar & Refinements Settings...
Check Document
Exceptions for: Document2

OK Cancel

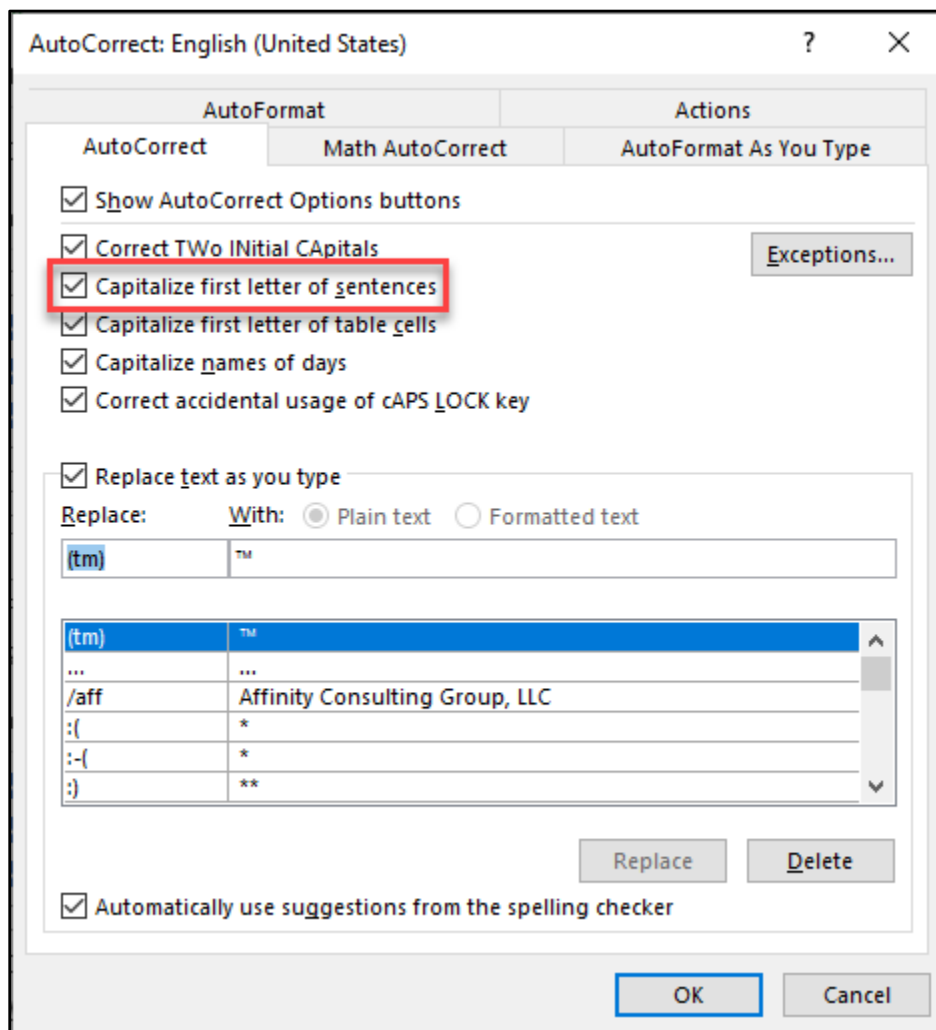
- **Ignore words in UPPERCASE. Uncheck this box.** Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.
- **Mark grammar errors as you type.** When checked, Word checks your grammar as you type and notes any perceived grammatical errors with green squiggly lines. Uncheck this box to eliminate the green squiggly lines in the document.

5. Options ➔ Proofing and Autocorrect:

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



A. AutoCorrect:



- **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 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 ®.

B. **AutoFormat As You Type:**

A screenshot of the Microsoft Word 'AutoCorrect' dialog box. The 'AutoFormat' tab is active, and the 'AutoFormat As You Type' sub-tab is selected. The 'Replace as you type' section has checkboxes for 'Straight quotes' (unchecked), 'Fractions' (checked), '*Bold* and _italic_' (unchecked), 'Internet and network paths' (unchecked), 'Ordinals' (checked), and 'Hyphens' (unchecked). The 'Apply as you type' section has checkboxes for 'Automatic bulleted lists' (unchecked), 'Border lines' (unchecked), 'Built-in Heading styles' (unchecked), 'Automatic numbered lists' (unchecked), and 'Tables' (unchecked). The 'Automatically as you type' section has checkboxes for 'Format beginning of list item' (unchecked), 'Set left- and first-indent' (checked), and 'Define styles based on your formatting' (unchecked). 'OK' and 'Cancel' buttons are at the bottom right.

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 on 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.

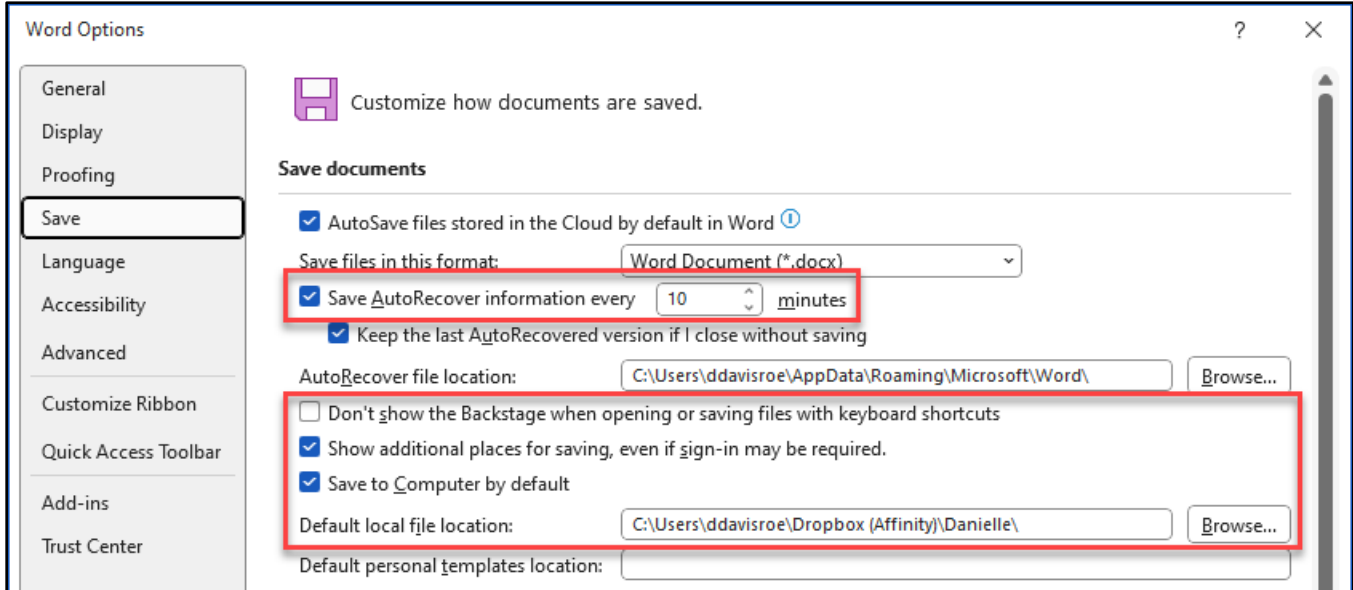
Finally, click on the **AutoFormat tab**.

The image shows the 'AutoCorrect' dialog box in Microsoft Word, specifically the 'AutoFormat' tab. The dialog box has a title bar with a question mark and a close button. It contains three tabs: 'AutoCorrect', 'Math AutoCorrect', and 'AutoFormat As You Type'. The 'AutoFormat' tab is selected, and it is divided into two sub-tabs: 'AutoFormat' and 'Actions'. The 'AutoFormat' sub-tab is active, showing several sections of options. The 'Apply' section has four checkboxes: 'Built-in Heading styles', 'Automatic bulleted lists', 'List styles', and 'Other paragraph styles'. The 'Replace' section has six checkboxes: 'Straight quotes' with 'smart quotes' (unchecked), 'Ordinals (1st) with superscript' (checked), 'Fractions (1/2) with fraction character (½)' (checked), 'Hyphens (--) with dash (—)' (unchecked), '*Bold* and _italic_ with real formatting' (unchecked), and 'Internet and network paths with hyperlinks' (unchecked). The 'Preserve' section has one checkbox: 'Styles' (unchecked). The 'Always AutoFormat' section has one checkbox: 'Plain text e-mail documents' (unchecked). At the bottom right, there are 'OK' and 'Cancel' buttons.

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

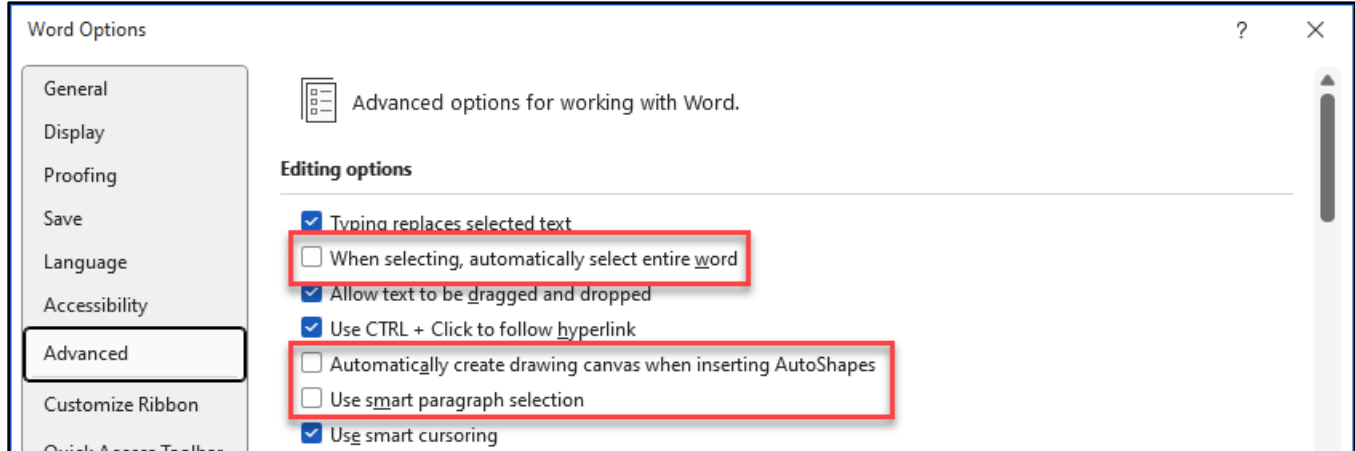
At this point, make sure to click the **OK** button or all of the changes will be lost.

6. Options ➔ Save:



- **Save AutoRecover information every __ minutes:** 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.

7. Options ➔ Advanced ➔ Editing Options:

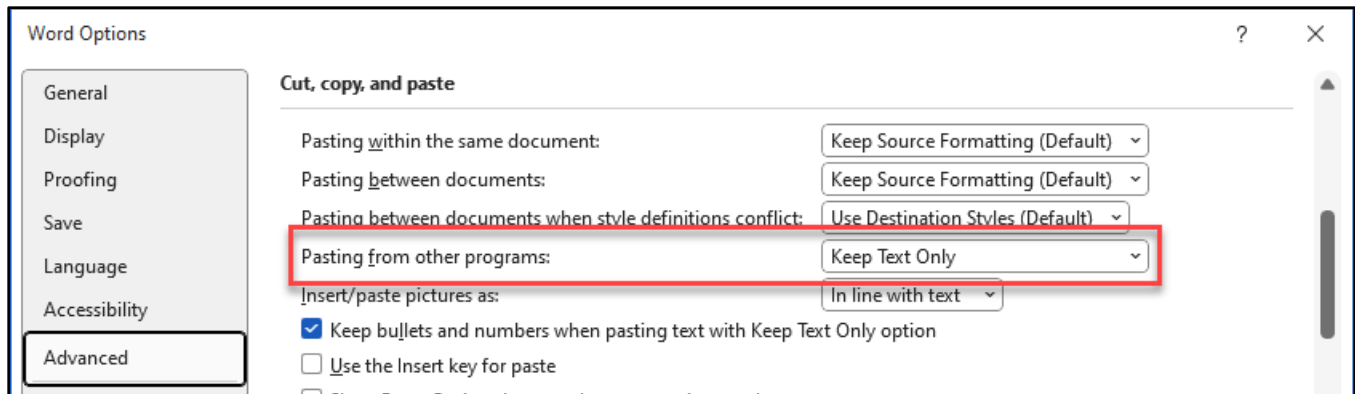


- Uncheck **When selecting, automatically select entire word**. Regain control over your mouse.
- Uncheck **Automatically create drawing canvas when inserting AutoShapes**.
- Uncheck **Use smart paragraph selection**. If checked, Word will automatically select the paragraph mark at the end of a paragraph 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.

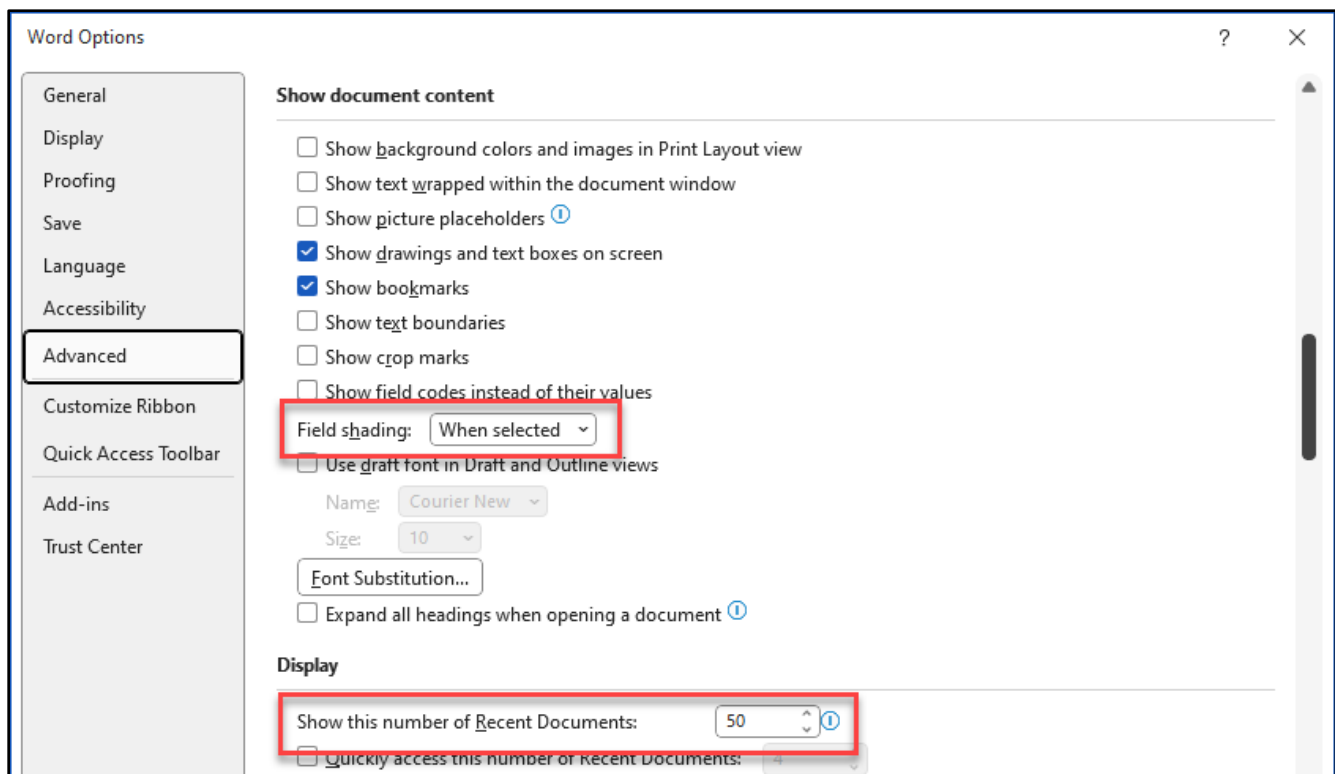
Some other items to watch out for are:

- 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.

- ## 8. 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.

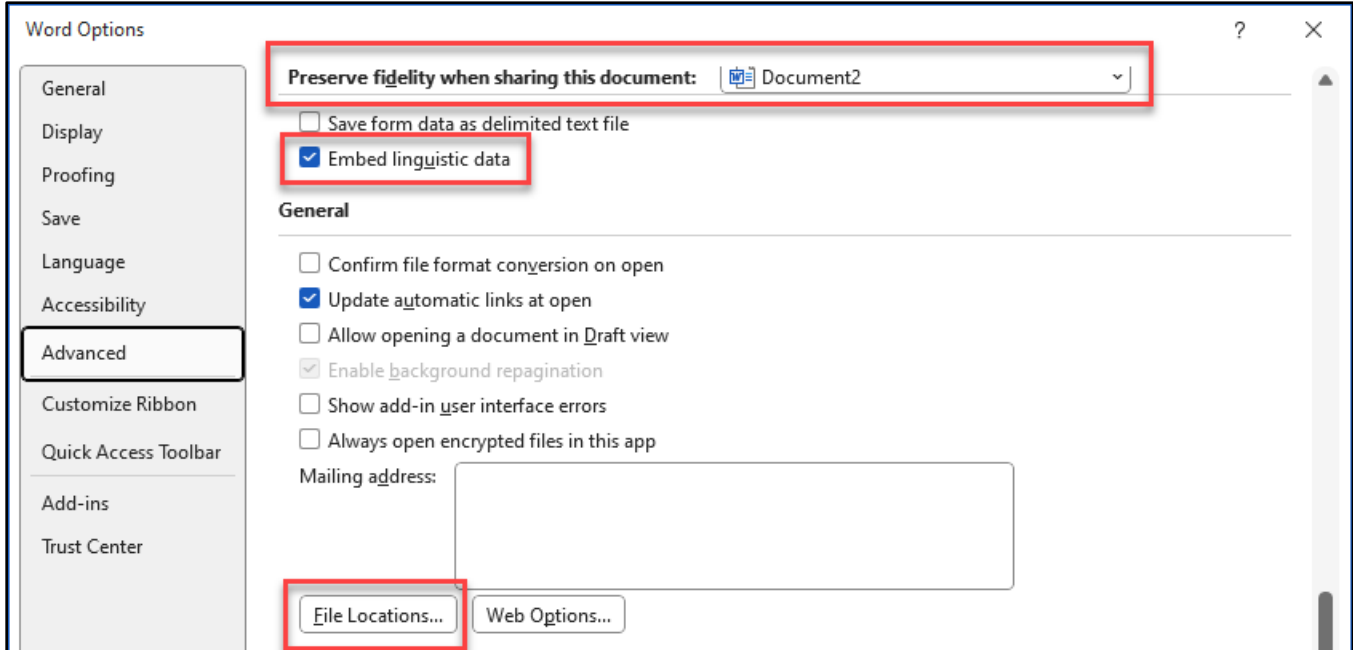


9. Options → Advanced → Show Document Content:



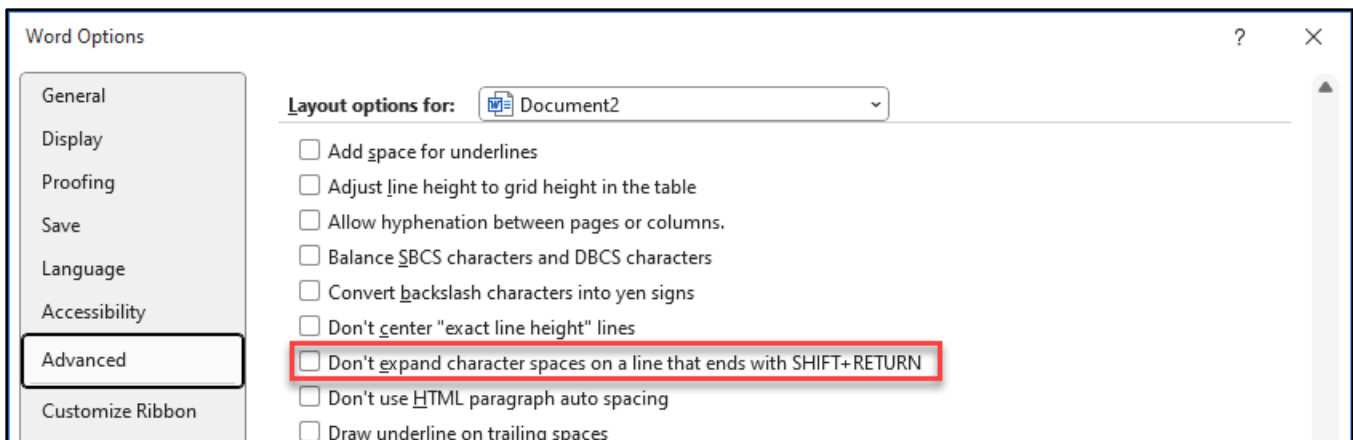
- Change **Field shading** to **Always**.
- Change **Show this number of Recent Documents** to your preference.

10. Options ➔ Advanced ➔ Fidelity & General:



- 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.

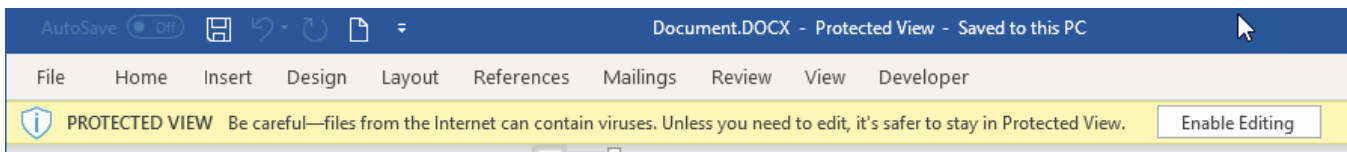
11. Options ➔ Advanced ➔ Layout Options:



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

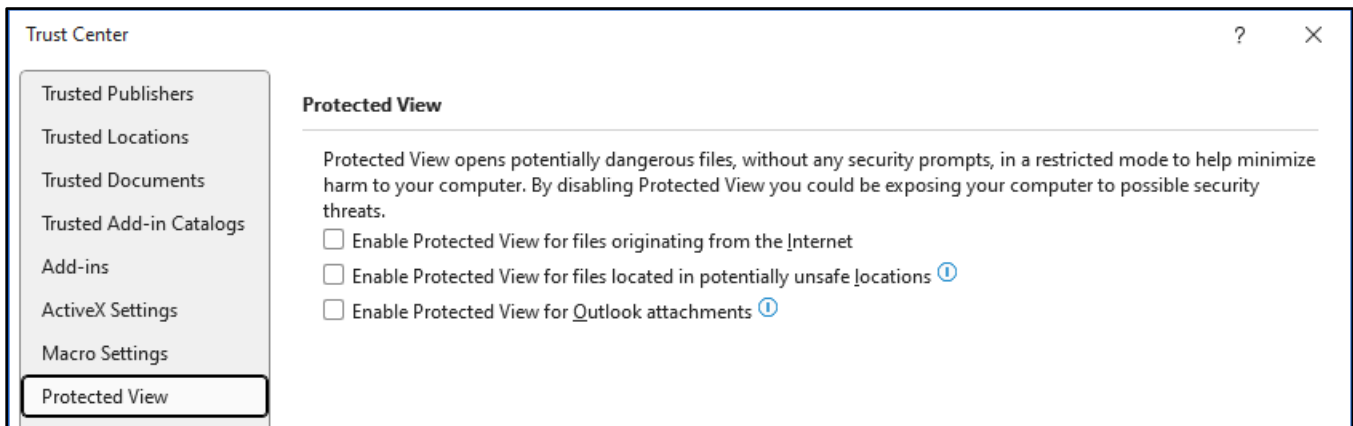
gaps between each word. For your information, Shift + Return = "soft return" which tricks Word into thinking that what appears to be two lines of text are actually one line of text.

12. **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 **Error! Reference source not found.**

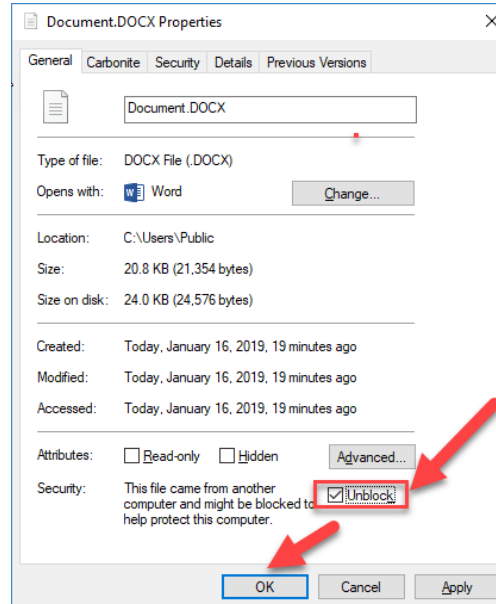


These boxes enable protected view, unchecking them disables the protection.

- **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.

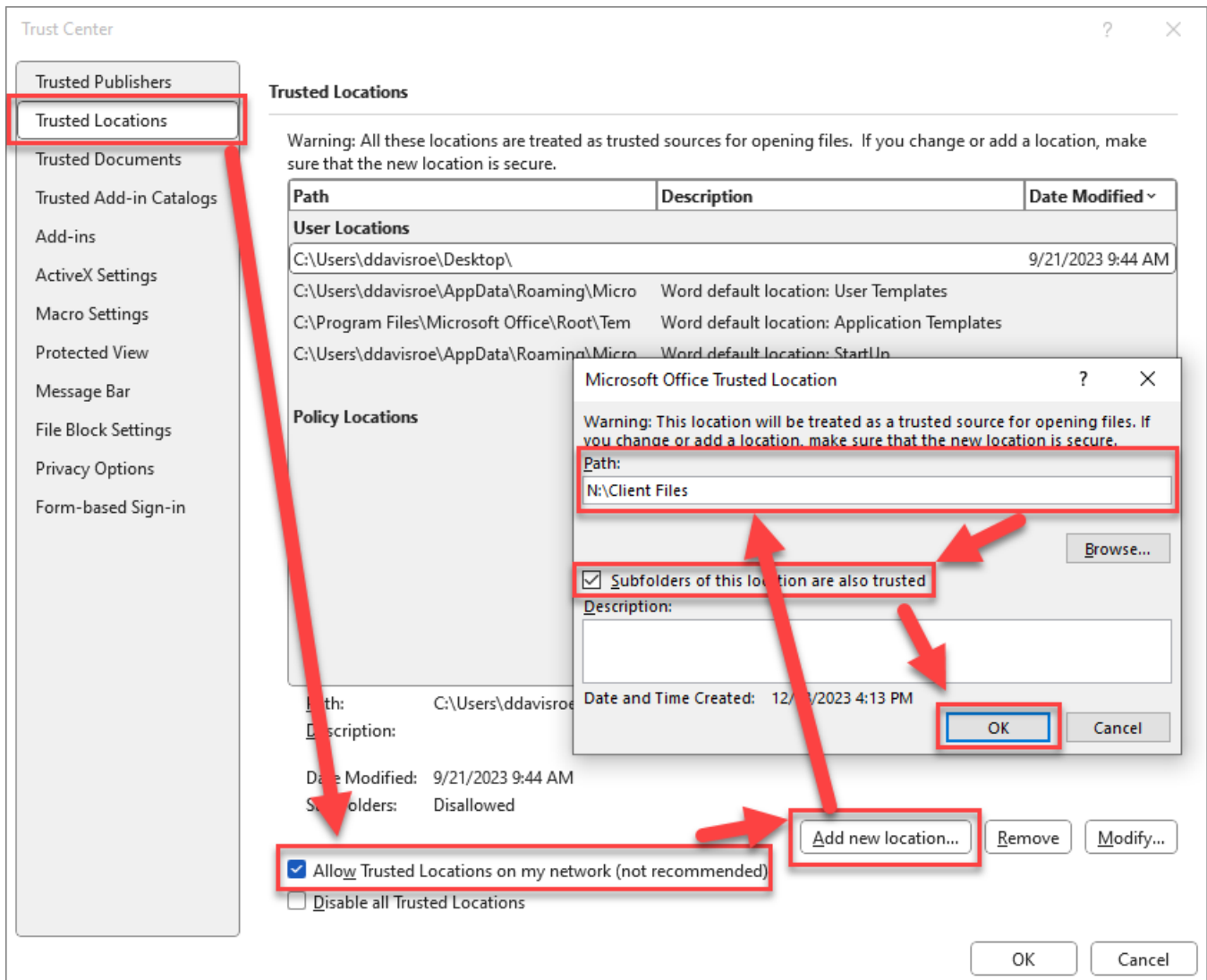
- **Enable Protected View for Outlook attachments.** With this checked, you will receive a protected view warning for every Word document that you open as an attachment from Outlook. Unchecking this box turns off the protection.

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**:



13. **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:

- Go to **File ➔ Options ➔ Trust Center ➔ Trust Center Settings ➔ Trusted Locations**.
- Check the **Allow Trusted Locations on my network**. You will not be able to enter a network location without checking this box.
- 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.



14. **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 file types**,



select **Open selected file types in Protected View and allow editing**. See **Error! Reference source not found..**

Trust Center

Trusted Publishers
Trusted Locations
Trusted Documents
Trusted Add-in Catalogs
Add-ins
ActiveX Settings
Macro Settings
Protected View
Message Bar
File Block Settings
Privacy Options
Form-based Sign-in

File Block Settings

For each file type, you can select the Open and Save check boxes. By selecting Open, Word blocks this file type, or opens it in Protected View. By selecting Save, Word prevents saving in this file type.

File Type	Open	Save
Word 2007 and later Documents and Templates	☐	☐
OpenDocument Text Files	☐	☐
Word 2007 and later Binary Documents and Templates	☐	☐
Word 2003 Binary Documents and Templates	☐	☐
Word 2003 and Plain XML Documents	☐	☐
Word XP Binary Documents and Templates	☐	☐
Word 2000 Binary Documents and Templates	☐	☐
Word 97 Binary Documents and Templates	☐	☐
Word 95 Binary Documents and Templates	☒	☐
Word 6.0 Binary Documents and Templates	☒	☐
Word 2 and earlier Binary Documents and Templates	☒	☐
Web Pages	☐	☐
RTF Files	☐	☐
Plain Text Files	☐	☐
Legacy Converters for Word	☐	☐

Open behavior for selected file types:

☐ Do not open selected file types

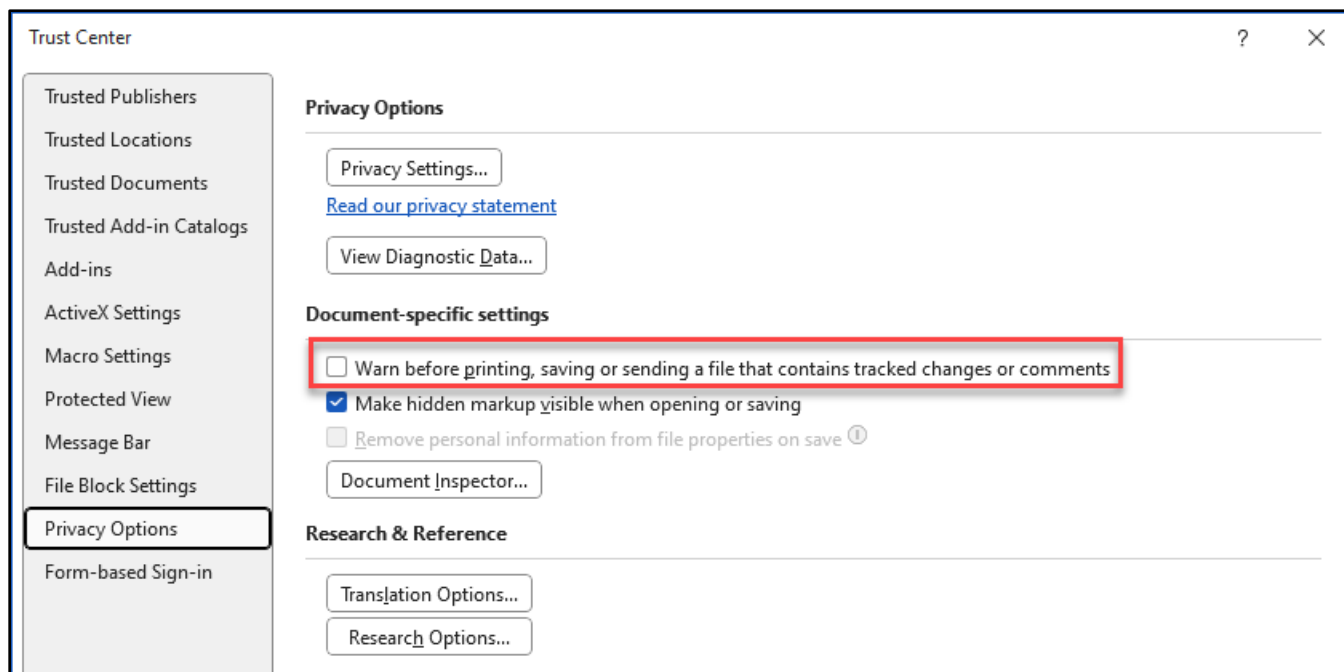
☒ Open selected file types in Protected View

☐ Open selected file types in Protected View and allow editing

Restore Defaults

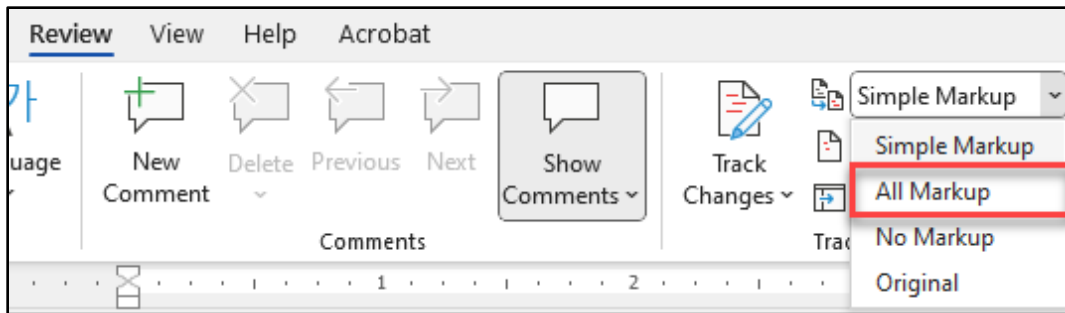
OK Cancel

15. Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Privacy Options:

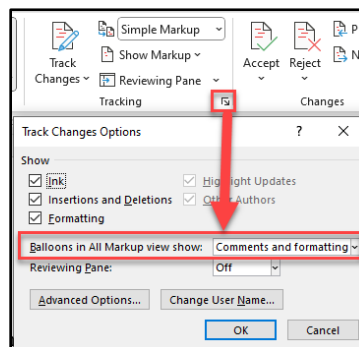


Go to the **Trust Center** and click the **Trust Center Settings button**. A new dialog will open. Click on **Privacy Options** and check **Warn before printing, saving or sending a file that contains tracked changes or comments**.

16. **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.
17. **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**.
- A. **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).



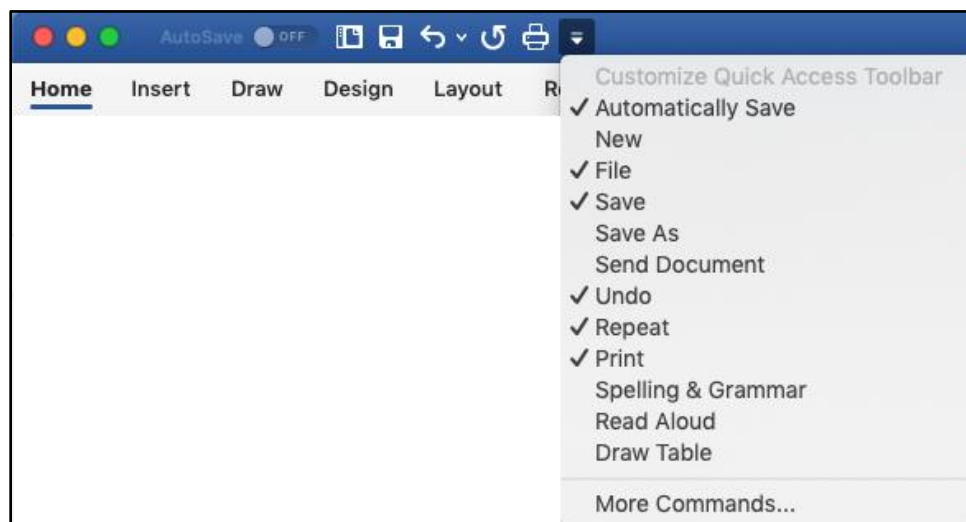
- B. **Track Changes Options:** In order to get to this dialog, click **Review** ribbon ➔ **Tracking** launcher.



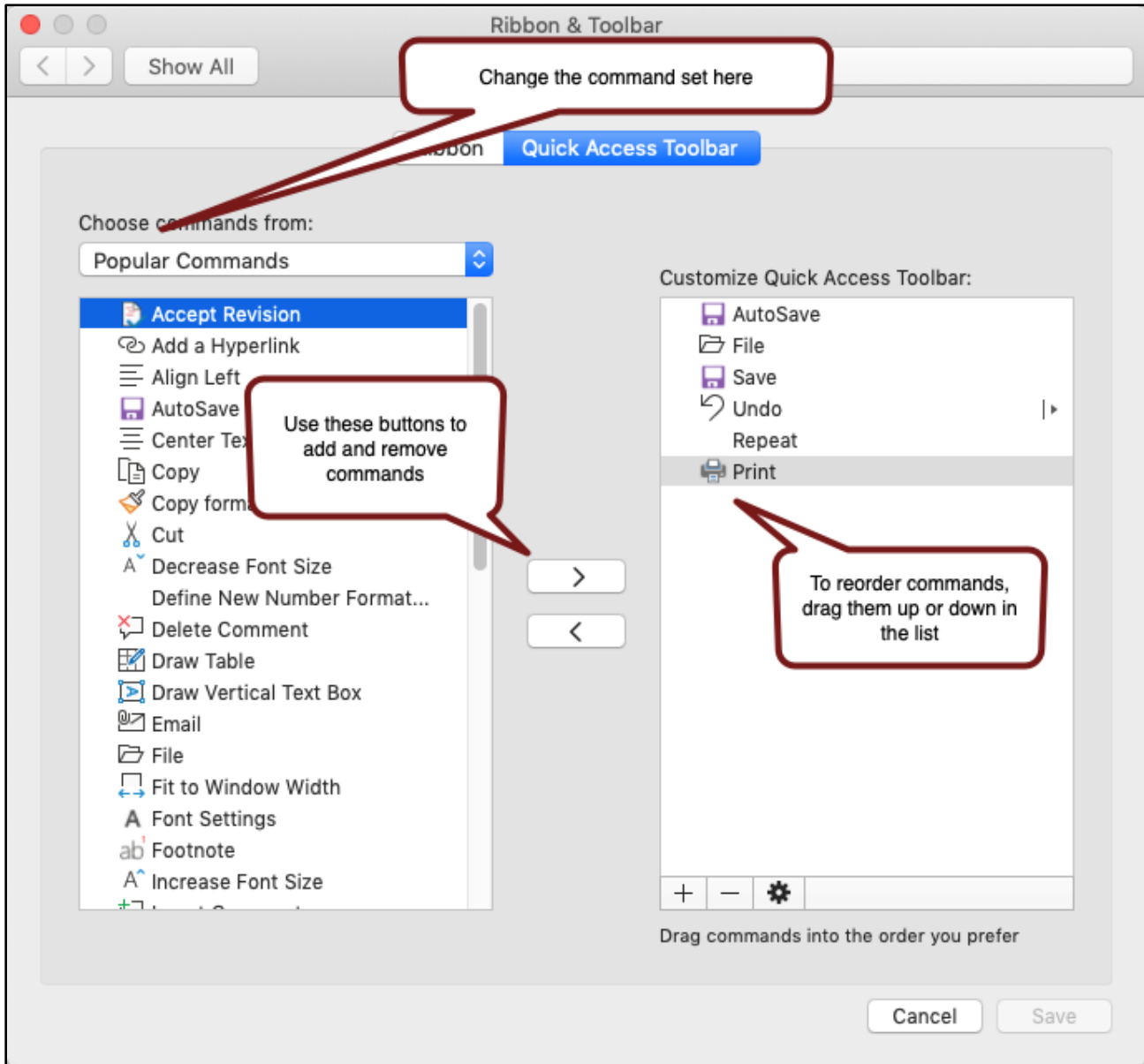
Balloons in All Markup view show: Set this to **Comments and formatting**.

TIP 17 - FIX WORD'S PROGRAMMATICAL DEFAULT SETTINGS IN WORD 365 FOR MAC: There are a couple of things you can do to improve the way Word functions.

- Quick Access Toolbar - Suggested Law Office Modifications:** You can add commands through the Quick Access Toolbar ("QAT") menu by clicking on the  icon on the right edge of the toolbar, then choosing the commands you wish to add. The menu contains items for the most common commands.



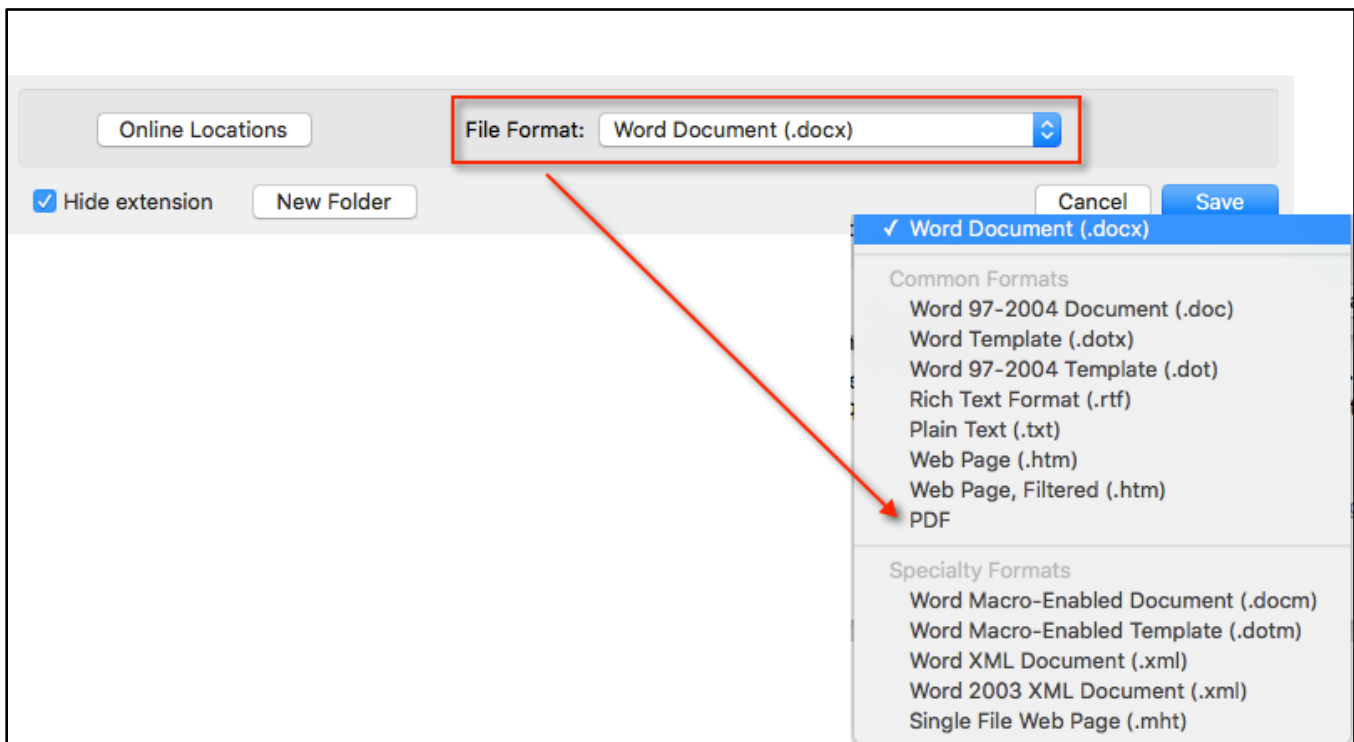
If you choose **More Commands** from the dropdown, then you are presented with this screen.



The following are some common options, all of which can be found under the All Commands category (Popular is the default so you'll have to switch it):

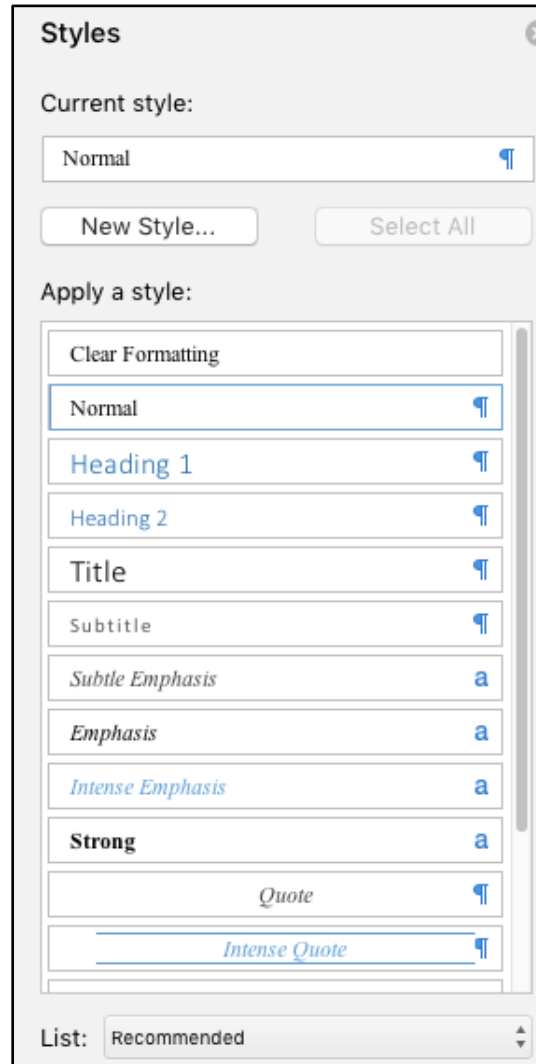
- AutoText (it is very important that you add this one)
- Edit Footer
- Edit Header
- E-mail: Emails the current document as an attachment in one click.

- Envelope & Label Wizard: This opens the envelopes and labels wizard.
 - Print: This option brings up the print dialog box
 - Quick Print: This option prints the open document to the default printer.
 - Styles Pane: Opens style window.
 - Switch windows command
 - Track Changes: Automatically track proposed changes you make to a document.
2. **Saving as PDF:** Word allows you to simply save a Word document as a PDF. Just be advised that creating a PDF from a Word file does not save the Word file (you must do that separately). In order to create a PDF from a Word file, simply click the **File menu ➔ Save As ➔ change File Format to PDF ➔ Save button**.



3. **Problems With Word's Default Formatting for Legal Users:** There two main issues that you'll need to address before you start working with Word:
- A. 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 1.15 (rather than single) and there is auto-paragraph spacing turned on (10 point after). You probably want a different font, and you certainly don't want 1.15 line spacing and 10 point spacing between paragraphs as your default.

- B. Word's default style settings are also inappropriate for legal documents. Rather than provide you with styles for a block quote, our outline paragraph numbering, you get the following, utterly useless and inappropriate styles (some of which have blue text):



4. Word's Default Template:

- A. **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. In Word, unless you direct otherwise (by choosing a specific template as the basis of your new document), Word uses a default template called "normal.dotm" to create every new document. In Word, you are prompted to select a template whenever you open a new document (unless you fix this default setting by clicking **Word menu** ➔ **Preferences** ➔ **General** ➔ clear **"Show Document Gallery when opening Word"**). To open the "normal.dotm" template in Word, 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.

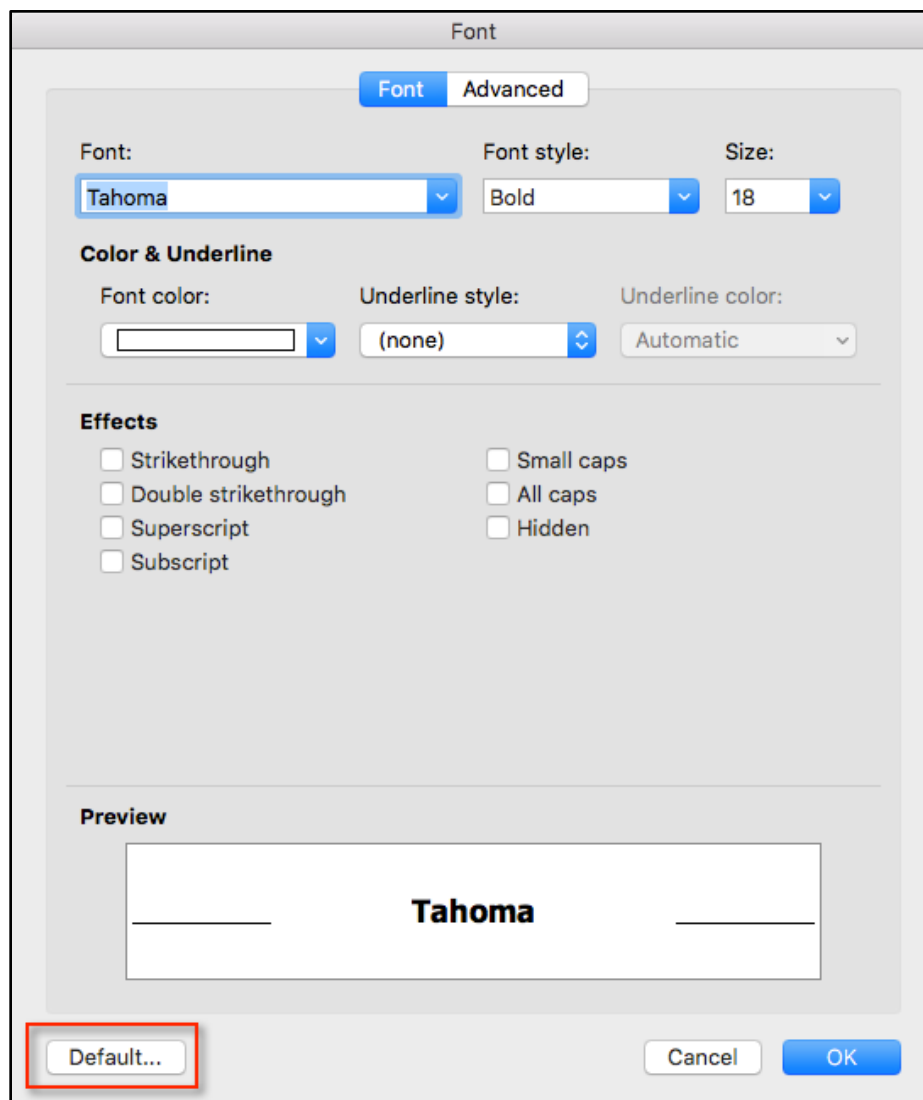


Default document settings are still stored in the Normal template (as they were in previous versions of Word). However, the template is now called "Normal.dotm" as opposed to "Normal.dot". This template is usually located in:

/Users/username/Library/Group Containers/UBF8T346G9.Office/User Content/Templates/

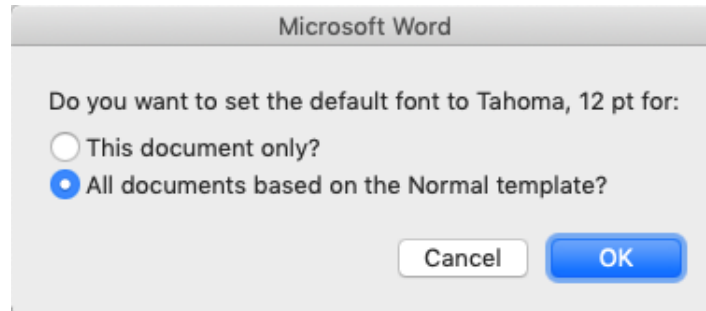
5. How To Fix Word's Formatting Defaults:

- A. **Change Your Default Font Formatting:** If you don't like Calibri 11 or Word's other defaults related to Fonts, simply follow these steps to fix them:
- Open a blank document in Word
 - Click the menu item **Format ► Font**. This will make the Font dialog appear.
 - Make your adjustments to the font size and click the **Default button** at the bottom of the dialog.



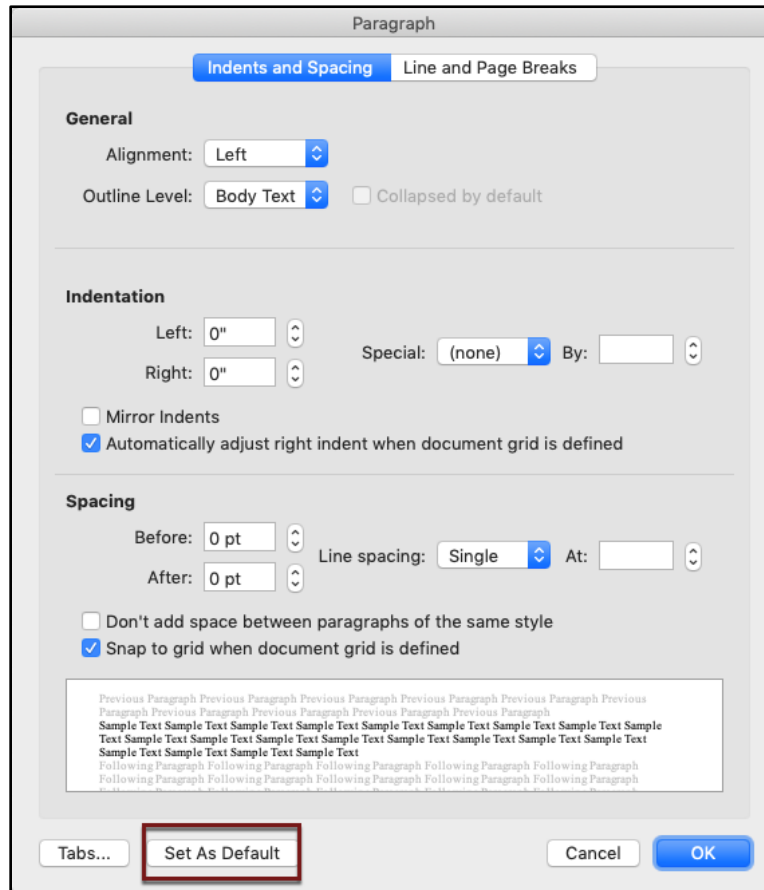


In Word, you'll see the following dialog/warning. Select "All documents based on the Normal template". Click "OK".

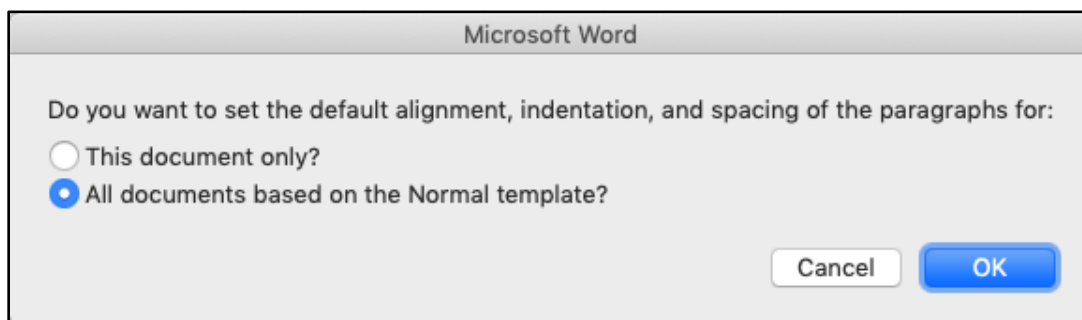


- B. **Change Your Default Paragraph Formatting:** Simply follow these steps to fix them:
- i. Click the menu item **Format ► Paragraph**
 - ii. **Recommended changes** to the Paragraph dialog (Indents and Spacing tab):
 - a. Leave left and right indentation at 0" and Special at "(none)"
 - b. Make spacing before and after 0 pt.
 - c. Line spacing Single
 - d. If you prefer, switch the Alignment to Justified

- iii. Click the "Set As Default" at the bottom of the dialog

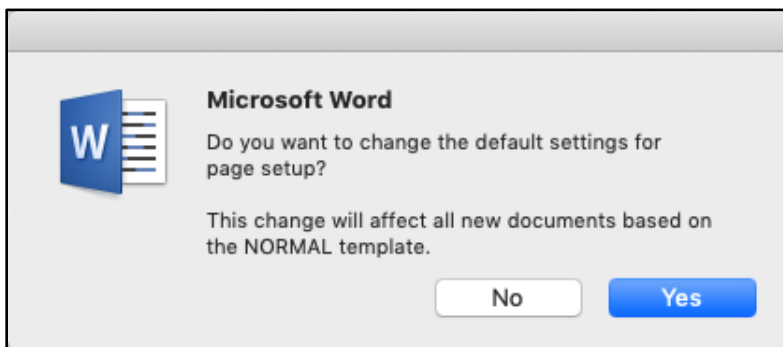


- iv. In Word, you'll see the following dialog/warning. Select "All documents based on the Normal template". Click "OK".



- C. **Change Your Default Layout Formatting:** Simply follow these steps:
- Open a blank document in Word
 - Click the menu item **Format ► Document**. This will make the Page Setup dialog appear.
 - Recommended changes** to the Section dialog (Indents and Spacing tab):

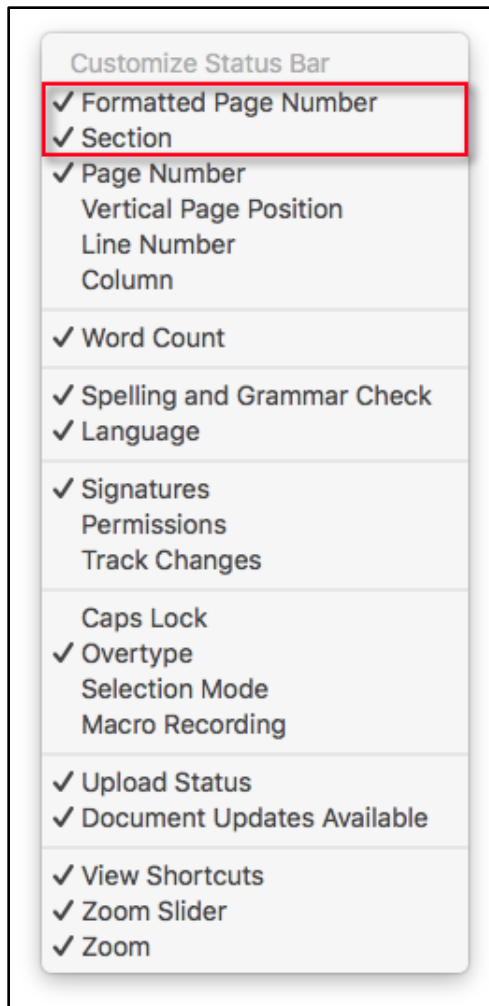
- iv. Margins tab: Most legal users prefer 1" margins on all sides
- v. After making your page setup adjustments, click the **Default button** at the bottom of the dialog. Next, you'll see the following dialog/warning. Click **Yes** and you're done!



- D. **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 formatting 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).

- E. **Customize 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. Right-click the **Status Bar** and you'll see the options you can add to it. We recommend adding, at a minimum, **Formatted Page Number** and **Section**.



- F. **Turn On The Ruler:** As you'll see in later chapters, the ruler is extremely important in Word and unfortunately, it may be turned off in Word. To turn it on, simply open a blank document, click the View menu ➔ check the Ruler box.
- G. **How to Create Keyboard Shortcuts:** You can assign shortcut keys to anything in Word. This is useful for increasing speed or for re-assigning WordPerfect shortcut keys to do the same things in Word. To customize your keys, follow these steps:
- i. In Word, click the **Tools ➔ Customize Keyboard**.
 - ii. Click on the category you want and the related command appear on the right side of the screen. You may have to hunt for what you're looking for. Once you locate the command you want to assign a shortcut key to, click once on it so it is highlighted ➔ click into the "**Press new shortcut key**" box and hit the key combination you want ➔ click the **Assign** button ➔ click the **OK** button.

Customize Keyboard

Specify a Command

Categories:

File
Edit
View
Insert
Format
Tools
Table

Commands:

FileCheckin
FileCheckout
FileClose
FileCloseAll
FileCloseOrCloseAll

Specify a Keyboard Shortcut

Current keys:

Remove

Press new keyboard shortcut:

Assign

Description:

Check in a Document.

Save changes in:

Normal.dotm

Reset All...

OK



EXHIBIT A

LEGAL-SPECIFIC SOFTWARE TRAINING CLASSES

All of the following are designed and taught *by lawyers for lawyers*, paralegals and legal assistants.

Class Options The descriptions are shown below and costs are on page 2 (options for on-site or live webinar).

- **Word For Power Users** - This is our benchmark training program. - 7.5 hours (typically broken into five 1.5 hour classes if delivered via webinar)
- **Word Masters Class** - This is strictly hands-on for attendees and covers all of the steps necessary to build perfect templates out of any document, no matter how bad the starting point may be. This class is a deep dive into Word's most important feature (Styles); and we also cover in greater depth tables of contents, tables of authority, automatic paragraph numbering and cross references. - 3 hours
- **Word For Casual Users** - This is aimed at lawyers or administrative staff who don't do a lot of word processing but want to know more, edit confidently, and not make it harder for support staff to do their jobs (like clean up documents from a formatting perspective). - 3 hours
- **WordPerfect to Word Transition training** - This is for firms moving from WP to Word. Everything about Word is explained in terms of WP. 9 hours (typically broken into six 1.5 hour classes if delivered via webinar)
- **Outlook for Legal Professionals** - This focuses on managing high volume email, but also covers the calendar, tasks and contacts. - 3 hours
- **PDF Training - Covering Acrobat, Power PDF or PDF Editor** - 3 hours
- **Excel for Legal Professionals** - 3 hours
- **PowerPoint for Legal Professionals** - 3 hours
- **Microsoft 365 (fka Office 365)** This focuses on the included apps that most subscribers don't know are there and what they can be used for - 1 hour

All Trainers Are Lawyers All of our trainers are licensed lawyers with years of experience providing technical training for legal users.

On-Site or Webinar We offer both options. We can also deliver training on-site while simulcasting it to other offices.

Customized For Your Office We can customize any of the classes for you, and cover any topic you desire.

Manuals Included Comprehensive manuals are included with Word, Outlook, Excel, Acrobat, Power PDF and PDF Editor classes.



Free Technical Support Included For on-site training, we provide one free day of technical support on the products for which we provided training. For webinar training, we provide 15 minutes of tech support for each hour of training time. The technical support expires 7 days after the last day of training.

Classes Recorded For Future Use We record *all* training segments whether they're webinars or on-site, at no additional charge. You receive MP4 files of each video afterwards so you can use them again in the future for new employees or refresh training.

Qualify for CLE Credit All of our classes have been taught for bar associations and CLE providers in the past. If you apply for it, you should be able to get CLE credit for any of our classes as an inducement for your lawyers to attend.

Flat Fee Training Costs We do not charge by the number of attendees, so the more people you have in the class, the lower the cost per attendee. Attendees do not all have to work at the same law office so if you would like to join with another law office and split the costs, that is also fine.

On-Site - \$4,500 per day plus reimbursement of travel expenses - regardless of number of attendees. The maximum number of hours per day is 7 (excluding breaks and lunch).

Webinars - delivered via Zoom or Teams

Word For Power Users - \$4,250

Word Masters Class - \$1,750

Word for Casual Users - \$1,750

WordPerfect to Word - \$5,000

Outlook - \$1,750

Acrobat, Power PDF or PDF Editor - \$1,750

Excel - \$1,750

PowerPoint - \$1,750

Microsoft 365 (fka Office 365) - \$1,000



Other Services We also offer:

Hands-On Assessment Testing for Word, Excel and/or Acrobat - If you want to know where your users are regarding knowledge of these programs, just sign them up for an assessment test. For options and pricing, just click here: <https://bit.ly/3GOpaMk>

Document Automation/Assembly - We're the experts on automating your firm's complex document generation using HotDocs, or HighQ (fka Contract Express).

Technical Support - Technical support in Word, Outlook, Excel, PowerPoint, Adobe Acrobat, Kofax Power PDF and Foxit PDF Editor. We can solve any issue and we offer support either pay-as-you-go or for a flat fee per month.

Word Emergency Room - If anyone from your firm has a Word tech-support emergency, just email the offending document to **WordER@AffinityConsulting.com**. We monitor that address 7 days a week from 9 AM to 9 PM ET. It's a \$250 flat fee to fix any issue. Typical turn-around time is an hour.

Template Building - We build templates for your firm derived from the best examples of any type of instrument. Creating new documents by recycling old documents drafted for other cases has a high margin for error and is slow. Good templates increase accuracy and speed.