

# 1 KEY FOR USING THIS MANUAL

## RIBBONS

If the instructions say to click on the View Ribbon, I mean to click on the View tab across the top of the Word screen:

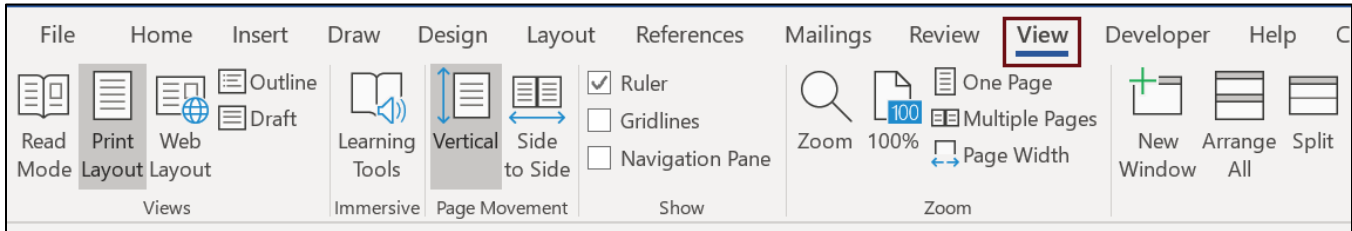


FIGURE 1-1

## GROUPS

Each ribbon is segmented into Groups. So if the instructions in this manual say to click on the Border button in the Paragraph group on the Home Ribbon, this is what I mean:

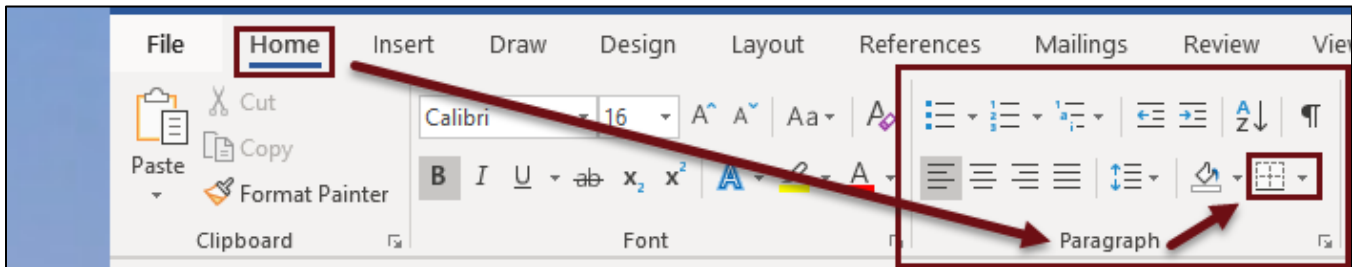


FIGURE 1-2

## LAUNCHERS

There are tiny little arrows in the bottom, right-hand corner of many groups. These little arrows are actually well-disguised buttons that are very important in Word. If the instructions say to click on the **Font Launcher** or the **Paragraph Launcher** in the Home ribbon, I'm referring to the buttons identified below:

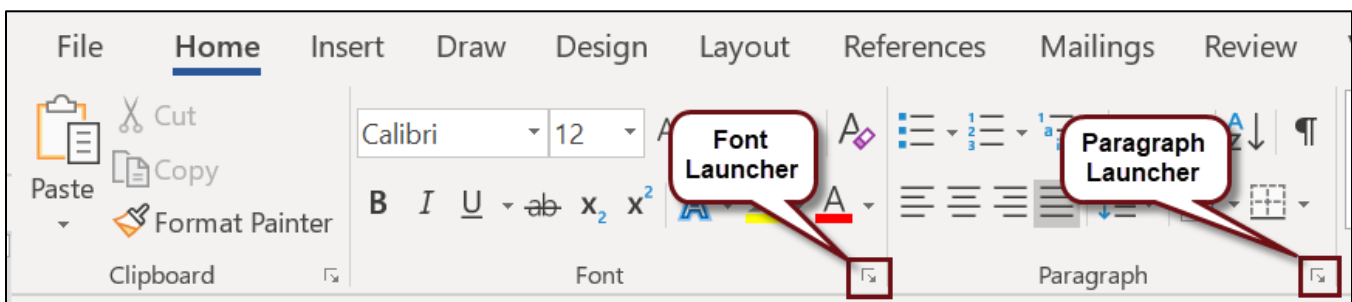


FIGURE 1-3

The term **Page Setup Launcher** is also used repeatedly in the instructions that follow. I'm referring to the button identified in Figure 1-4 below.

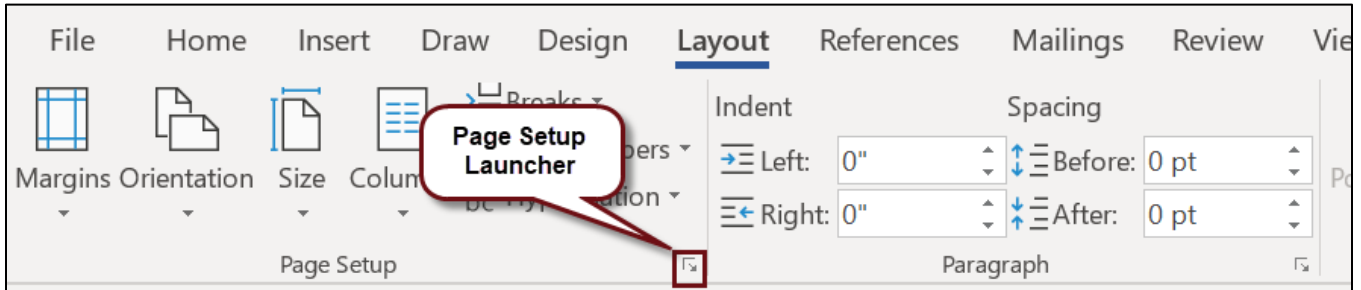


FIGURE 1-4

# 2

## IMPORTANCE OF WORD PROCESSING IN A LAW OFFICE

### BENEFITS OF WORD PROCESSOR EFFICIENCY FOR LAW OFFICES

#### Ultimate Tool for Creating Work Product

As you know, legal services are typically document intensive and often, the service rendered is the document itself (estate planning documents, purchase contracts, leases, etc.). Even in practice areas where the document is not the final product (such as litigation), most of the work still involves creating documents. In view of this, efficient use of the tool we use to create documents (Microsoft Word) is extremely important.

#### Client Service and Professionalism

The reality of our profession is that clients are often unable to judge the quality of our work simply because they lack the necessary training. Notwithstanding this fact, there is no question that consumers of legal services form opinions about their attorneys. These opinions typically have little to do with the quality of the work and a lot to do with things like responsiveness, communication and the speed with which the work is completed. Since efficient word processing significantly improves all three of these aspects, it can directly affect client relations.

In addition, document appearance creates a distinct impression with the client. Sloppy document formatting, typos and other mistakes cause clients to doubt their attorney's competence, even if the document is substantively sound.

#### Keeping Up

An attorney's stress level is often directly proportional to the length of his/her "to-do" list, and the majority of the "to-dos" are usually related to some type of document generation.

#### Efficiency

In spite of its obvious importance, the majority of Word users only utilize a fraction of the functionality available simply due to a lack of instruction. For example, it is common for even experienced Word and WordPerfect users to waste huge amounts of time wrestling with paragraph numbering and document formatting or manually performing tasks that word processors can perform automatically (and instantly) such as generating a table of contents, a table of authorities, cross references, footnotes and the like. It should also be noted that the number of years spent using a particular word processor often has absolutely no correlation to the skill level developed.

The point is that word processing is an area of significant inefficiency for almost all law firms and legal departments. So do not fool yourself into believing that document production efficiency cannot be improved dramatically even if you consider your staff grizzled veteran users of Word or WordPerfect.

#### Self-Reliance

As a lawyer, if you decide to master a single program, it should be the word processor. The standard procedure of: dictation, transcription, edit/modify, enter corrections, edit/modify, enter corrections is THE most inefficient means possible of producing documents. It may be the way it's been done for years, but it's still extremely

inefficient. The only less efficient method would be to write the first draft out long-hand on legal pads instead of dictating it. Anyway, be self-reliant and fast, and you'll get a lot more done, you'll bill more hours and you'll reduce your costs. If you're working for yourself, wait until you realize how much it costs to hire someone to type things for you. You'll be inspired.

## Reduction in Malpractice Risk

Forgotten metadata or one little undetected typo in a legal document can mean bad results for your client and malpractice claims. Understanding the word processor's built in automation and document assembly features can significantly reduce the chances of these things happening to you.

## UNFORTUNATELY, PRACTICE DOES NOT MAKE PERFECT

### Two Important Facts About Microsoft Word

**Fact 1:** 100% of the formatting problems you've experienced when drafting new documents can be completely avoided before they occur.

**Fact 2:** When editing a document someone else drafted, any formatting glitches can be resolved in just a few clicks, no matter how bad of a mess it is.

Unfortunately, the foregoing facts are true only if you have mastered Word.

If instead you feel like every complex document turns into a wrestling match, don't feel bad. Only a tiny percentage of users have actually achieved Word domination. In my decades of experience, even people who feel they know what they are doing with Word have almost always misdiagnosed themselves. The ability to beat text into submission via formatting work-arounds and hacks does not indicate that one knows how to skillfully use Word. Word should be doing the work for the user, not the other way around.

### Why Word Is Frustrating

Most users find Word to be pretty frustrating when drafting or editing documents with complex formatting. This is because many of Word's most important features are either concealed or nearly impossible to figure out without research and training. For example, assume you drafted a contract containing headings/titles and you do not want page breaks to separate your headings from the paragraphs that follow them. Further, you have a signature line and acknowledgment at the end which you would like to keep together on a single page not separated by page breaks. There are features in Word which will take care of this for you automatically, but good luck finding them. No button on any tab or ribbon will help you. You just have to *know* to right-click the relevant paragraph or heading → choose **Paragraph** → click the **Line and Page Breaks Tab** → check "**Keep with next**" and/or "**Keep lines together**" as appropriate. There are many Word features like this.

For another example, the most important feature one must understand in Word is styles; and nothing in Word's interface indicates this. Clicking around in Word will not reveal what styles are, how they work, or how to control them. Word's (fairly useless) built in help sheds little light on the subject. I can give you all of the steps to construct a 5-level deep, auto-paragraph numbered outline that works perfectly in every situation thanks to Styles. However, you can use Word every day for the rest of your life and not stumble upon those steps or discover what they are by accident. Having said that, Styles are definitely not difficult or illogical. To the contrary, they're a wonderful formatting tool, they allow you to completely control font and paragraph formatting in your documents, and they behave predictably in all situations. It's just that they're not easily mastered simply by using Word; and Word's interface conveys no hint of their importance.

## How To Achieve Word Enlightenment

In my experience, Word proficiency is only built by working through a comprehensive manual (of course, no printed manuals accompany the program) or taking hands-on classes. Most people would rather clean toilets than read software manuals, but you have to keep in mind that not all classes are created equal. The critical issue is that legal professionals need to understand word processor functionality that most people have no use for. For example, we need to master automatic paragraph numbering, outline numbering, and auto-updating tables of contents, tables of authority and paragraph cross references. We need to know how to turn page numbering on and off in the middle of a document, start it over, and switch from romanettes to Arabic and back again. We need to understand how footnotes and endnotes work, when section breaks are necessary and how to control Styles. These are precisely the kind of features ignored in Word classes designed for the general public. So it is important to find legal-specific training which will address these issues.

## Word Processing Is Complicated So Training Is Required

The fact that mastering Word requires training isn't the problem. The problem is that most people don't expect a word processor to be that complicated. There's a general assumption that simply using the program over time will increase one's skill with it. I'm here to tell you that this assumption is patently false when it comes to Word. For example, I ran a quick search on [www.amazon.com](http://www.amazon.com) for Word 2013 manuals. Microsoft Word 2013 (Signature Series) by Rutkosky and Roggenkamp is 1,152 pages; Word 2013 Bible by Bucki is 1,056 pages; and Word 2013 In Depth by Wempen is 1,008 pages. The page counts alone would indicate that there's a lot more going on here than most people expect.

For years, I've heard experienced Word users complain that Word can't do this and can't do that. I always ask those complaining if they've ever read a whole manual on Word or taken a hands-on class. Invariably, the answers are no. When I demonstrate how easily one can do all of the things they were complaining about, they often look at me like I just pulled off some kind of David Copperfield magic trick. Once you learn how the program works, it's not complicated (and I'm no magician). Ultimately, you can't complain about the politicians if you don't vote; and you can't gripe about the technology if you don't attempt to educate yourself. The thing to remember with Word is that practice does not make perfect unless you know what to practice; and simply using the program won't reveal it.