WORD FOR MAC
FOR LEGAL PROFESSIONALS

Covering Word for Mac
2019, and Microsoft 365

Affinity CONSULTING

MICROSOFT WORD FOR MAC

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

©2021 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 365 and all steps and instructions were tested prior to the publication date. As Microsoft continuously updates Office 2019 and Microsoft 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.

Version 3.01

LEAVE THE TRAINING TO US.

- **Comprehensive digital courses**
- **Affordable membership plans**
- **On-demand training videos**
- **Live training sessions**
- **“Ask the Expert” sessions**
- **Customizable training plans**

Affinity Insight offers insightful training programs created by legal professionals for legal professionals. Our digital courses and training membership plans give you access to some of Affinity’s most dynamic law firm management and legal technology trainers—not just for a day or a week, but all year long. Join live training sessions with your peers or learn at your own pace with bite-sized, on-demand training modules. Design a custom training plan for yourself or everyone in your firm. Learn more at **https://affinityinsight.com**

Affinity 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

CHAPTER 1 KEY FOR USING THIS MANUAL

Ribbons 1

Groups 1

CHAPTER 2 STOP LETTING WORD ABUSE YOU

With Word, Practice Does Not Make Perfect 3

Benefits of Word Processor Efficiency for Law Offices 4

CHAPTER 3 MANAGING DOCUMENTS IN A LAW FIRM

What Is Document Management? 7

What Are Files and How Are They Stored? 7

Disk Storage 7

Folder Structures 8

Law Firm Rules for Naming Files when Saving 9

CHAPTER 4 CURRENT FILE TYPES AND RELATED ISSUES

Description of the New File Types 10

Benefits of the New File Types 10

Issues the New File Types Create for Lawyers 11

What You Can Do About These Issues 11

CHAPTER 5 WORD'S "FLUENT USER" INTERFACE

Don't Be Alarmed, This Is a Good Thing 13

Our Take On the New Interface 13

What The New Interface Means for Legal Users 13

Word's Basic Interface Terminology 14

CHAPTER 6 RECOMMENDED CUSTOMIZATIONS

Quick Access Toolbar - Suggested Law Office Modifications 17

Saving as PDF 19

Problems With Word's Default Formatting for Legal Users 19

Word's Default Template 20

How To Fix Word's Formatting Defaults 21
Customize the Status Bar 24
Turn On The Ruler 25
How to Create Keyboard Shortcuts 25

CHAPTER 7 SIGNIFICANT NEW FEATURES IN WORD

Improved Paste Functionality 27
New Navigation Pane 27
Simple Markup 28
Reply to Comments 28
Resume Reading 28
Design Ribbon 28
Lock Track Changes 28

CHAPTER 8 DEFAULT SETTING CHANGES FOR WORD

In General 29
Preferences → General 29
Preferences → View 30
Preferences → Edit 32
Preferences → Spelling & Grammar 33
Preferences → AutoCorrect 34
Preferences → Save 36
Preferences → Print 37
Preferences → Track Changes 38
Preferences → User Information 39
Preferences → Security & Privacy 40
Preferences → File Locations 41

CHAPTER 9 WHERE TO GET HELP WITH WORD

Options For Self Help 42
Call or Email Someone Who Can Help 42
Three Golden Rules Legal Users Need to Know 42

CHAPTER 10 WORD BASICS

File Operations 45
Tip - Selecting More Than One File or Folder at a Time 46

Screen Views - Improve or Enhance Document Viewability 46
Viewing Two Sections of the Same Word Document Simultaneously 49
Print and Print Preview 50
Protecting against Lock-Ups and Document Corruption - Legal Tip 52

CHAPTER 11 TOOLS FOR DOCUMENT EDITING

Why This Is Important 53
Moving Around a Document 53
Undo and Redo Shortcut Keys 54
Insert Text 54
Select Text 54
Delete Text 55
Copy, Cut and Paste 55
Legal Tip - Using Go To for Quick Navigation 57
Legal Tip - Holding Your Place in Long Documents with Virtual Bookmarks 57
Legal Tip - Finding Text in Your Documents 58
Find and Replace 60

CHAPTER 12 PROOFING YOUR WORK

Customizing Spell and Grammar Check 61
Spell Check 62
Useful Reference Web Sites 63
AutoCorrect 64
Grammar Check 67
Thesaurus 67

CHAPTER 13 WORD FORMATTING PRINCIPLES

The Microsoft Word Approach to Formatting 69
Format Painter 71
Wipe Out All Paragraph and Font Formatting 72

CHAPTER 14 FONT FORMATTING

Adopting Uniform Standards for Your Firm 73
Font Group on the Home Ribbon 73
Symbols 73
Other Font Formatting Tips 74

Emphasizing Text in a Document 76
Non-Breaking Spaces and Hyphens 78

CHAPTER 15 PARAGRAPH FORMATTING FUNDAMENTALS

Paragraph Group of the Home Ribbon 79
What Happens when Paragraph Marks Are Deleted 79
Paragraph Alignment 79
Line Spacing 80
Automatic Spacing Between Paragraphs 80
Keeping Text and/or Paragraphs Together 81
Automatically Start a Paragraph at the Top of a New Page 83
TIP - What To Do If You Experience Bizarre Page Breaks 83
Tabs 83
Signature Lines 86
Indents 87
Borders and Shading 89

CHAPTER 16 PARAGRAPH FORMATTING - PARAGRAPH NUMBERING AND BULLET POINTS

Bullets and Numbering - a Warning 91

CHAPTER 17 TO COMPLETELY CONTROL NUMBERED OR BULLETED PARAGRAPHS, YOU NEED TO *LINK* YOUR NUMBERING SCHEME TO "STYLES" IN WORD. A STYLE IS A SET OF FORMATTING CHARACTERISTICS THAT YOU CAN APPLY TO TEXT, TABLES, AND LISTS IN YOUR DOCUMENT TO QUICKLY CHANGE THEIR APPEARANCE. WHEN YOU APPLY A STYLE, YOU APPLY A WHOLE GROUP OF FORMATS AT ONCE. LINKING NUMBERS AND STYLES ALLOWS YOU TO SIMULTANEOUSLY CONTROL THE FORMATTING OF THE NUMBER/LETTER AND THE FORMATTING OF THE PARAGRAPH THAT FOLLOWS THE NUMBER. IF YOU USE BULLETS OR NUMBERING IN ISOLATION (WITHOUT LINKING THEM TO STYLES), THE ONLY THING YOU CAN CONTROL WITH THE NUMBERING SCHEME IS THE FORMAT OF THE NUMBER ITSELF. TO READ MORE ABOUT STYLES, SEE CHAPTER 1 -

Bullet Points 95
Single-Level Paragraph Numbering 96

Adjust Indents for Bullets and Single-Level Numbered Lists 98
Multi-Level Paragraph Numbering 99

CHAPTER 18 PAGE FORMATTING (SECTIONS PART 1)

Non-Section Breaks 104
Section Breaks 105
Page Setup 106
Legal Tip - Printing Specific Sections and Pages 110

CHAPTER 19 HEADERS, FOOTERS & PAGE NUMBERING (SECTIONS PART 2)

Header and Footer Ribbon 112
Create a Header or Footer 112
Our Advice on Page Numbering 112
Page Numbers Manually Inserted into a Header or Footer 113
Insert the Total Number of Pages in the Document 113
Number All Pages Except The First 113
Create Page Numbering within Multi-Section Documents 114
Insert the Total Number of Pages in a Particular Section of the Document 120
Insert the Filename and Path in the Footer of Your Document 121

CHAPTER 20 STYLES - THE BASICS

What Are Styles? 122
Word Uses Styles Whether You Want Them or Not 122
Two Formatting Approaches in Word 122
Advantages of Styles 123
Types of Styles 124
All-Important Rules of Styles 124
Default Style 128
Changing the Font For the Entire Document 130
Using Existing Styles 132
Create and Apply New Styles 132
Modify an Existing Style 134
Using Styles 134
Copy Existing Styles Into Documents You're Working On 135

CHAPTER 21 STYLES - ADVANCED

The Key to Success 138
Tips and Things to Remember before We Get Started 138

CHAPTER 22 USING "HEADING" STYLES DOESN'T MEAN THAT THESE STYLES SHOULD ONLY APPLY TO THE HEADINGS. FOR EXAMPLE, IF MY PARAGRAPHS LOOK LIKE THE ONE BELOW, IN ALMOST EVERY CASE, I WOULD APPLY HEADING 2 TO THE ENTIRE PARAGRAPH 1.1. (NOT JUST THE WORD FORMATION). HOWEVER, IF I WANTED TO AUTOMATICALLY PULL OUT A TABLE OF CONTENTS AND ONLY INCLUDE "1.1. FORMATION" IN IT (AND NOT THE REST OF THE PARAGRAPH), THEN I WOULD ONLY APPLY HEADING 2 TO THE WORD FORMATION. THIS PROCESS IS DESCRIBED IN GREATER DETAIL UNDER

STEP 1 - Modify the Heading Styles or Create Your Own 141
STEP 2 - Create Your Outline Numbering 143
STEP 3 - Apply Styles to Your Paragraphs 144
STEP 4 - Subsequent Formatting Changes 144
Other Items To Consider 145

CHAPTER 23 STYLES GALLERY

Styles Gallery 146

CHAPTER 24 TABLE OF CONTENTS IN LEGAL DOCUMENTS

Table of Contents - Three Methods 148
Document with Segregated Titles 148
Document with Non-Segregated Titles 151
Update the Table of Contents 156
Formatting the Table of Contents 156

CHAPTER 25 TABLE OF AUTHORITIES

In General 157
Mark the Citations 157
Generate a Table of Authorities Based on Your Marked Citations 158
Page Number Warning 158
Editing Table of Authorities Entries by Editing TOA Fields 159

CHAPTER 26 CROSS REFERENCING PARAGRAPH NUMBERS

Cross References 165
Insert a Cross Reference Using the "Numbered Item" Method 165
Insert a Cross Reference Using the "Bookmark" Method 165
Update Cross References 166

CHAPTER 27 REDLINING & PROTECTING ATTORNEY WORK PRODUCT

Negotiating Documents in General 167
Adding Comments 167
Comparing Documents Electronically 168
Combining Documents 172
Tracking Changes as you Edit 173
Prevent Editors from Turning Off "Track Changes" 174
Metadata 175
Protecting Confidential Documents - Legal Tip 176

CHAPTER 28 AUTOMATE WITH MACROS AND AUTOTEXT CLAUSE LIBRARIES

AutoText 178
What Are Macros 180
When Should I Use a Macro? 180
Where Are Macros Stored? 180
Moving Macros from One Template to Another 180
Record Macros 181
If You Make a Mistake while Recording a Macro 182
Play Macros 182
Assigning a Macro To a Keystroke 182
Assigning a Macro to a Quick Access Toolbar Button 183

CHAPTER 29 TEMPLATES IN GENERAL

Templates Defined 184
Why You Need to Use Templates 184
Two Basic Types of Templates 184
Normal Template (Default) 185
Working with Templates 186

Creating Templates 187
Using Templates 188
Modify a Template 188
Sharing Templates 188

CHAPTER 30 FILLABLE FORM TEMPLATES

What Are Fillable Form Templates? 190
Significant Benefits of Fillable Forms 190
Create a Form 190
Form Field Descriptions and Uses 192
Advanced Techniques 194
Fill a Form 199
Using Fill-In Fields 199

CHAPTER 31 MAIL MERGE

When Mail Merge Is Useful 201
Steps In a Mail Merge 201
Mail Merge Example 201

CHAPTER 32 DE-CONSTRUCT AND RE-BUILD ANY DOCUMENT - NO MATTER HOW BAD IT IS

We've All Been There 203
Step One - Turn On Show Hide 203
Step Two - Determine If You Need To Start With a New Document 203
Step Three – Copy or Create 204
Step Four - Take Notes About What You're Trying To Replicate 204
Step Five - Remove Unnecessary Keystrokes 205
Step Six - Wipe Out All Font and Paragraph Formatting 208
Step Seven - Fix Default Font and Paragraph Settings 208
Step Eight - Fix Default Page Settings 210
Step Nine - Fix Page Numbering 212
Step Ten - Delete Any Manually Compiled Reference Tables 213
Step Eleven - Build and Apply Styles To Handle Formatting 213
Step Twelve - Deal with Footnotes 213

CHAPTER 33 THERE ARE A COUPLE OF ISSUES AT PLAY WITH FOOTNOTES. IF YOUR ORIGINAL DOCUMENT WAS ONCE A WORDPERFECT DOCUMENT, WHICH WAS CONVERTED TO WORD, THE FOOTNOTES CAN BE A COMPLETE MESS. THE NUMBERING MAY NOT WORK CORRECTLY, THE FOOTNOTES MAY BREAK ACROSS PAGES AND THERE ARE MANY OTHER ISSUES. IF YOU ELECTED TO START OVER AS DESCRIBED ABOVE, THEN THE ACT OF PASTING UNFORMATTED TEXT INTO YOUR NEW DOCUMENT SIMULTANEOUSLY REMOVED *ALL* FOOTNOTES FROM YOUR DOCUMENT. THEREFORE, YOU'LL HAVE TO MANUALLY RE-INSERT THEM BY COPYING THEM FROM THE ORIGINAL DOCUMENT. FOR MORE INFORMATION, SEE CHAPTER 1 -

Step Thirteen - Add Paragraph Cross References 217

Step Fourteen - Generate Tables of Contents and Authorities Properly 217

CHAPTER 34 IF EITHER OR BOTH OF THESE WERE PRESENT IN YOUR ORIGINAL DOCUMENT. INSERT AN AUTOMATICALLY UPDATING TABLE OF CONTENTS BY CLICKING ON REFERENCES RIBBON → TABLE OF CONTENTS GROUP → TABLE OF CONTENTS → CUSTOM TABLE OF CONTENTS... INSERT AN AUTOMATICALLY UPDATING TABLE OF AUTHORITIES BY CLICKING ON REFERENCES RIBBON → TABLE OF AUTHORITIES GROUP → INSERT TABLE OF AUTHORITIES BUTTON. SEE FULL EXPLANATIONS IN CHAPTER 1 -

CHAPTER 35 TABLE OF CONTENTS IN LEGAL DOCUMENTS ON PAGE 142 AND CHAPTER 1 -

CHAPTER 36 ENVELOPES

Printing an Envelope 222

Changing the Envelope Delivery Address and Return Address Fonts 224

CHAPTER 37 ENDNOTES AND FOOTNOTES

Insert a Footnote 226

Edit a Footnote 227

Delete a Footnote 227

Convert Endnotes to Footnotes, or Vice Versa 227

To Convert Just One Note 227

Force Each Footnote To Stay Together On One Page 228

Change the Footnote Separator Line 228

CHAPTER 38 TABLES

What Is a Table? 229
Inserting a Simple Table 229
Basic Editing of a Table 229
Sort Data in a Table 231
Convert Text to a Table and Vice Versa 232
Perform Calculations in a Table 232
When Should I Use Tables? 233

CHAPTER 39 AUTO NUMBERING (LETTERING) EXHIBITS AND SCHEDULES

Auto-Numbering/Lettering Exhibits or Schedules To A Document 234
Fixing The Caption Style 235
Cross Referencing to Exhibits and Schedules 236

CHAPTER 40 WORKING WITH WORDPERFECT FILES

A Word About This Chapter 237
Why Word Users Need To Understand How To Handle WordPerfect Documents 238
Recommended Approach: Word Users Who Occasionally Edit WP Documents 238
Recommended Approach: WP Users Who Occasionally Edit Word Documents 239
Options for Word Users Who Have To Convert WP Documents To Word 239
Problems With The Foregoing Options 240
Recommended Option For You 241
If You Get an Error Opening WP Documents In Word 241
If You Are Switching from WP to Word 242
How To Clean Up A Document Word or WP Converts 242
Formatting Raw Text 245

CHAPTER 41 COMMON SPEED KEYS

Speed Keys Commonly Used in Word 246

CHAPTER 19

HEADERS, FOOTERS & PAGE NUMBERING (SECTIONS PART 2)

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

Header and Footer Ribbon

Whenever you edit a header or footer, the Header/Footer contextual tab and ribbon appear.

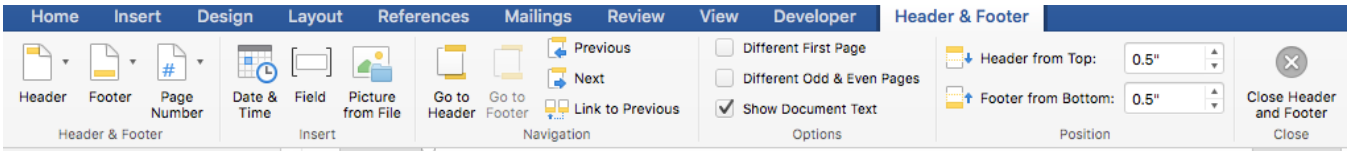

FIGURE 19.1

Create a Header or Footer

1. Click on the page or in the section in which you would like to create a header or footer.
2. On the **Insert** ribbon, click **Footer → Edit Footer**. The Header/Footer ribbon will appear and the header and footer spaces will be outlined with dashed lines.
3. Place your cursor in the appropriate header or footer and type your text. Note that you will not be able to type in the body of document until you close the **Header/Footer ribbon**. You can close the ribbon by double clicking in the body of your document or clicking the **Header/Footer ribbon → Close group → Close Header and Footer button**.

Our Advice on Page Numbering

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 **Page Numbers** button in the **Header & Footer** group on the **Insert** ribbon. The second method is to insert it directly into the header or footer.

Problem With Page Number Button

If you click the **Page Number button → Page Number →** and choose a format, you'll find that doing so will delete anything you had previously typed in the footer or header 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**, 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.

Page Numbers Manually Inserted into a Header or Footer

1. Click the **Insert** ➔ **Header** or **Footer** ➔ **Edit Header** or **Footer**.
2. Put your cursor where you'd like the page number in the header/footer ➔ click on the **Page Number** button.
3. Click the **Close** button to close the Header/Footer Toolbar.

Or

1. Click the **Insert** ➔ **Header** or **Footer** ➔ **Edit Header** or **Footer**.
2. Put your cursor where you'd like the page number in the header/footer ➔ click on the **Insert ribbon** ➔ **Field** ➔ choose the category of **Numbering**, then choose **Page** from the **Field** list.

We recommend the second method because it creates a number that you can directly format and adjust like normal text rather than putting a number inside a text box, which is much harder to manipulate.

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

Insert the Total Number of Pages in the Document

When you're viewing the headers and footers, click the **Insert** menu, select **Field** and choose **NumPages**. Alternatively, you can click on the **Insert ribbon** ➔ **Field** ➔ choose the category of **Document Information**, then choose **NumPages** from the **Field** list.

Number All Pages Except The First

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:

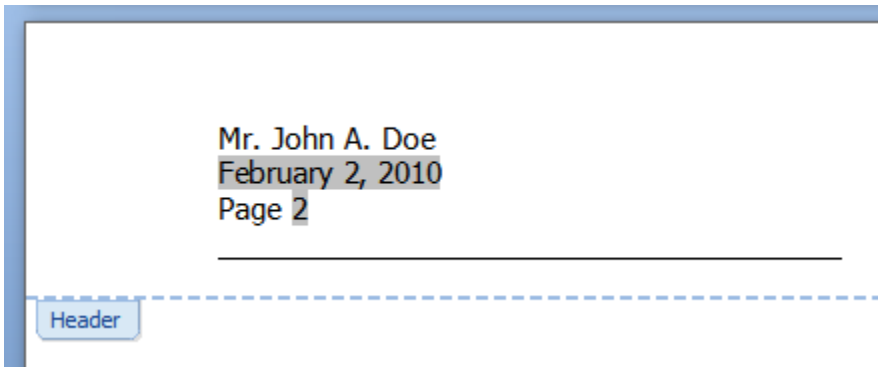

FIGURE 19.2

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:

1. Open the document in Word that you want to page number.
2. Click **Insert** ➔ **Header** or **Footer** ➔ **Edit Footer** ➔ Click in the Footer and hit **Cmd+E** to center your cursor in the footer - now your cursor is in position.
3. While in the Footer, click on the **Insert ribbon** ➔ **Field**, and choose the category of **Numbering**, and the Field of **Page**.
4. 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 ribbon mentioned previously, then check the box **"Different First Page"**.

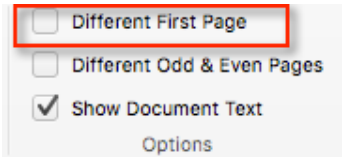

FIGURE 19.3

5. The foregoing step will *remove* the page number from page 1 but leave it on all subsequent pages.
6. Click the **Close Header and Footer button** on the **Header and Footer** ribbon and you're done!

Create Page Numbering within Multi-Section Documents

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.

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:

- **First Page Numbering Rule**: If you don't want to number the first page, then you must click **Format** ➔ **Document** ➔ click the **Layout** tab ➔ check the **Different first page** check box.

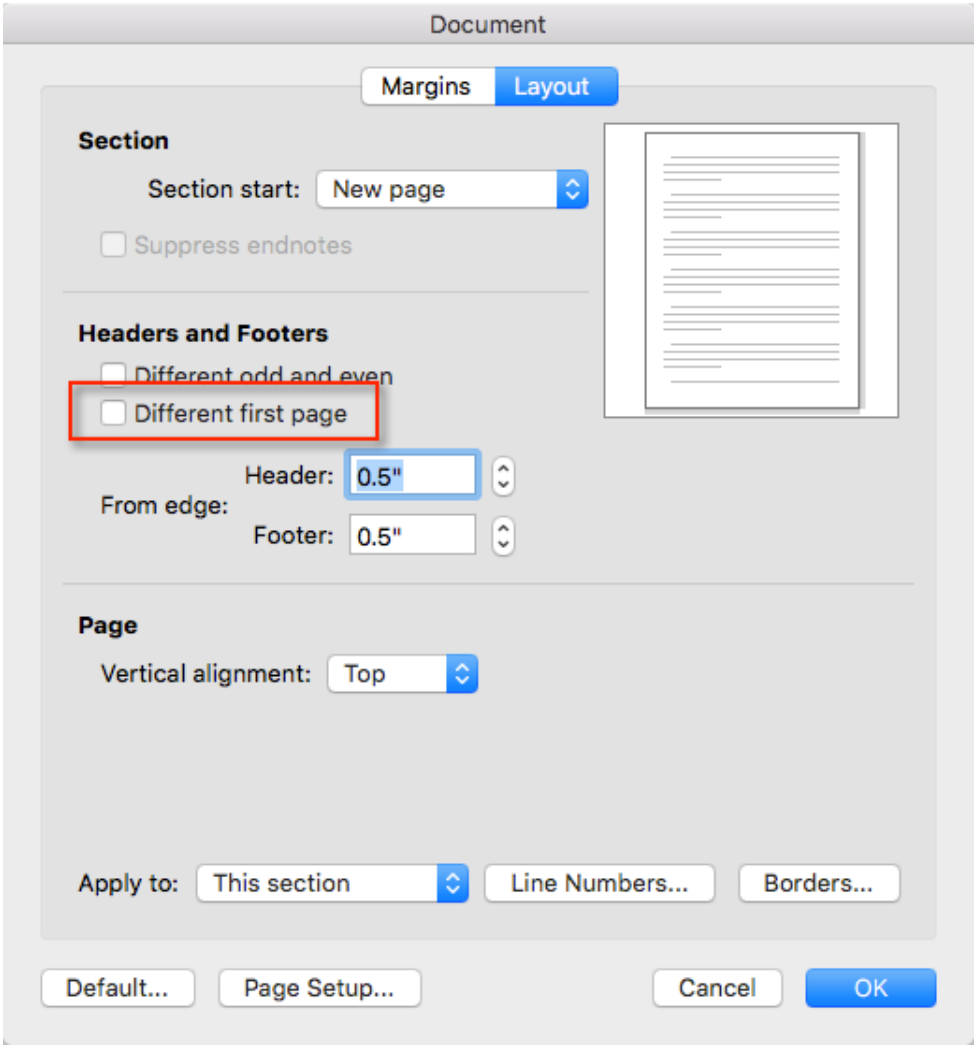

FIGURE 19.4

- **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: L**ayout ribbon** ➔ **Page Setup group** ➔ **Breaks button** ➔ select the type of break you would like to insert. For more information, see Chapter 1.)
- **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:

FIGURE 19.5

- **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 clicking (turning off) the "Link to Previous" button on the Header & Footer Tools ribbon.

FIGURE 19.6

- **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.
- **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.

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:

1. 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.

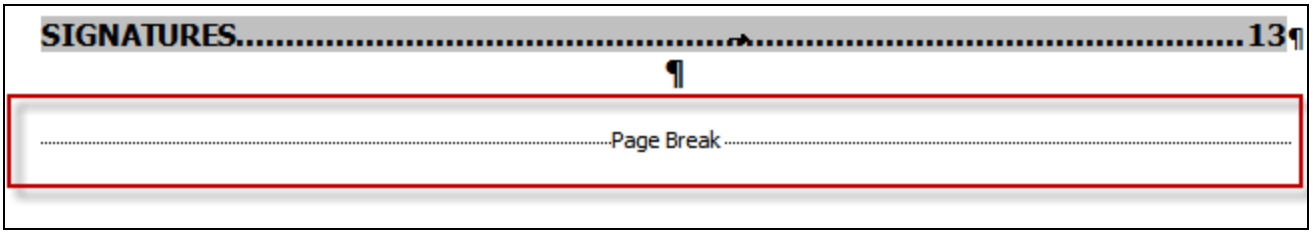

FIGURE 19.7

2. 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.
3. Leave your cursor where it is, then click **Layout ribbon ➔ Break 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.
4. Go to page 1 of your document (hit **Cmd** + **Home**), then click the **Insert menu ➔ Header** or **Footer button ➔** then click in the Footer. You 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.
5. 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-**.
6. 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 Document Elements ribbon.
7. To switch the number from Arabic to small Roman Numerals (i, ii, iii...), click the Format button on the Page Numbers dialog. You can switch to small Roman Numerals with the drop down menu adjacent to **Number format**.

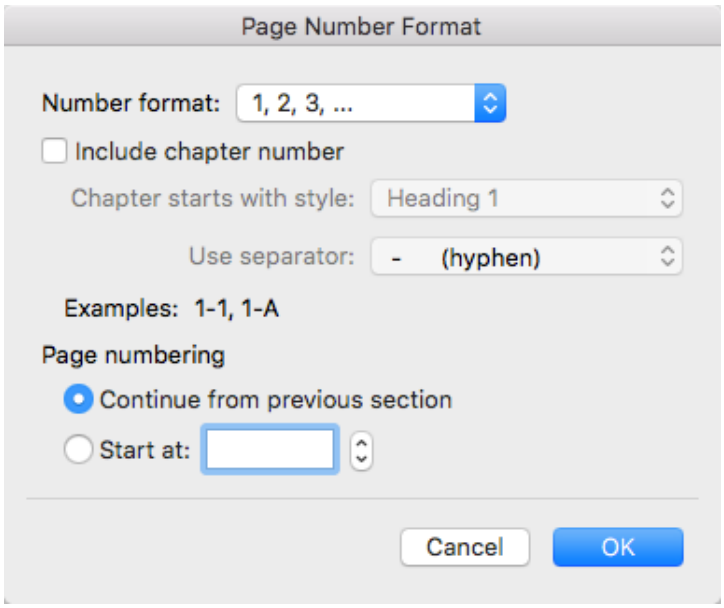

FIGURE 19.8

8. Scroll down to page 2 and you should see that there is a "ii" in the footer of that page. Section 1 is done.
9. 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:

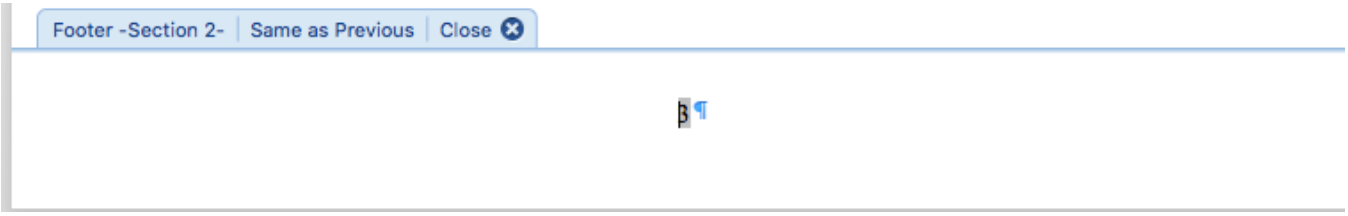

FIGURE 19.9

10. 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 ➔ check the "Different First Page" button. 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.

FIGURE 19.10

11. 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**.

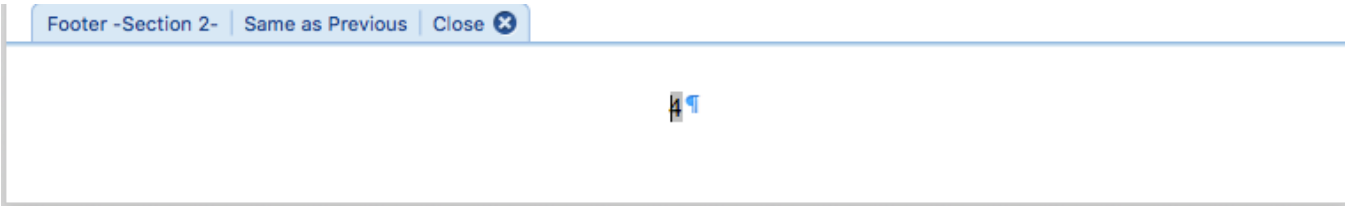

FIGURE 19.11

12. 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.
13. 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.
14. Second, we need to tell Word that we're starting page numbering over again in Section 2. In order to do that, click in the page number itself, then the **Insert menu ➔ Page Numbers button ➔ click Format ➔** click Start at, then OK.

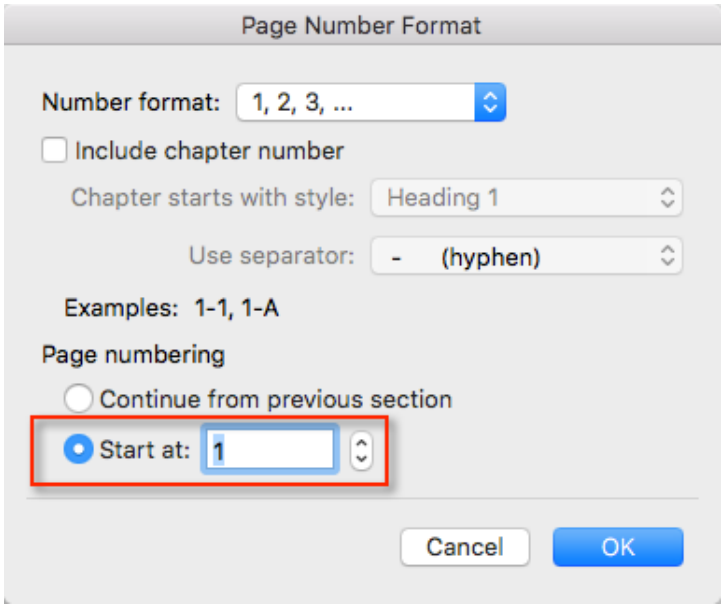

FIGURE 19.12

15. 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.
16. 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, **Insert ribbon ➔ Field**, and choose the category of **Numbering**, and the Field of **SectionPages ➔ OK**:

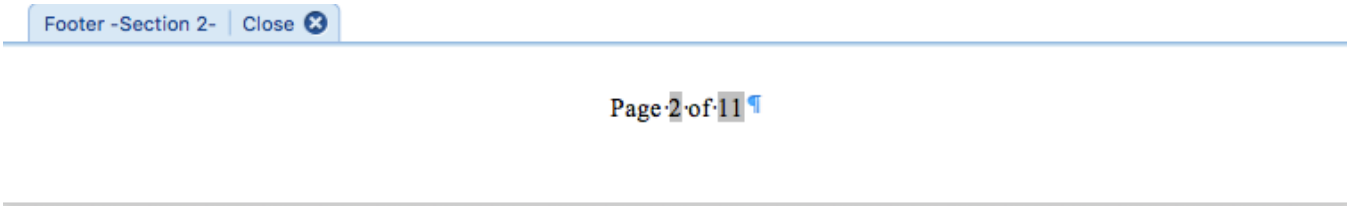

FIGURE 19.13

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

Insert the Total Number of Pages in a Particular Section of the Document

However, if you're in the second section of the document and you want the page numbers to read Page 1 of 5, Page 2 of 5, etc., then you'll need this trick:

1. Position your cursor where you would like to insert the total number of pages in a particular section.
2. Click the **Insert ribbon ➔ Field**, and choose the category of **Numbering**.
3. Under **Field names**, choose **SectionPages** and click **OK**.

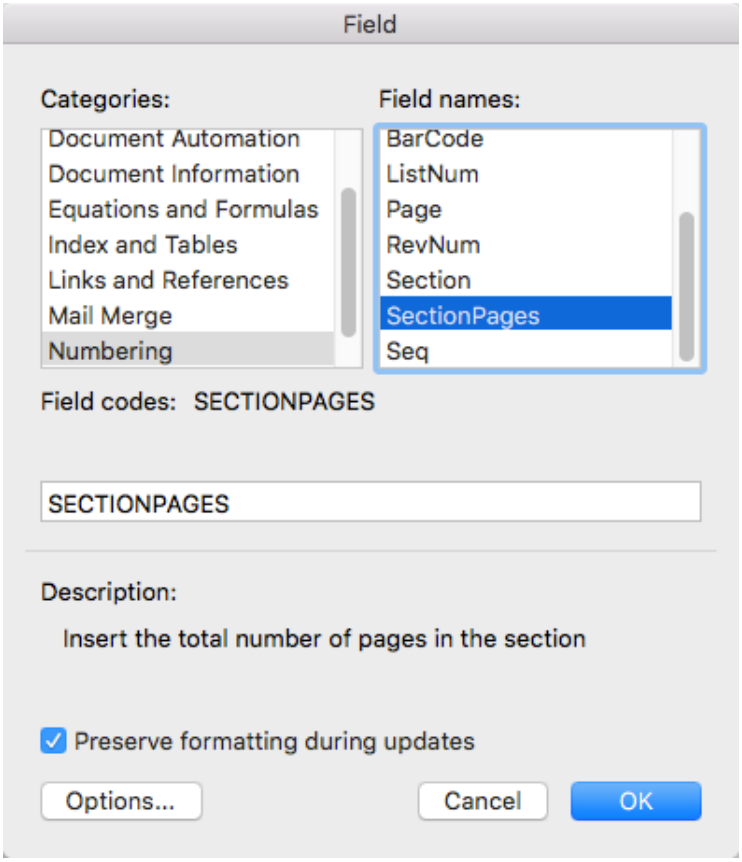

FIGURE 19.14

Insert the Filename and Path in the Footer of Your Document

- Place the cursor in the footer where you would like the path to appear.
- Click the **Insert ribbon → Field**, and choose the category of **Document Information**, the select the field **FileName**. In the dialog that pops up, select Options, then Field Specific Switches. Add "\p" after FILENAME if you want the the path included. Click **OK**.

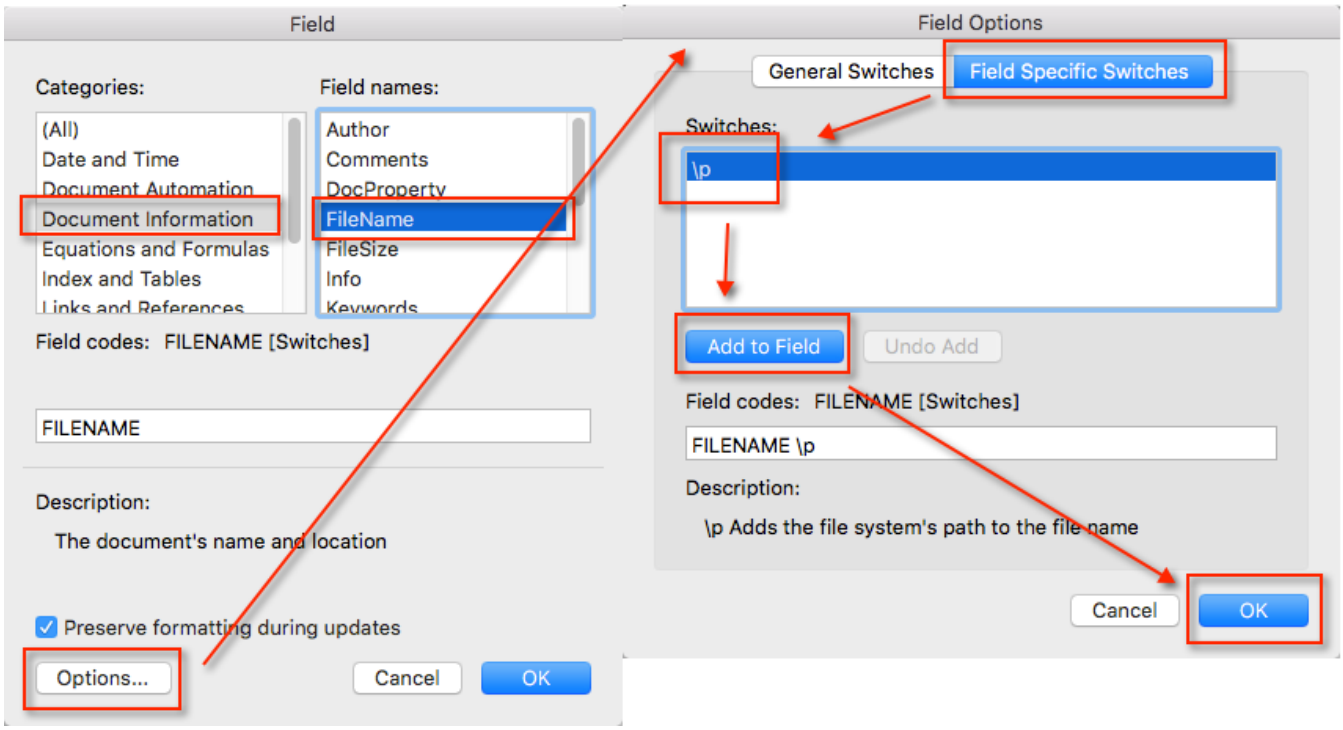

FIGURE 19.15

Add Filename and Path to Last Page Footer (Automatically)

Insert the following field into the footer of a document. Use **Cmd** + **F9** to insert the brackets shown below and type it exactly as shown. Here, underscores represent spaces (there are no actual underscores in the field). This will drop the file and pathname in lower case on ONLY the last page footer.

{_IF_{_PAGE_}_=_{_NUMPAGES_}_"{_FILENAME_*_Lower_\p_*_MERGEFORMAT}"_""}

LEAVE THE TRAINING TO US.

- **Comprehensive digital courses**
- **Affordable membership plans**
- **On-demand training videos**
- **Live training sessions**
- **“Ask the Expert” sessions**
- **Customizable training plans**

Affinity Insight offers insightful training programs created by legal professionals for legal professionals. Our digital courses and training membership plans give you access to some of Affinity’s most dynamic law firm management and legal technology trainers—not just for a day or a week, but all year long. Join live training sessions with your peers or learn at your own pace with bite-sized, on-demand training modules. Design a custom training plan for yourself or everyone in your firm. Learn more at **https://affinityinsight.com**

Affinity INSIGHT