



Affinity
INSIGHT

WORD FOR MAC

for LEGAL PROFESSIONALS

Covering Word for Mac
Version 2016



MICROSOFT WORD FOR MAC

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

©2020 Affinity Consulting Group LLC

ALL RIGHTS RESERVED. No part of this work covered by the copyright herein may be reproduced or distributed in any form or by any means, except as permitted by U.S. copyright law, without the prior written permission of the copyright owner.

Microsoft and the Office logo are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. Affinity Consulting Group LLC is an independent entity from Microsoft Corporation, and is not affiliated with Microsoft in any manner.

The materials in this book were written using Microsoft Office 2016 and all steps and instructions were tested prior to the publication date. As Microsoft continuously updates Office 2016 and Office 365, your software experience may vary slightly from what is seen in this manual.

For training or technology assistance, contact us at Affinity Consulting Group LLC - 614.602.5491 or info@affinityconsulting.com. For permission to use materials from this text or product, submit all requests via email to info@affinityconsulting.com.

This is for your personal use only, you may not distribute, modify, or copy the materials, except for archival or backup purposes, without express permission of the copyright owner.

V 1.03



Invest. Inspire. Empower.

TRAINING



- On-demand training videos
- Software manuals
- Training webinars
- Custom training plans
- On-boarding plans
- Quarterly training reviews

TRAINING

Are you getting the most out of your technology investment? Turn your team into software experts and experience unprecedented gains in productivity and efficiency.

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.

affinityconsulting.com/insight



MEET OUR WORD FOR MAC EXPERT

Meet our Word for Mac expert who authored this manual.



JEFF SCHOENBERGER

An Apple aficionado to his core, Jeff is Affinity's Mac expert. Whether it's understanding the differences between Word for Windows and Word for Mac or giving advice on iOS apps, Jeff has his clients covered. He has a particular affinity for finding Mac-friendly alternatives to software used by Windows-based legal organizations.

When Jeff isn't working with Apple products, he works with bar associations on providing member benefits, including white papers, articles, consulting services, and training resources.

MICROSOFT WORD FOR MAC FOR LEGAL PROFESSIONALS

TABLE OF CONTENTS

TABLE OF CONTENTS

1 KEY FOR USING THIS MANUAL

Ribbons	1
Groups.....	1

2 STOP LETTING WORD ABUSE YOU

With Word, Practice Does Not Make Perfect	3
Benefits of Word Processor Efficiency for Law Offices	4

3 MANAGING DOCUMENTS IN A LAW FIRM

What Is Document Management?.....	6
What Are Files and How Are They Stored?	6
Disk Storage.....	6
Folder Structures	6
Law Firm Rules for Naming Files when Saving	7

4 NEW FILE TYPES AND RELATED ISSUES

Description of the New File Types	9
Benefits of the New File Types	9
Issues the New File Types Create for Lawyers.....	9
What You Can Do About These Issues	10

5 WORD'S "FLUENT USER" INTERFACE

Don't Be Alarmed, This Is a Good Thing.....	12
Our Take On the New Interface	12
What The New Interface Means for Legal Users	12
Word 2016's Basic Interface Terminology	13

6 RECOMMENDED CUSTOMIZATIONS

Quick Access Toolbar - Suggested Law Office Modifications	15
Saving as PDF.....	15
Problems With Word 2016's Default Formatting for Legal Users.....	16

Word's Default Template..... 17

How To Fix Word's Formatting Defaults..... 18

Customize the Status Bar 20

Turn On The Ruler..... 21

How to Create Keyboard Shortcuts 21

7 SIGNIFICANT NEW FEATURES IN WORD 2016

Improved Paste Functionality..... 23

New Navigation Pane..... 23

Simple Markup 23

Reply to Comments 23

Resume Reading 24

Design Ribbon..... 24

Lock Track Changes 24

8 DEFAULT SETTING CHANGES FOR WORD 2016

In General..... 25

Preferences ➔ General 25

Preferences ➔ View..... 26

Preferences ➔ Edit 27

Preferences ➔ Spelling & Grammar 28

Preferences ➔ AutoCorrect 29

Preferences ➔ Save 31

Preferences ➔ Print..... 31

Preferences ➔ Track Changes 32

Preferences ➔ User Information..... 33

Preferences ➔ Security & Privacy..... 34

Preferences ➔ File Locations 35

9 WHERE TO GET HELP WITH WORD

Options For Self Help 36

Call or Email Someone Who Can Help..... 36

Three Golden Rules Legal Users Need to Know..... 36

10 WORD BASICS

File Operations	38
Tip - Selecting More Than One File or Folder at a Time.....	39
Screen Views - Improve or Enhance Document Viewability	39
Viewing Two Sections of the Same Word Document Simultaneously	42
Print and Print Preview	43
Protecting against Lock-Ups and Document Corruption - Legal Tip	45

11 TOOLS FOR DOCUMENT EDITING

Why This Is Important.....	46
Moving Around a Document	46
Undo and Redo Shortcut Keys	46
Insert Text.....	47
Select Text	47
Delete Text	48
Copy, Cut and Paste	48
Legal Tip - Using Go To for Quick Navigation.....	49
Legal Tip - Holding Your Place in Long Documents with Virtual Bookmarks	50
Legal Tip - Finding Text in Your Documents	51
Find and Replace	53

12 PROOFING YOUR WORK

Customizing Spell and Grammar Check	54
Spell Check	55
Useful Reference Web Sites	56
AutoCorrect.....	57
Grammar Check.....	59
Thesaurus.....	59

13 WORD FORMATTING PRINCIPLES

The Microsoft Word Approach to Formatting.....	61
Format Painter.....	62
Wipe Out All Paragraph and Font Formatting	63

14 FONT FORMATTING

Adopting Uniform Standards for Your Firm.....	65
Font Group on the Home Ribbon	65
Symbols.....	65
Other Font Formatting Tips.....	66
Emphasizing Text in a Document.....	67
Non-Breaking Spaces and Hyphens	69

15 PARAGRAPH FORMATTING FUNDAMENTALS

Paragraph Group of the Home Ribbon	70
What Happens when Paragraph Marks Are Deleted	70
Paragraph Alignment	70
Line Spacing.....	70
Automatic Spacing Between Paragraphs	71
Keeping Text and/or Paragraphs Together	71
Automatically Start a Paragraph at the Top of a New Page.....	73
TIP - What To Do If You Experience Bizarre Page Breaks.....	74
Tabs	74
Signature Lines	77
Indents	78
Borders and Shading.....	80

16 PARAGRAPH FORMATTING - PARAGRAPH NUMBERING AND BULLET POINTS

Bullets and Numbering - a Warning.....	83
Bullet Points	83
Single-Level Paragraph Numbering.....	85
Adjust Indents for Bullets and Single-Level Numbered Lists.....	86
Multi-Level Paragraph Numbering.....	87

17 PAGE FORMATTING (SECTIONS PART 1)

Non-Section Breaks.....	92
Section Breaks	93
Page Setup.....	93
Legal Tip - Printing Specific Sections and Pages	97

18 HEADERS, FOOTERS & PAGE NUMBERING (SECTIONS PART 2)

Header and Footer Ribbon.....	99
Create a Header or Footer	99
Our Advice on Page Numbering	99
Page Numbers Manually Inserted into a Header or Footer	100
Insert the Total Number of Pages in the Document	100
Number All Pages Except The First	100
Create Page Numbering within Multi-Section Documents	101
Insert the Total Number of Pages in a Particular Section of the Document	106
Insert the Filename and Path in the Footer of Your Document	107

19 STYLES - THE BASICS

What Are Styles?	109
Word Uses Styles Whether You Want Them or Not	109
Two Formatting Approaches in Word	109
Advantages of Styles.....	110
Types of Styles	110
All-Important Rules of Styles.....	111
Default Style	114
Changing the Font For the Entire Document.....	116
Using Existing Styles.....	118
Create and Apply New Styles	118
Modify an Existing Style	120
Using Styles	120
Copy Existing Styles Into Documents You're Working On	121

20 STYLES - ADVANCED

The Key to Success.....	124
Tips and Things to Remember before We Get Started	124
STEP 1 - Modify the Heading Styles or Create Your Own	124
STEP 2 - Create Your Outline Numbering	126
STEP 3 - Apply Styles to Your Paragraphs	128
STEP 4 - Subsequent Formatting Changes.....	128
Other Items To Consider	129

21 STYLES GALLERY

Styles Gallery	130
----------------------	-----

22 TABLE OF CONTENTS IN LEGAL DOCUMENTS

Table of Contents - Three Methods	132
Document with Segregated Titles.....	132
Document with Non-Segregated Titles.....	135
Update the Table of Contents.....	140
Formatting the Table of Contents.....	140

23 TABLE OF AUTHORITIES

In General.....	141
Mark the Citations	141
Generate a Table of Authorities Based on Your Marked Citations	142
Page Number Warning.....	142
Editing Table of Authorities Entries by Editing TOA Fields	143

24 CROSS REFERENCING PARAGRAPH NUMBERS

Cross References.....	148
Insert a Cross Reference Using the "Numbered Item" Method	148
Insert a Cross Reference Using the "Bookmark" Method	148
Update Cross References	149

25 REDLINING & PROTECTING ATTORNEY WORK PRODUCT

Negotiating Documents in General	150
Adding Comments	150
Comparing Documents Electronically.....	151
Combining Documents.....	154
Tracking Changes as you Edit.....	155
Prevent Editors from Turning Off "Track Changes"	156
Metadata.....	157
Protecting Confidential Documents - Legal Tip	158

26 AUTOMATE WITH MACROS AND AUTOTEXT CLAUSE LIBRARIES

AutoText	160
----------------	-----

What Are Macros..... 162

When Should I Use a Macro? 162

Where Are Macros Stored? 162

Moving Macros from One Template to Another 162

Record Macros..... 163

If You Make a Mistake while Recording a Macro 163

Play Macros 164

Assigning a Macro To a Keystroke..... 164

Assigning a Macro to a Quick Access Toolbar Button 165

27 TEMPLATES IN GENERAL

Templates Defined 166

Why You Need to Use Templates..... 166

Two Basic Types of Templates 166

Normal Template (Default)..... 167

Working with Templates 168

Creating Templates 169

Using Templates..... 170

Modify a Template..... 170

Sharing Templates..... 170

28 FILLABLE FORM TEMPLATES

What Are Fillable Form Templates?..... 172

Significant Benefits of Fillable Forms..... 172

Create a Form 172

Form Field Descriptions and Uses 174

Advanced Techniques 176

Fill a Form..... 181

Using Fill-In Fields 181

29 MAIL MERGE

When Mail Merge Is Useful..... 183

Steps In a Mail Merge 183

Mail Merge Example 183

30 DE-CONSTRUCT AND RE-BUILD ANY DOCUMENT - NO MATTER HOW BAD IT IS

We've All Been There	185
Step one - Turn On Show Hide	185
Step two - Determine If You Need To Start With a New Document	185
Step three – Copy or Create	186
Step four - Take Notes About What You're Trying To Replicate	186
Step five - Remove Unnecessary Keystrokes	187
Step six - Wipe Out All Font and Paragraph Formatting	190
Step seven - Fix Default Font and Paragraph Settings	190
Step eight - Fix Default Page Settings	192
Step nine - Fix Page Numbering.....	194
Step ten - Delete Any Manually Compiled Reference Tables	194
Step eleven - Build and Apply Styles To Handle Formatting.....	194
Step twelve - Deal with Footnotes.....	195
Step thirteen - Add Paragraph Cross References.....	195
Step fourteen - Generate Tables of Contents and Authorities Properly	195

31 ENVELOPES

Printing an Envelope	197
Changing the Envelope Delivery Address and Return Address Fonts	198

32 ENDNOTES AND FOOTNOTES

Insert a Footnote	200
Edit a Footnote	201
Delete a Footnote	201
Convert Endnotes to Footnotes, or Vice Versa.....	201
To Convert Just One Note.....	201
Force Each Footnote To Stay Together On One Page	202
Change the Footnote Separator Line	202

33 TABLES

What Is a Table?	203
Inserting a Simple Table	203
Basic Editing of a Table.....	203

Sort Data in a Table 205

Convert Text to a Table and Vice Versa 206

Perform Calculations in a Table 206

When Should I Use Tables? 207

34 AUTO NUMBERING (LETTERING) EXHIBITS AND SCHEDULES

Auto-Numbering/Lettering Exhibits or Schedules To A Document 208

Fixing The Caption Style 209

Cross Referencing to Exhibits and Schedules 209

35 WORKING WITH WORDPERFECT FILES

A Word About This Chapter 210

Why Word Users Need To Understand How To Handle WordPerfect Documents 211

Recommended Approach: Word Users Who Occasionally Edit WP Documents 211

Recommended Approach: WP Users Who Occasionally Edit Word Documents 211

Options for Word Users Who Have To Convert WP Documents To Word 212

Problems With The Foregoing Options 213

Recommended Option For You 214

If You Get an Error Opening WP Documents In Word 214

If You Are Switching from WP to Word 215

How To Clean Up A Document Word or WP Converts 215

Formatting Raw Text 218

36 COMMON SPEED KEYS

Speed Keys Commonly Used in Word 219

17 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 (**Cmd + 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, then click on **Break**. The following will appear:

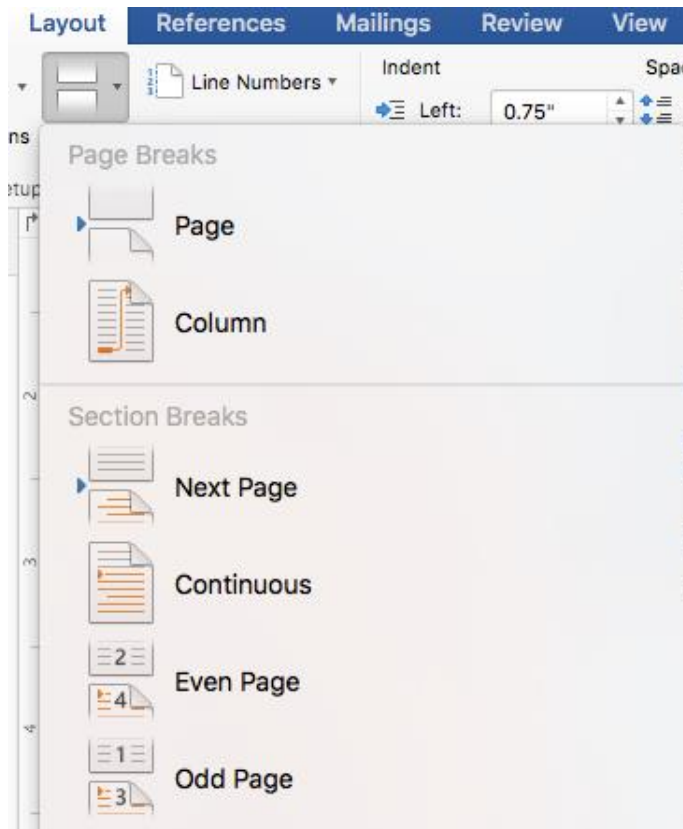


FIGURE 17.1

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 Show/Hide ¶ button ¶ on the **Home** ribbon. 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 **Break** in the **Page Setup** group of the **Layout** ribbon 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 **Page Setup** group in the **Layout** ribbon controls paper size and orientation. 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 **Margins** button in the **Page Setup** group on the **Layout** ribbon

- You can also set the margins directly in the Layout Ribbon
2. Either select the desired margin, or click **Custom Margins**.

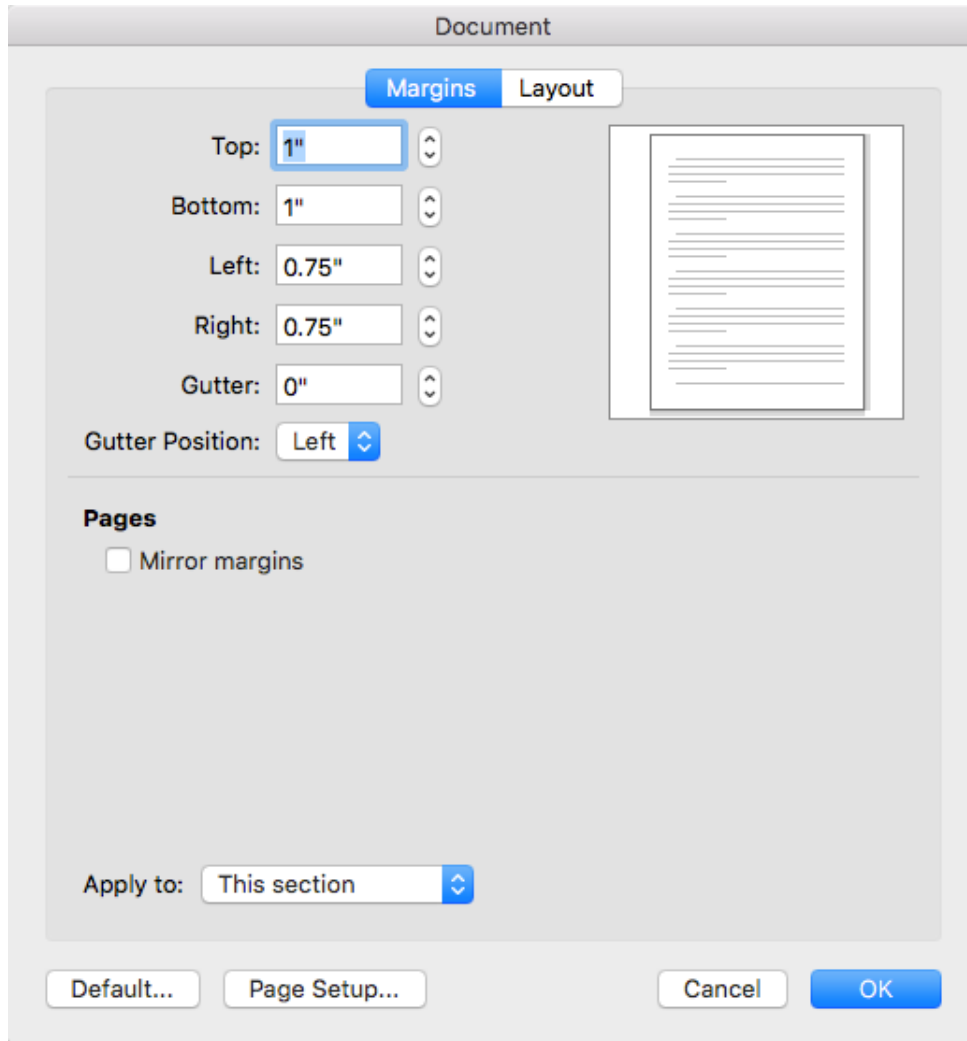


FIGURE 17.2

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 **Default...** button in the lower left corner of the dialog box.

or

4. Click **OK**.

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 **Margins** button in the **Page Setup** group on the **Layout** ribbon.
3. Click on **Custom Margins**.
4. Change the top margin to 2" and click **OK**.

5. Now click **Break** ➔ **Continuous** from the **Layout ribbon** right where your cursor is at the top of the document. This creates a 1 line section at the top of the document and the entire rest of the document is section 2.
6. Now click the down arrow key a few times so you're into section 2. Now **Format** ➔ **Document** and change the top margin for Section 2 back to 1" and make sure the **Apply to** drop down is on **This Section**. 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.

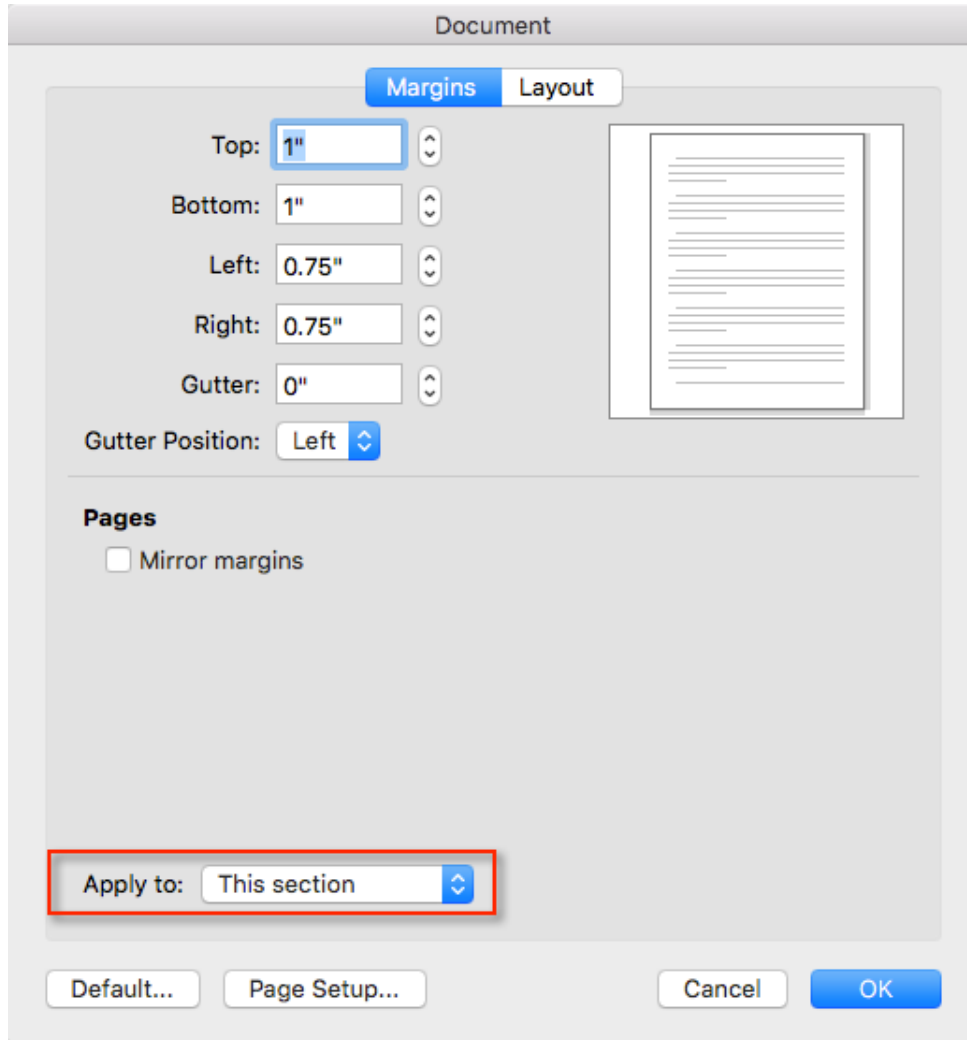


FIGURE 17.3

Orientation

If you want to change the orientation of your document, click **Layout**, then **Orientation**, then **Portrait** or **Landscape**.

Pages

You have the following options for your pages in the **Layout ribbon** ➔ **Page Setup group** ➔ **Margins button**:

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

- **Narrow:** .5" all around.
- **Moderate:** 1" at the top and bottom; .75" on the sides.
- **Wide:** 1" at the top and bottom; 2" on the sides.
- **Mirror Margins:** creates mirror margins on the left and right pages. Used for printing double-sided documents like books or magazines.

Change Paper Size

Click **Format** ➔ **Document**, then **Page Setup**. This dialog lets you manage the paper size and set up custom sizes.

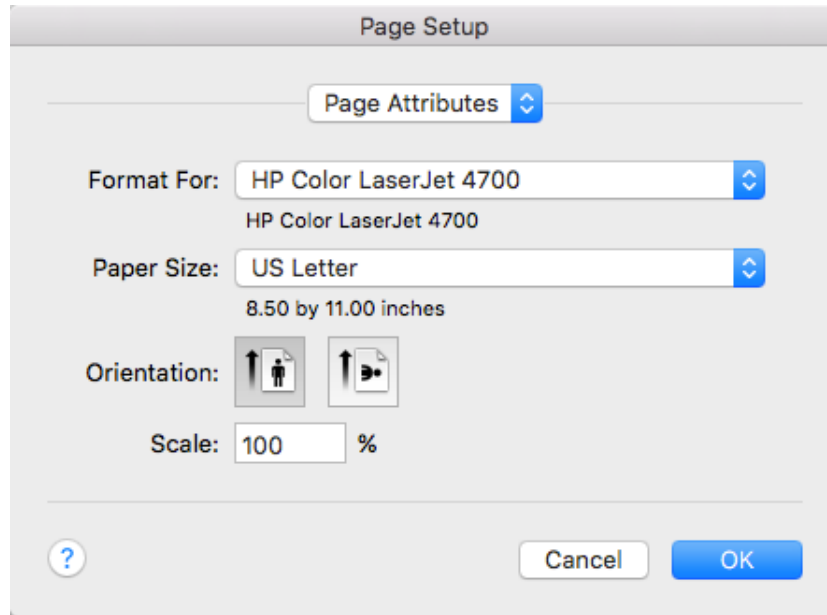


FIGURE 17.4

Headers and Footers

The **Layout** tab of the **Document** dialog (**Format menu** ➔ **Document**) contains options for controlling headers and footers. These options will be discussed in greater detail later in this section.

Vertical Alignment

You can now control how text is vertically aligned on a page by clicking the **Vertical alignment** drop down box on the **Layout** tab of the **Document** dialog and choosing **top**, **center**, **justified** or **bottom**.

Line Numbering

To insert line numbering, click the **Layout** tab on the **Document** dialog and then click the **Line Numbers...** button.

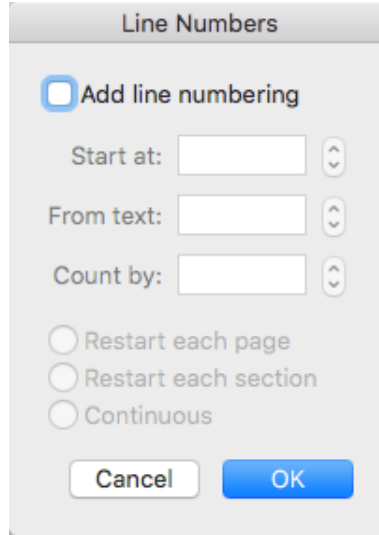



FIGURE 17.5

Borders

The **Borders and Shading** dialog can also be accessed from within the **Format menu** → **Borders and Shading**, or by clicking the down arrow to the right of the **Borders...** button () on the **Home ribbon**, then **Borders & Shading**.

LEGAL TIP - PRINTING SPECIFIC SECTIONS AND PAGES

- If you want to print the entirety of section 3 of a document (for example), press **Cmd + P** → enter the section like this: S3

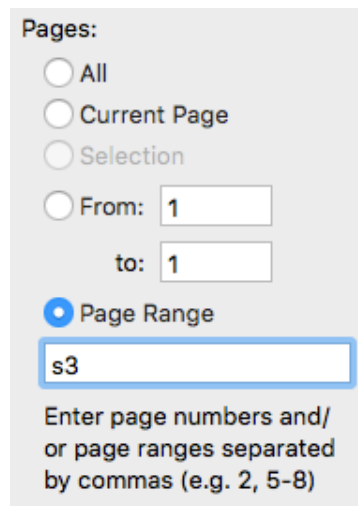


FIGURE 17.6

- 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:

Pages:

All

Current Page

Selection

From:

to:

Page Range

Enter page numbers and/
or page ranges separated
by commas (e.g. 2, 5-8)

FIGURE 17.7



Invest. Inspire. Empower.

On-Site or Webinar | Customized for YOU | Post-Training Support

TRAINING



- **MS Office "What's New"**
- **Microsoft Word**
- **Outlook**
- **Excel**
- **Adobe Acrobat**
- **Nuance Power PDF**
- **Foxit PhantomPDF**
- **Raise-the-Bar Word**
- **WordPerfect Transition**

TRAINING

Are you getting the most out of your technology investment? Turn your team into software experts and experience unprecedented gains in productivity and efficiency.

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.

info@affinityconsulting.com