



Affinity
INSIGHT

MICROSOFT WORD for LEGAL PROFESSIONALS

Covering Word for Windows Versions
2010, 2013, 2016, 2019 and Microsoft 365



MICROSOFT WORD

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

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Mac users: If you are using this manual with Word for Mac, some of the steps will be different. Further, some features available in Word for Windows are not available in Word for Mac.

The materials in this book were written using Microsoft 365 and all steps and instructions were tested prior to the publication date. As Microsoft continuously updates Microsoft 365, your software experience may vary slightly from what is seen in this manual.

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MEET OUR TEAM OF WORD EXPERTS

Meet our team of Word experts who have co-authored this manual.



BARRON HENLEY

Most people wouldn't relish the idea of spending a day in a conference room, teaching Microsoft Word. Barron is not most people. There are few things Barron enjoys more than teaching all-day Word training classes.

Barron has helped hundreds of organizations transition from Corel WordPerfect to Word. From training to converting documents, he does it all. Few people understand both WordPerfect and Word as well as Barron does.

As an attorney, he understands how challenging it is to practice law without the proper training on the technology tools. When Barron isn't training people on Word or helping transition organizations transition from WordPerfect, he focuses on automating documents and teaching CLE classes for attorneys across North America.

JOHN FEDERICO

With a drive to make software bend to his will, John pushes the limits of what Word can do with custom ribbons, complex macros, and automation. His experience practicing law taught him the value of improving document drafting efficiency.

When John isn't working in Word directly, he focuses on automating complex documents with document automation software. He's passionate about creating a simple user interface, reducing the amount of data entry required to generate complex documents. Never one to back down from a challenge, John will find a way to make anything happen.



DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.



MICROSOFT WORD FOR LEGAL PROFESSIONALS

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25 PAGE FORMATTING (SECTIONS PART 1)

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

NON-SECTION BREAKS

Types of Non-Section Breaks

There are several types of non-section breaks in Word:

- Soft Page Break:**Inserted automatically when you have entered enough text to fill the page.
- (Hard) Page Break:**.....Inserted manually (Ctrl + Enter) to force the start of a new page.
- Column Break:**.....Forces the start of a new column (newspaper style)
- Text Wrapping Break:**Ends the current line and forces the text to continue below a picture, table or other item.

How to Insert a General Break

Go to the **Layout ribbon** → **Page Setup group** → **Breaks button**. The following will appear:

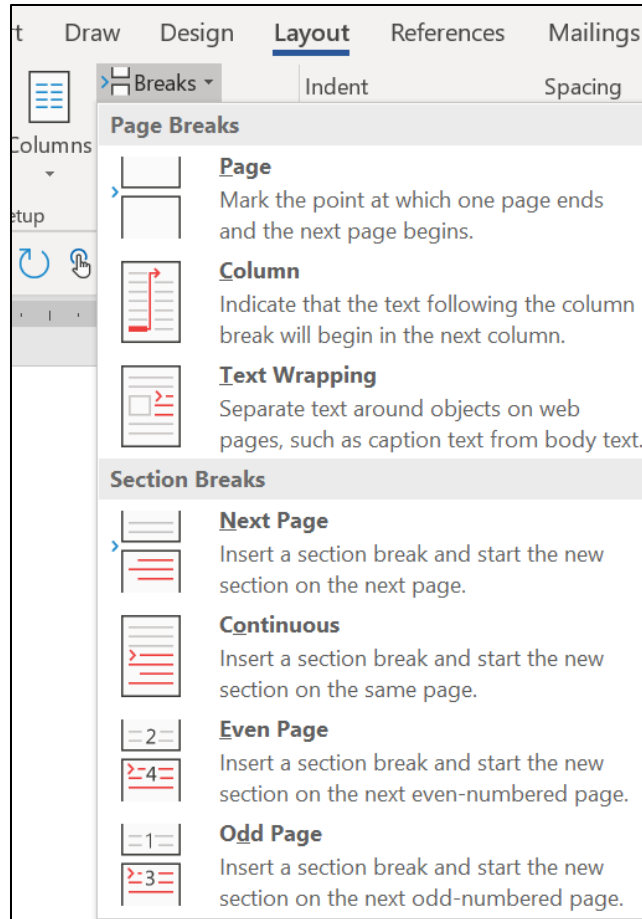



FIGURE 25-1

SECTION BREAKS

In General

A document can be broken into separate sections by inserting Section Breaks into the text. Think of section breaks as invisible fences around sections of your document (you can see them if you click the **Home ribbon** → **Paragraph group** → **Show/Hide button**  or if you go to the **View ribbon** → **Document Views group** (Word 2010) or **Views group** (Word 2013/16/19/365) → **Draft view**. Once the fences are up, you can format the text between the fences differently and the applied formatting will not affect the other sections. If you do not insert section breaks into a document, then the entire document is considered one section.

Section breaks are not the same as page breaks. Page breaks are simply physical breaks between pages in a document. Formatting attributes that can apply to sections include:

- Columns
- Margins
- Paper size
- Page orientation (portrait or landscape)
- Paper source (for printing)

- Line numbering
- Headers and footers

How to Insert a Section Break

To insert a section break, click on **Layout ribbon** → **Page Setup group** → **Breaks button** and choose a type of section break.

Types of Section Breaks

- Next page** (forces a hard page break and starts the new section at the top of the next page)
- Continuous** (new section without breaking the page)
- Even page** (inserts a section break and starts the new section on the next even numbered page)
- Odd page** (inserts a section break and starts the new section on the next odd numbered page)

Multi-Section Documents

Use Section Breaks to create different page numbering and headers & footers in Appellate Briefs (Table of Contents, Memorandum, Appendix).

PAGE SETUP

The **Layout ribbon** → **Page Setup launcher** (see the Launchers paragraph on page 1 above) controls document margins, paper size, orientation and paper source. All of these settings can be applied to the current section, to the entire document (regardless of how many sections there are) or to a designated point forward.

Setting Margins

1. Click the **Layout ribbon** → **Page Setup launcher** → **Margins tab**.
2. Fill in the desired margins.
3. If you want these margins to be set as the default for all your future documents (generated from the normal.dotm template), click the **Set As Default button** in the lower left corner of the dialog box.
4. Click **OK**.

or

Click the **Layout ribbon** → **Page Setup group** → **Margins button**.

Different Margin for the First Page of a Document

Let's assume you want a 2" top margin for the first page and a 1" top margin for all subsequent pages. To accomplish this, follow these steps:

1. Place the cursor at the top of page 1 of your document.
2. Click the **Layout ribbon** → **Page Setup launcher** → **Margins tabs**.
3. Change the top margin to 2" and click **OK**.

4. Now click **Layout ribbon** → **Page Setup group** → **Breaks button** → **Section Break: Continuous**. This creates a 1 line section at the top of the document where your cursor was clicked and the entire rest of the document is section 2.
5. Now click the down arrow key a few times so you're into section 2. Now click the **Layout ribbon** → **Page Setup launcher** → **Margins tab**. Change the top margin for Section 2 back to 1" and make sure **This Section** is selected in the **Apply To dropdown box**. Since the first place Word can make this margin change is the top of page 2, your margins will be correct for the balance of the document.

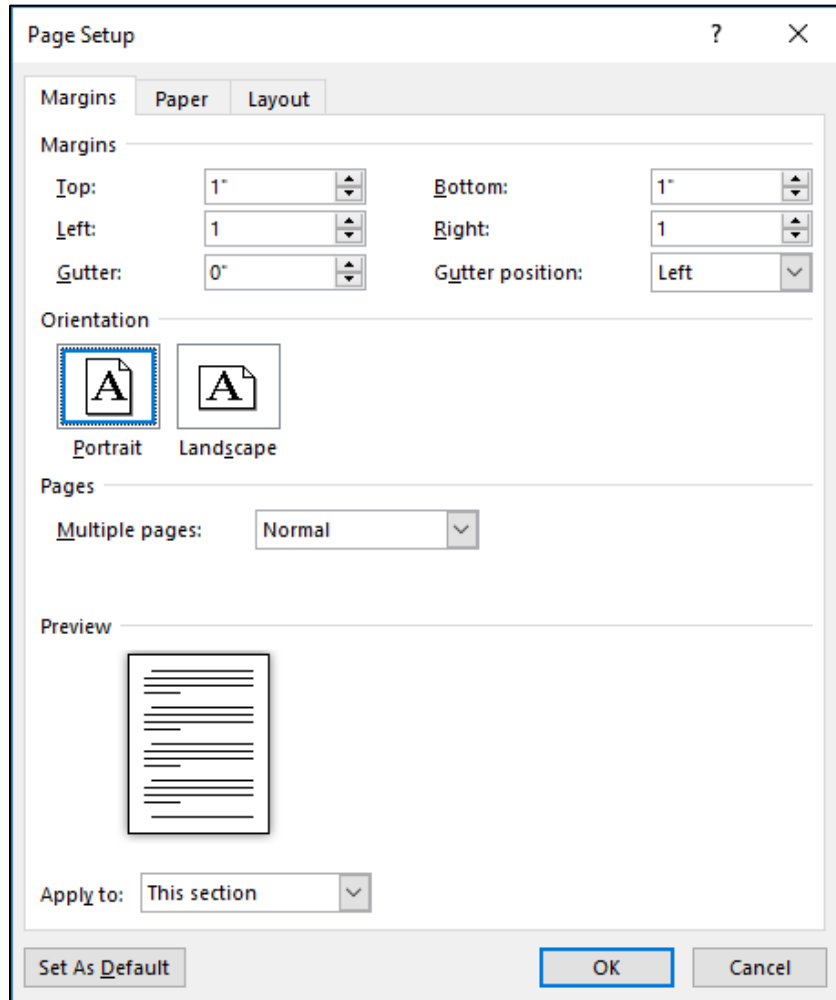


FIGURE 25-2

Orientation

If you want to change the orientation of your document, click **Layout ribbon** → **Page Setup Group** → **Orientation button** → select **Portrait** or **Landscape** or click **Layout ribbon** → **Page Setup launcher** → **Margins tab** → set **Orientation** to **Portrait** or **Landscape**.

Pages

You have the following options for your pages in the **Layout ribbon** → **Page Setup launcher** → **Margins tab**:

- **Normal**: the standard for most legal documents.

- **Mirror Margins:** creates mirror margins on the left and right pages. Used for printing double-sided documents like books or magazines.
- **2 Pages Per Sheet:** useful for folded place cards or handouts.
- **Book Fold:** useful for creating a folded booklet.

Change Paper Size

Click the **Layout ribbon** ➔ **Page Setup launcher** ➔ **Paper tab**. Select from the document types listed in the **Paper size drop down menu**, or manually choose the **Width** and **Height**. Click **OK**. You can also click on the **layout ribbon** ➔ **Page Setup group** ➔ **Size button**.

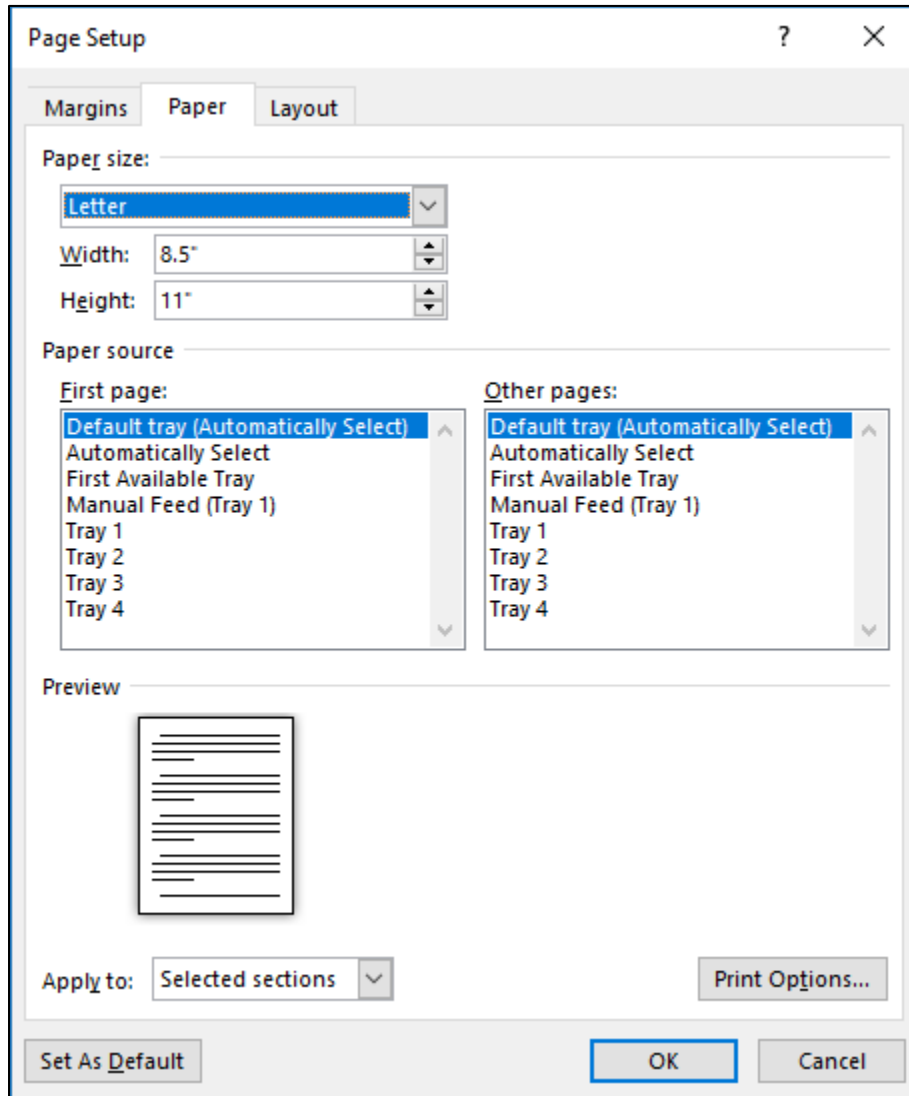


FIGURE 25-3

Setting Up Your Document for Manual Feed

If you would like to automatically print your document from the manual feed tray (for letterhead and the like), click the **Layout ribbon** ➔ **Page Setup launcher** ➔ **Paper tab**. You can choose the **Paper Source** for the **First page** and **Other pages**.

Headers and Footers

The **Layout ribbon** ➔ **Page Setup launcher** ➔ **Layout tab** contains options for controlling **Headers and footers**. These options will be discussed in greater detail later in this section.

Vertical Alignment

Under the **Layout ribbon** ➔ **Page Setup launcher** ➔ **Layout tab** you can now control how text is vertically aligned on a page by clicking the **Page Vertical alignment drop down box** and choosing **Top**, **Center**, **Justified** or **Bottom**.

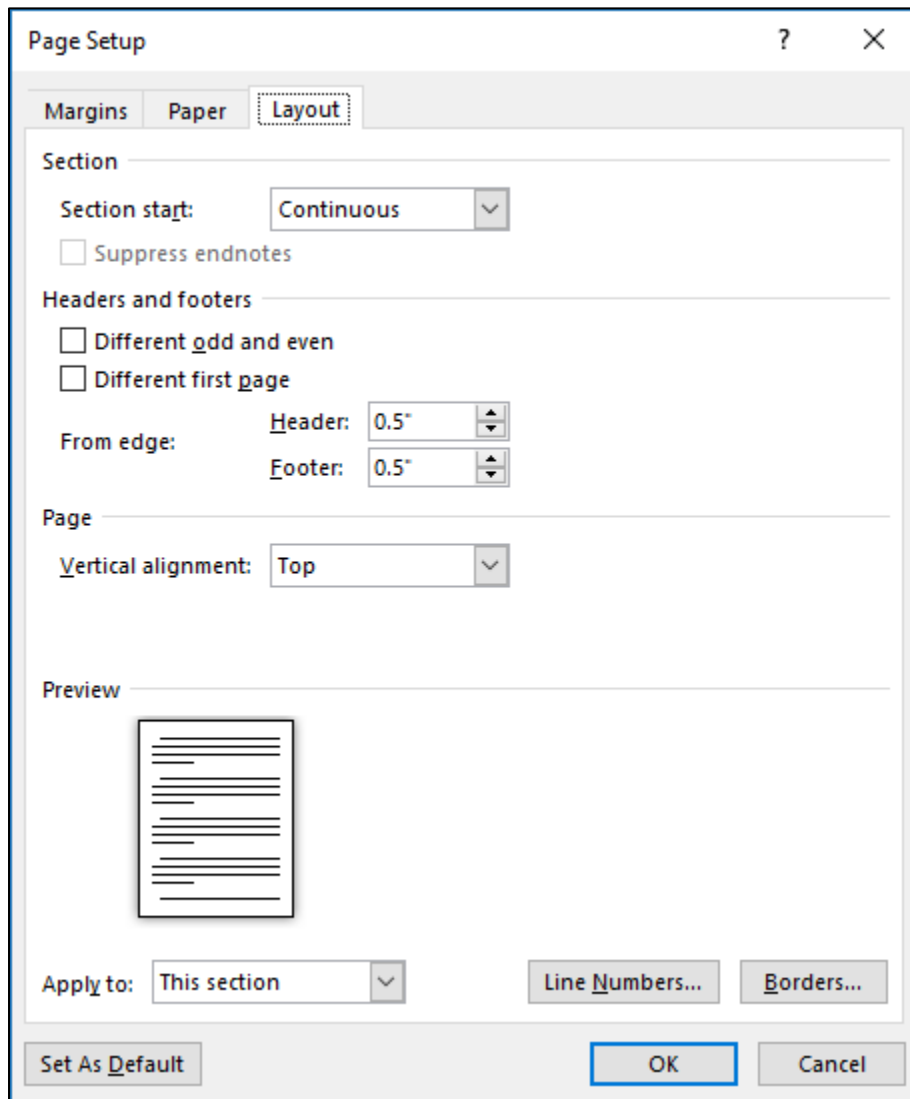


FIGURE 25-4

Line Numbering

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

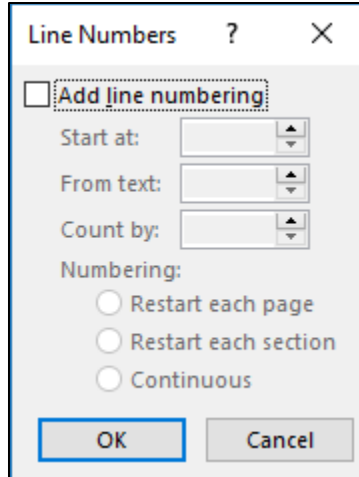


FIGURE 25-5

Borders

The **Borders and Shading dialog** can also be accessed from within the **Layout ribbon** → **Page Setup launcher** → **Layout tab** by clicking on the **Borders...** button.

LEGAL TIP - PRINTING SPECIFIC SECTIONS AND PAGES

- If you want to print the entirety of section 3 of a document (for example), open the print dialog (**File menu** → **Print**) (SK: **Ctrl + P**) and enter the section like this: S3

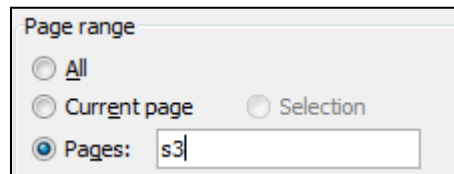


FIGURE 25-6

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

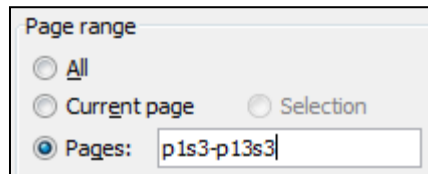


FIGURE 25-7



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At Affinity, we believe that training should be woven into the fabric of a firm's culture—not a one-time event. Our team understands that implementing the right technology is only the first step toward an optimized practice. Realizing your firm's full potential requires an ongoing investment in training.

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