

Microsoft Word *for* Legal Practitioners

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FOREWORD

The modern technology-driven fast-moving legal environment demands from Legal Practitioners to draft, edit and review legal documents on the go.

Many frustrations, which **Word** can solve easily, are experienced.



Frustration

“The client is complaining about spelling errors and poor formatting, while the excellent legal content is overlooked!”.



Frustration

“I am wasting all my time on numbering clauses, checking cross-references and compiling a Table of Contents! I hate Track changes!”

This manual contains:

Word Functions which Legal Practitioners use or will benefit from.



Step by step visual instructions.



Important things to understand from **Word**



Benefit

Benefits from using the magic **Word** offers



Time saver

Time savers



Solution

Solutions to common frustrations



Tool

Handy tools



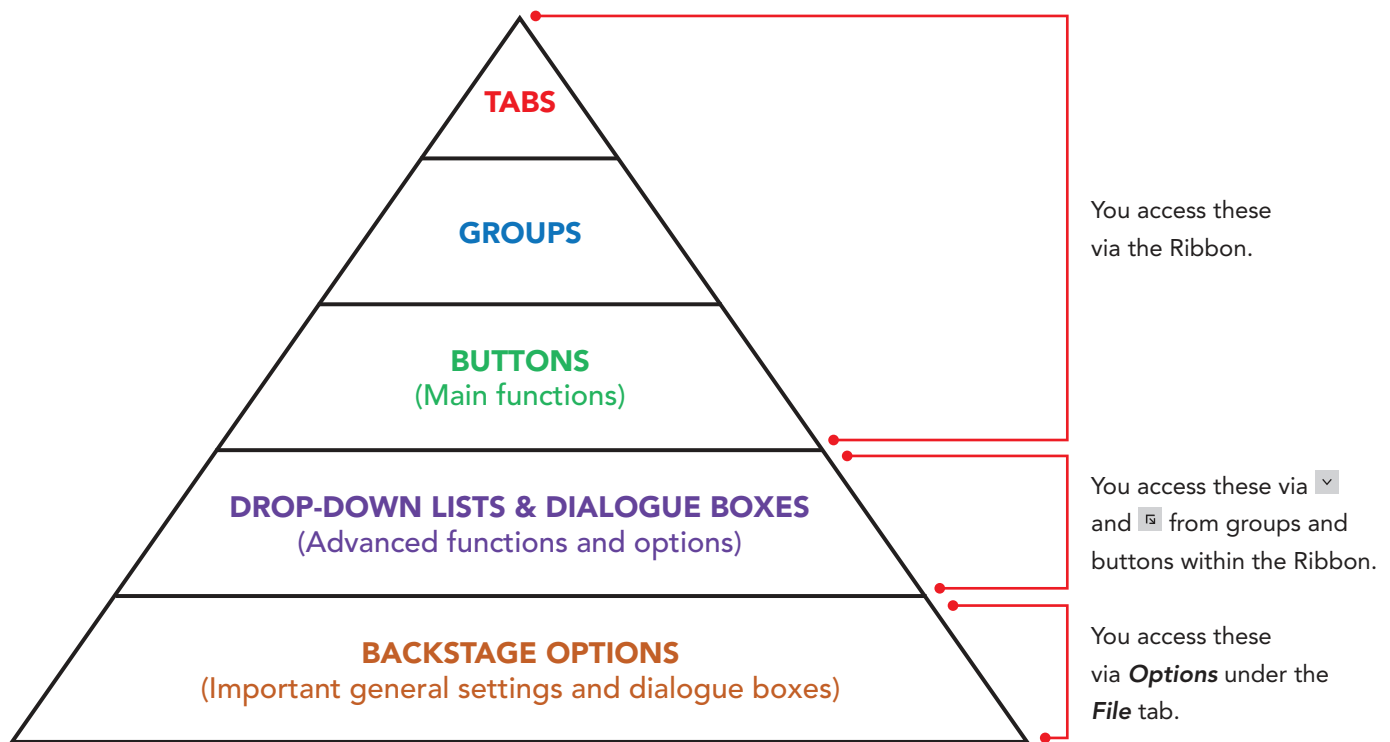
Tips to make drafting, editing and reviewing legal documents a pleasure.

Legal Practitioners will, with the use of this manual, be equipped to draft, edit and review legal documents more easily, quickly, correctly, consistently and professionally.

This manual is based on **Word** 2016, but with a few minor differences can also be used for previous versions of **Word** and on a Mac.

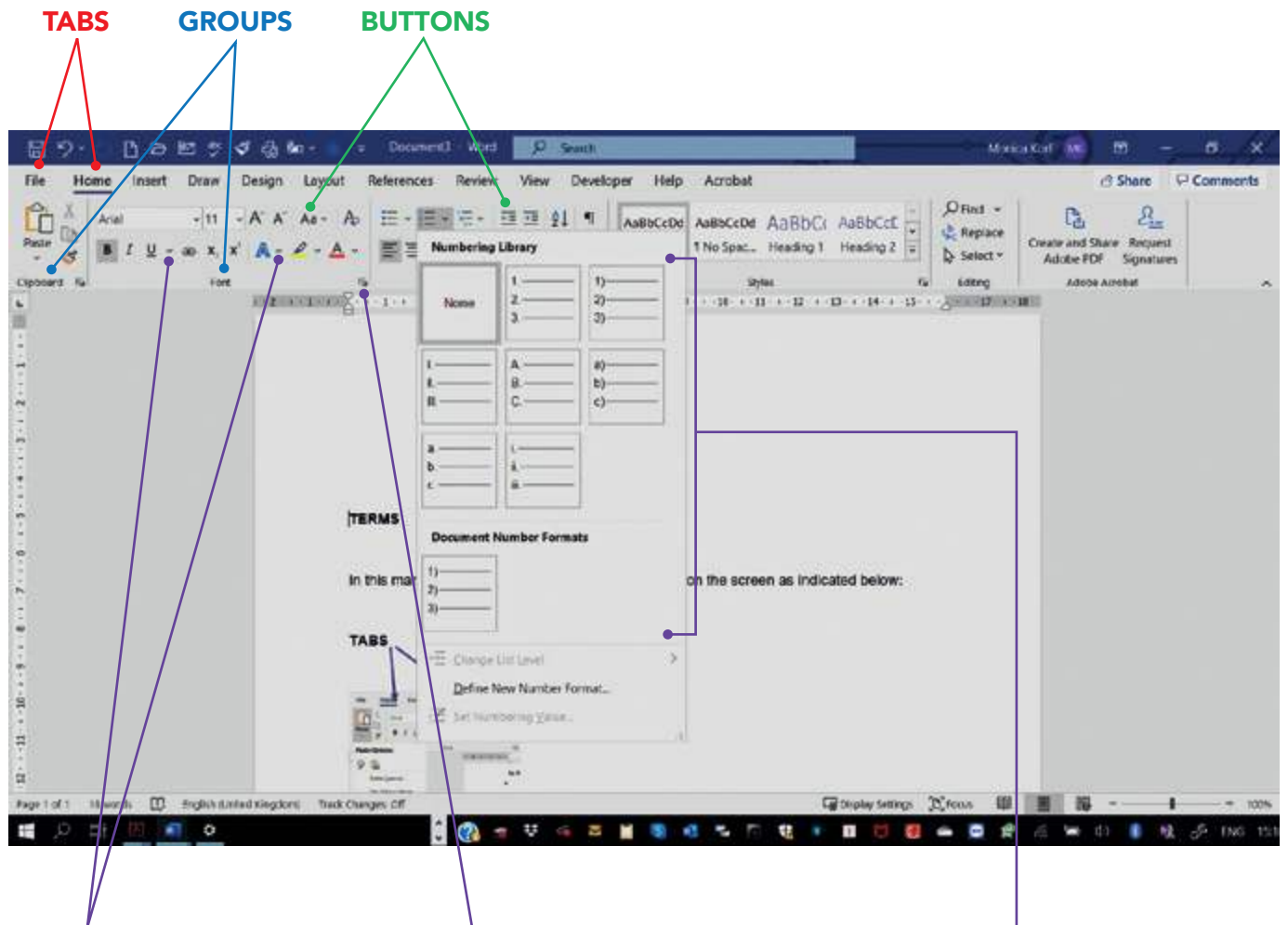
Understanding Word's functions and options

Word consists of different levels of functions and options. The deeper you delve into the application, the more functions and settings you will discover. Here are some of the functions and settings you will encounter as you make your way through this book:



TERMS USED

In this manual, the terms are used as follows:





DROPPDOWN ARROWS and **DIALOGUE BOX LAUNCHER**

Dropdown arrows and dialogue box launchers open up boxes that offer more options.

The extra functions you will find when you click on dropdown arrows and dialogue boxes.

FUNCTIONS: All the nice things Word can do.

KEYS: The squares you hit on your keyboard.

POINTER and **CURSOR:** The  (pointer) and  (cursor) that you move with the mouse or touchpad. The pointer is used to click on buttons, select objects and options, and move items on a page. The cursor shows the position in your text that will be affected when you type on your keyboard. You use your cursor to insert text and to select text that you want to delete or change.

Legal Practitioners need to know which functions they'll find useful and where to find those functions. Here are the tabs, groups, and functions that you will most often use to find what you're looking for.

1.1 The Ribbon

The toolbar that runs across the top of the **Word** screen is known as the Ribbon.



You use the **tabs** on the Ribbon, such as **File**, **Home**, **Insert**, **Layout**, **References**, **Review**, and **View** to access groups of related functions.


Under the **Home** tab, for instance, you will find the **Font**, **Paragraphs**, **Styles**, and **Editing** groups. Each group has its own set of functions and tools.


Tip We will refer to tabs, groups, functions, and tools throughout this manual.

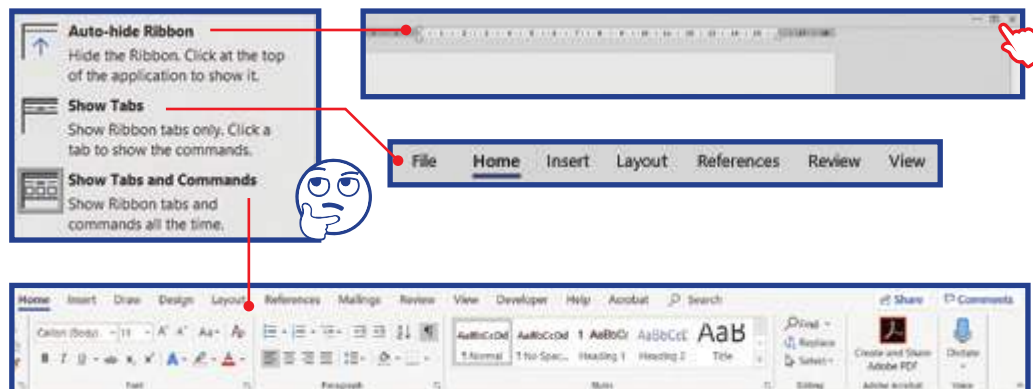



I can't see the Ribbon!

Frustration

Click on the up arrow  button in the upper-right corner of the screen. This displays a dialogue box that you can use to set how the Ribbon displays on the screen. You then choose the option you want.

Tip If you can't see the  click on the three small dots in the upper-right corner of the screen to display it.



Tip Click on the up arrow  in the bottom right corner of the Ribbon to hide the Ribbon.

1.2 Tabs

The tabs covered here contain the targeted functions in this manual.

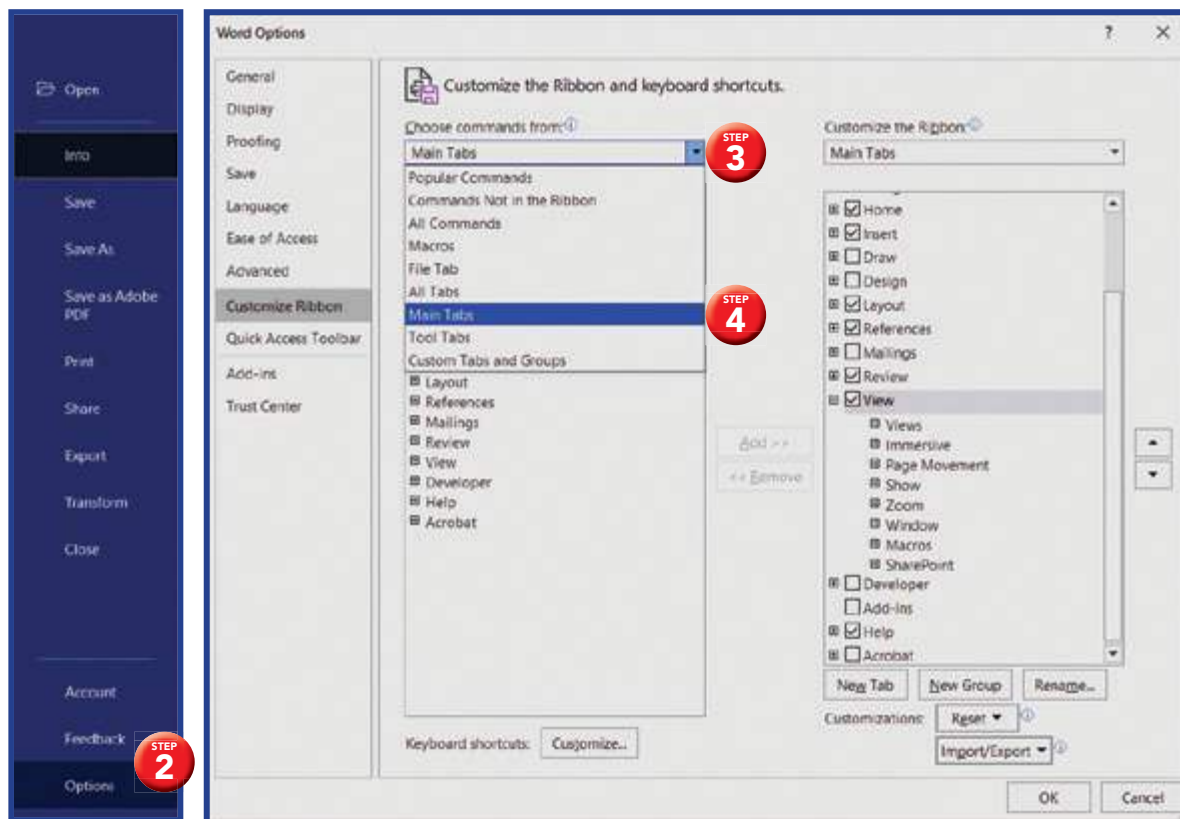


You can use the **Customise Ribbon** option to add other tabs to the Ribbon.

- Click on **File > Options > Customise Ribbon**.
- Select **Main Tabs** from the drop-down list under **Choose commands from**.
- Select the tabs you want to add to the Ribbon, then click on **Add** and **OK**.
- To remove a tab, select the unwanted tab in the column on the right side of the screen under **Customize the Ribbon**, click on **Remove** and then **OK**.

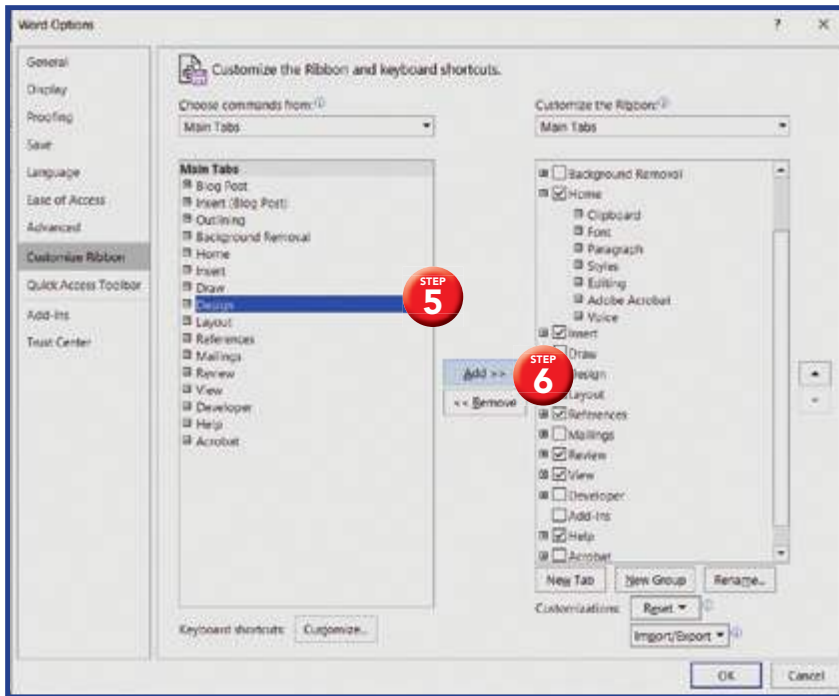


Tip You can customise the Ribbon in such a way that only the tabs you use regularly are displayed. For instance, if you never use the **Mailings** tab, remove it!

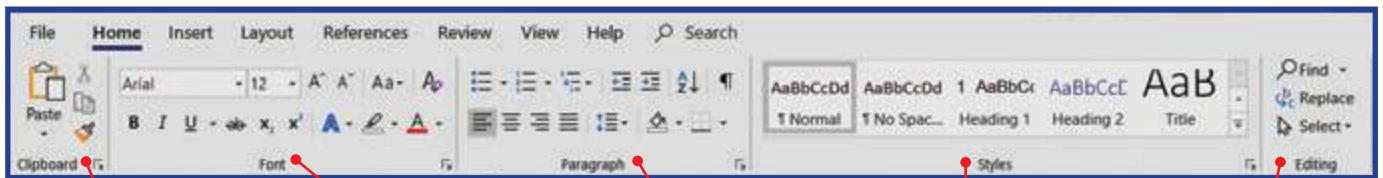


You can find out what a button is used for by hovering your mouse pointer over it. This displays a tooltip that briefly describes its function. For instance, if you hover over the **I** in the **Font** group on the **Home** tab, you will see this tooltip.

I Italic (Ctrl+I)
Italicize your text.



1.2.1 The Home tab



CLIPBOARD (8.4)

Copy, paste and cut
Format Painter (8.7)

FONT (2.1)

TYPE
size
bold,
italic
underline
lowercase
UPPERCASE,
Capitalize words
superscript¹
subscript₂
colour
highlight
CLEAR ALL

PARAGRAPH (2.6)

Indent
Line spacing
Paragraph spacing
Numbering lists
Levels of numbering

STYLES (4.1)

Group formats together under a style

EDITING (3)

Find
Replace
Go To

1.2.2 The Insert tab

The screenshot shows the Microsoft Word ribbon with the 'Insert' tab selected. Red lines connect specific icons on the ribbon to callout boxes below. The callout boxes contain the following information:

- PAGES**
 - Cover page
 - Blank page
 - Page break (2.11)
- TABLES (9.11)**
 - Table icon
- LINKS**
 - Bookmarks (9.8)
 - Cross-references (4.4)
- COMMENTS (6.3)**
 - Comment icon
- HEADERS (2.9) & FOOTERS (2.10)**
 - Page numbers (2.12)
- TEXT**
 - Quick parts (8.3)
 - Signature line (9.6)
 - Date and time (9.4)
- SYMBOLS (9.1)**
 - (ëüê¥©€)

1.2.3 The Layout tab

The screenshot shows the Microsoft Word ribbon with the 'Layout' tab selected. Red lines connect specific icons on the ribbon to callout boxes below. The callout boxes contain the following information:

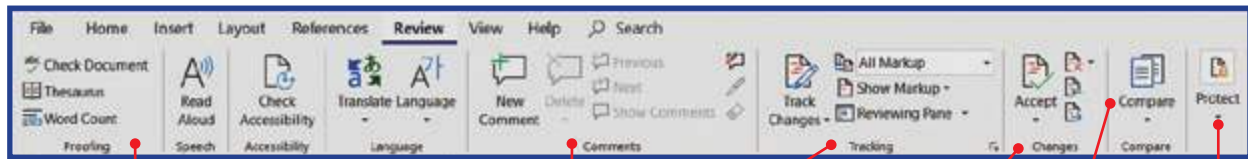
- PAGE SETUP**
 - Margins (2.3)
 - Columns (9.12)
 - Breaks (2.11)
 - Line numbers (6.1)
- PARAGRAPH (2.6)**
 - Indent (2.5)
 - Spacing between paragraphs (2.8)

1.2.4 The References tab

The screenshot shows the Microsoft Word ribbon with the 'References' tab selected. Red lines connect specific icons on the ribbon to callout boxes below. The callout boxes contain the following information:

- FOOTNOTES**
 - Endnotes (9.9) and footnotes (9.10)
- CITATIONS & BIBLIOGRAPHY**
- CAPTIONS**
 - Cross-references (4.4)

1.2.5 The Review tab



PROOFING
Spellcheck and grammar (3.5)
Thesaurus

COMMENTS
(6.3)

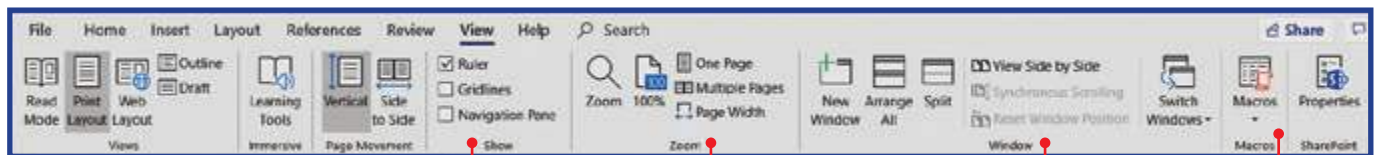
TRACKING
Track changes
(6.4)

CHANGES
Accept or reject
(6.4.8)

PROTECT
(7.4)
Restrict editing
(7.5)

COMPARE
Compare and combine (6.5)

1.2.6 The View tab



SHOW
Ruler
Navigation pane (5.4)

ZOOM
One page
Multiple pages

WINDOW
New window
Arrange
Split (5.2)
Switch windows
View side by side (5.1)

MACROS
(8.10)

1.2.7 The Design tab: Headers and footers



HEADER & FOOTER
Insert:
Headers (2.9)
Footers (2.10)
Page

INSERT
Date & time (9.4)
Document info (11.4)
Quick Parts (8.3)

OPTIONS
For headers, footers and
page numbers, select:
different first page (2.11)

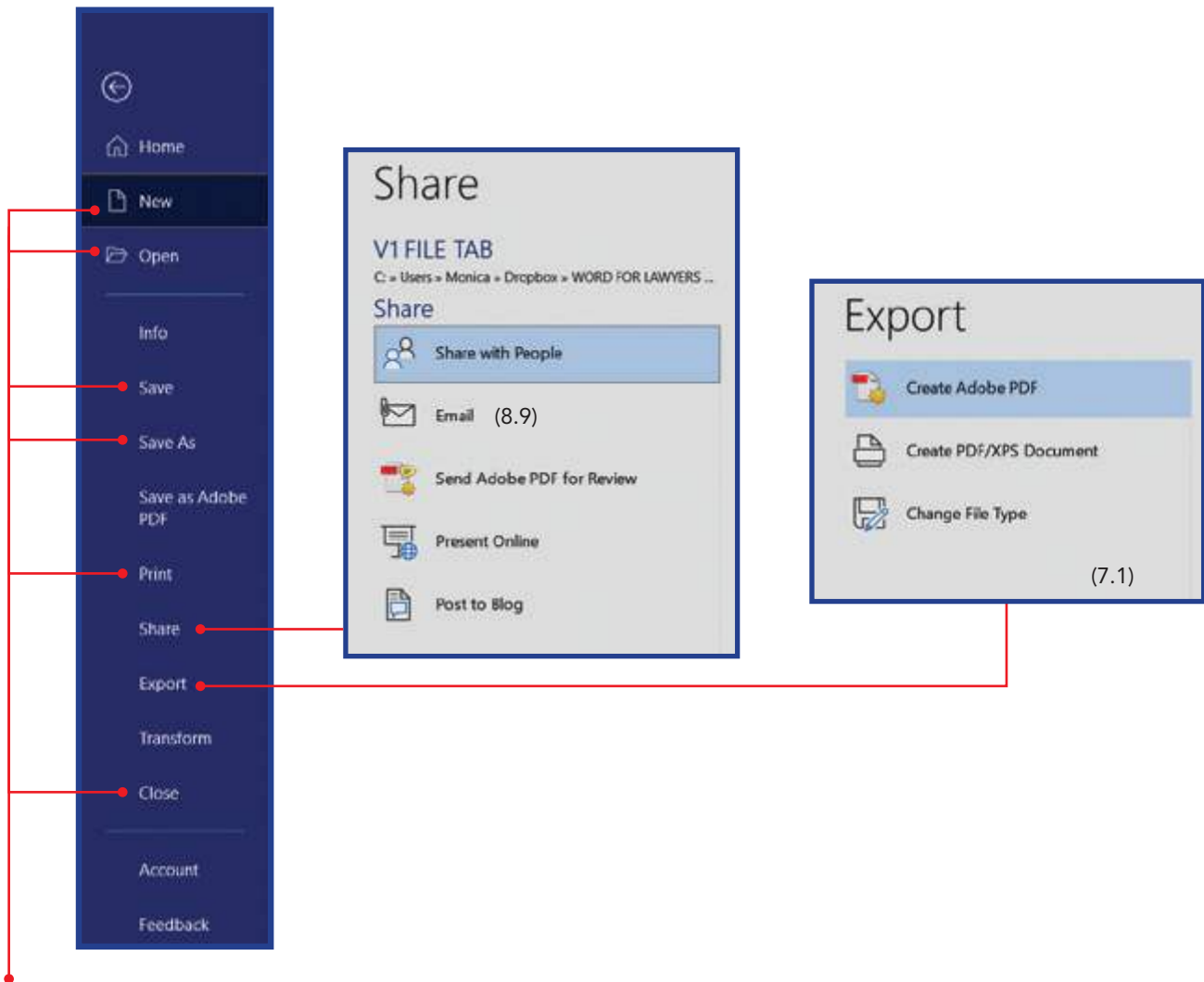
POSITION
Change position of
headers from top and
footer from bottom



This tab appears on the Ribbon only when you're working in the header or footer part of a page.

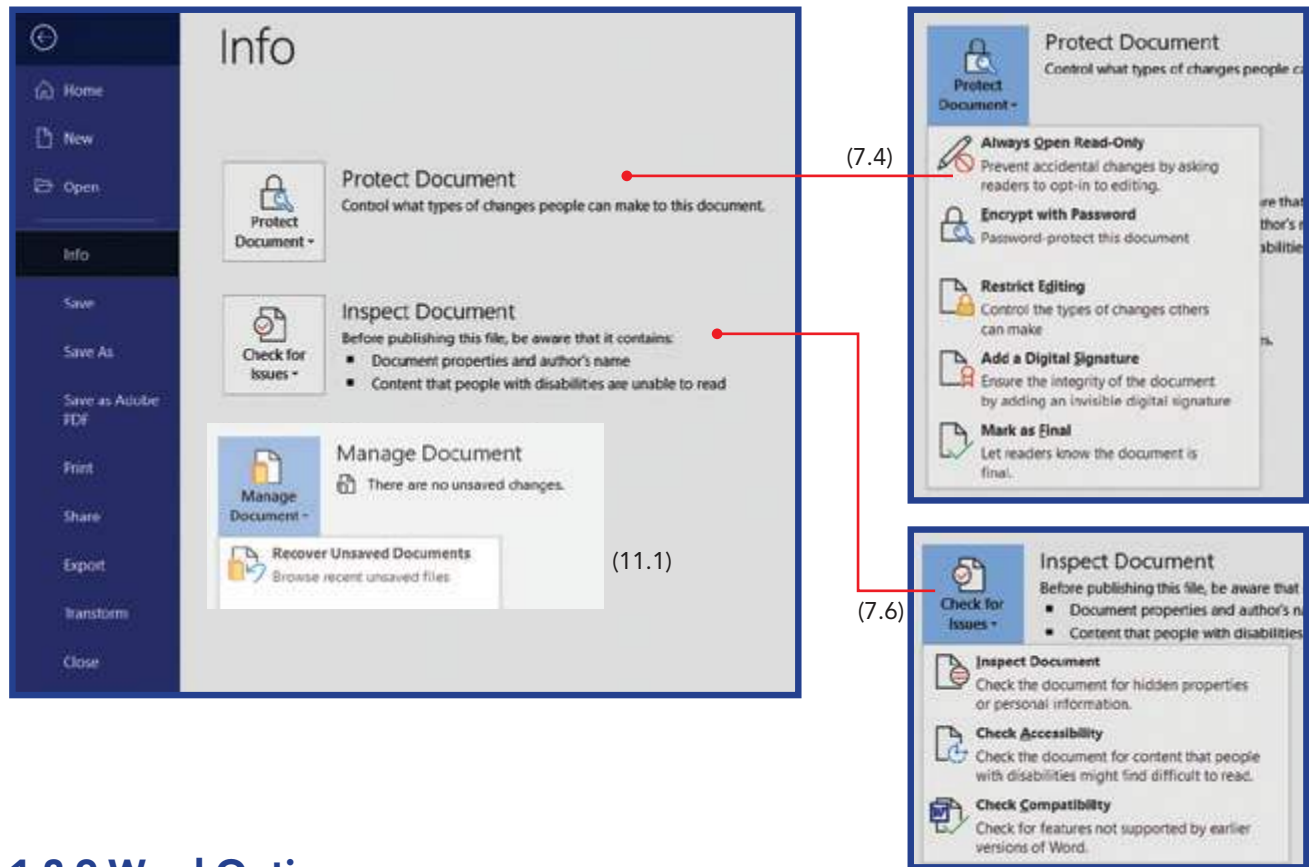
1.2.8 The File tab

The **File** tab is the path to important functions and general settings. You can change the way you want to work with Word by making changes in the settings.



Tip You can make access to the functions you frequently use easier by adding them to the Quick Access Toolbar (1.3). For instance, you might want to add **New**, **Open**, **Save**, **Save As**, **Print** and **Close**.

The **Info** tab gives you access to the following functions:



1.2.9 Word Options



Insight

Important backstage settings under *Word Options*

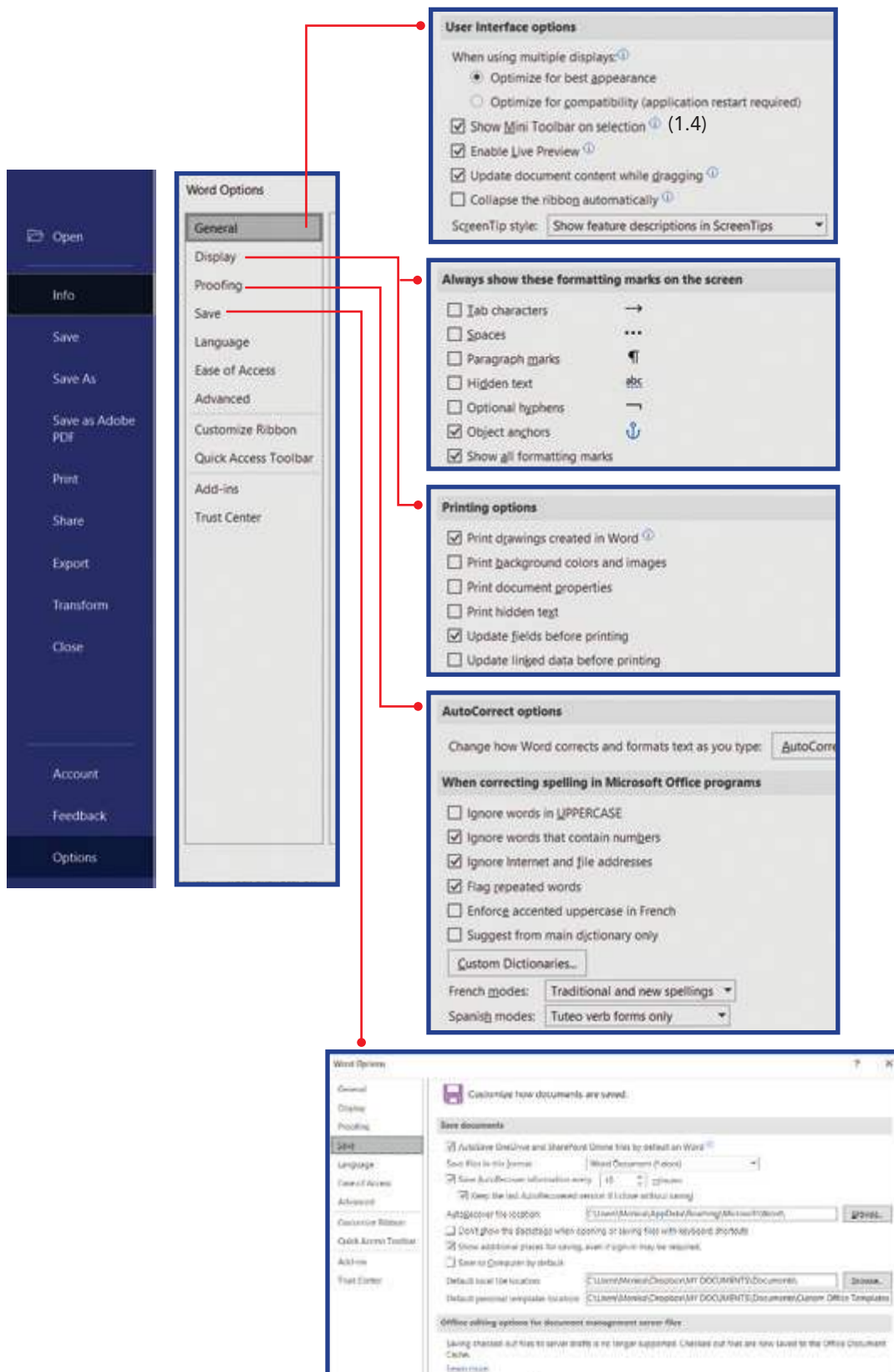
The backstage settings control how **Word** works. When you find yourself fighting with **Word** or **Word** is fighting with you, the problem often stems from a setting that needs to be changed. You can find and change these settings in the **Options** section under the **File** tab.

From the maze of settings available, there are several important settings that relate to the targeted functions in this manual. Check your backstage settings to ensure that these settings are correct.



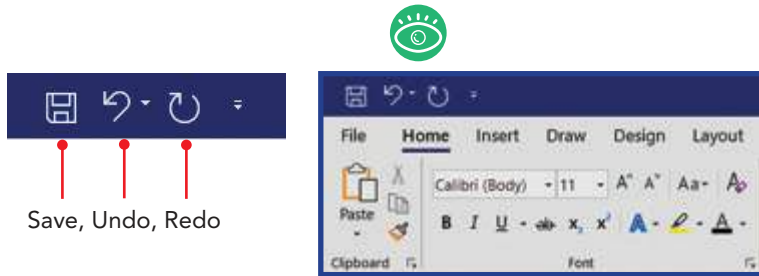
The settings in the backstage apply to ALL documents, not just the current document you are working on.

- To access the **Word** backstage options, click on **File > Options**.



1.3 The Quick Access Toolbar

Work faster and with much less effort by gaining quicker access to the functions you frequently use. You can retain the minimum functions – **Save**, **Undo** and **Redo** – or add as many functions as you like.

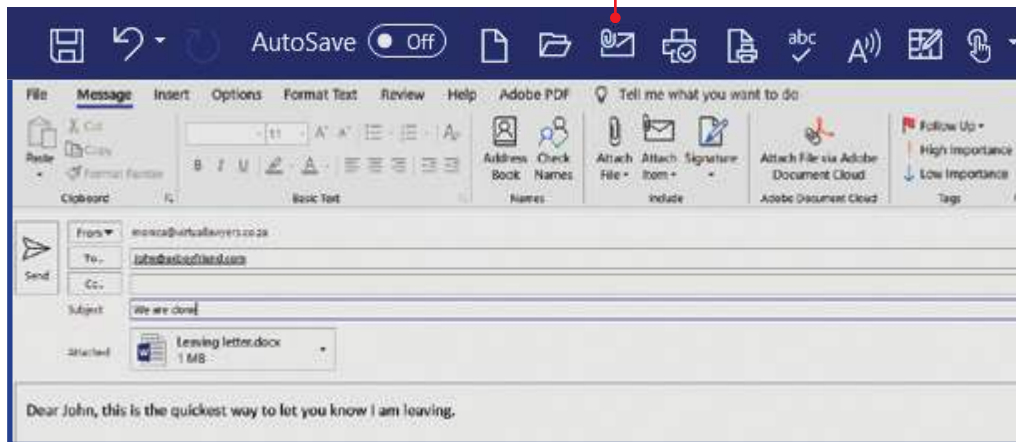


The Quick Access Toolbar is at the top left of the **Word** screen, either above or below the Ribbon.



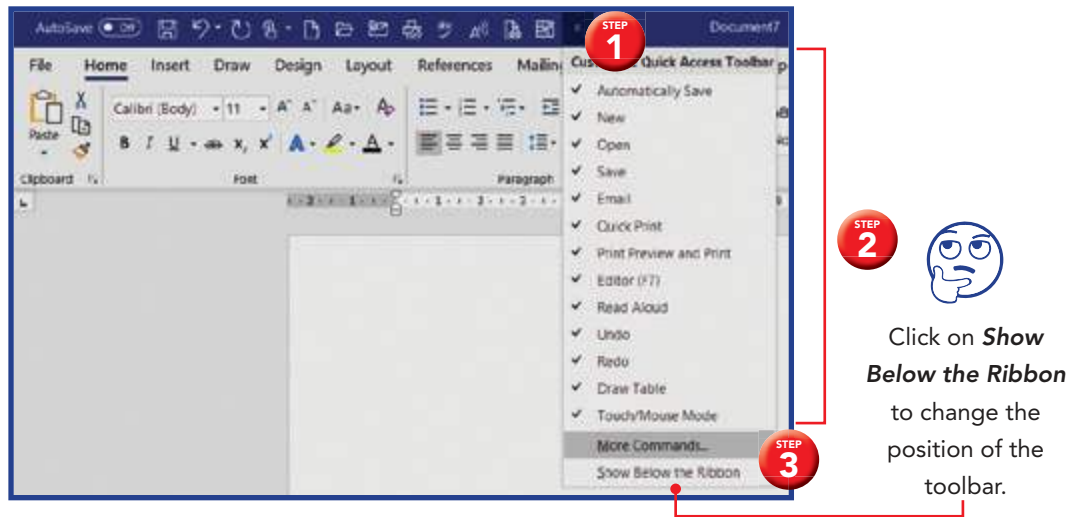
1.3.1 How to use the function in the Quick Access Toolbar

Simply click once on the function you want to execute. For instance, to e-mail the current document, click on . Microsoft® Outlook will open automatically.

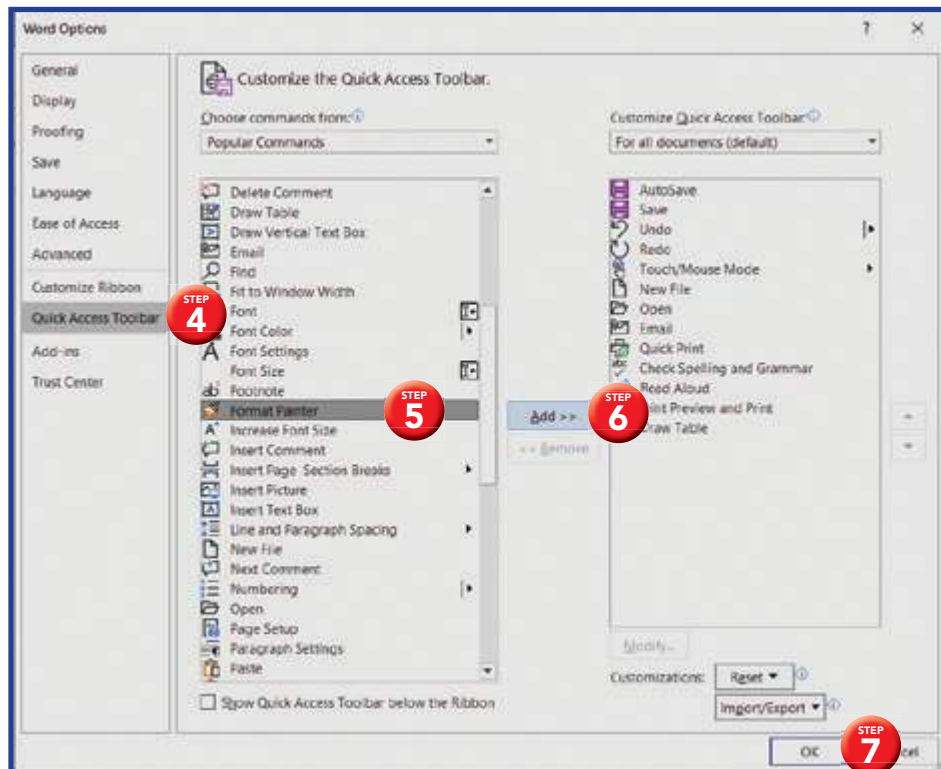


1.3.2 How to add functions to the Quick Access Toolbar

- Click on the down arrow ▼ to the right of the Quick Access Toolbar. A drop-down list of frequently used functions appears.
- Select the functions you want to add.
- If a function you're looking for isn't in the list, click on **More Commands**.



- A dialogue box containing all possible functions displays.
- Scroll down to the function you want to add, select it, click on **Add** and then click **OK**.



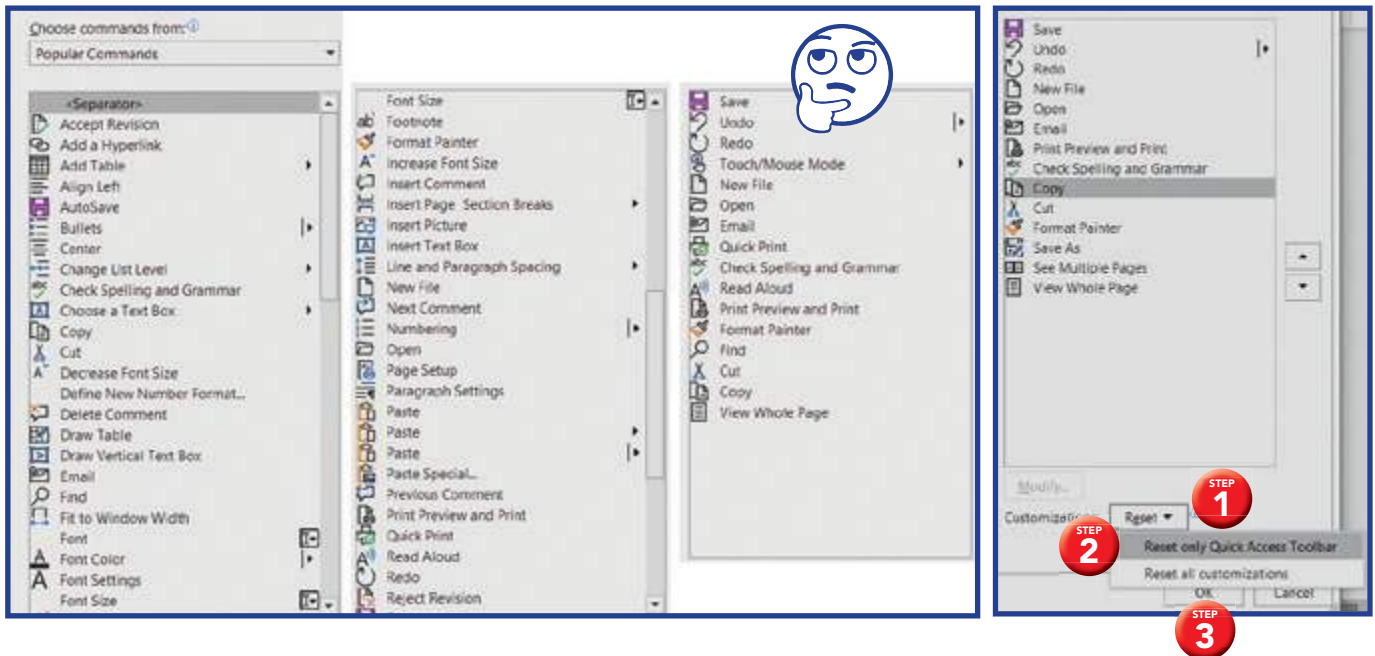
You'll notice that the function you selected appears to the right of the current buttons in the toolbar. This function will be available for all documents.




1.3.3 Suggested functions for the Quick Access Toolbar

There are more functions to choose from under **Choose commands from** such as *All Commands* and *Commands not in Ribbon*, however, shown below are the popular options.


The screenshot on the right shows suggestions specifically for legal documents.



 You can remove functions from the toolbar or reset it to its minimum functions.
Time saver

When you configure a Quick Access Toolbar tailor-made to your needs, you have a useful tool for quick and effortless drafting and editing.

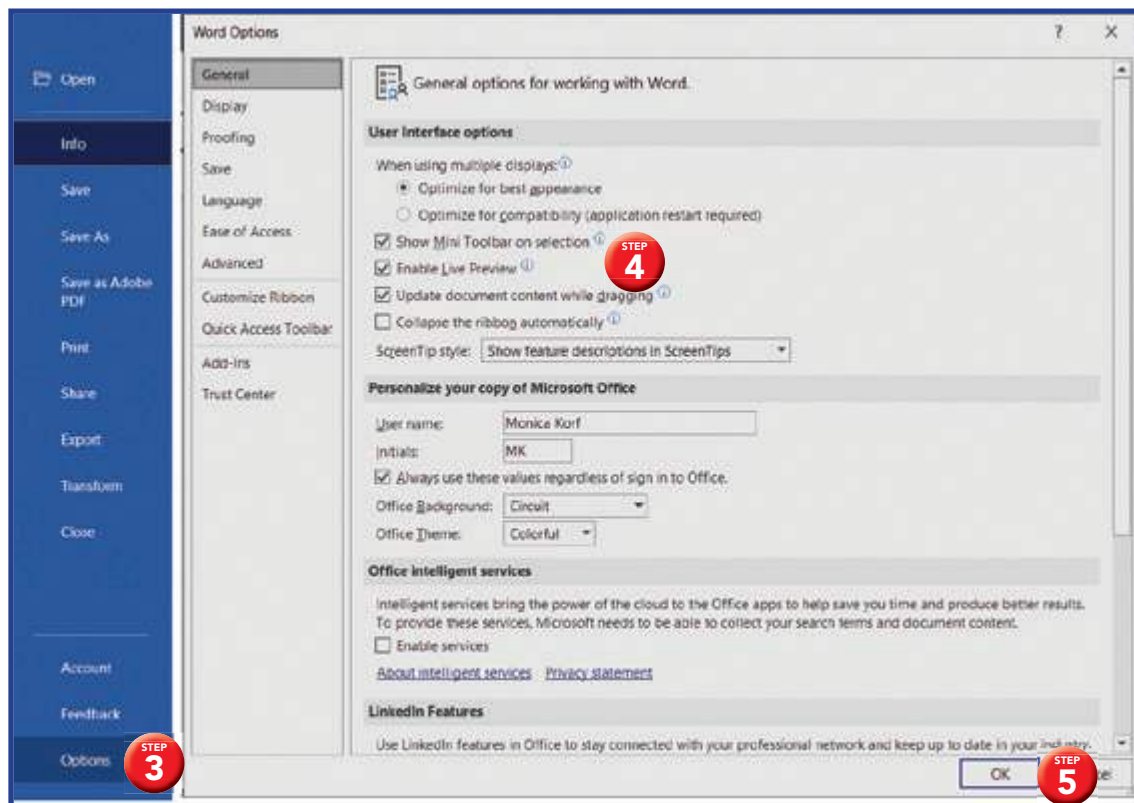
1.4 The Mini Toolbar

 You can **right-click** the mouse anywhere in the text or select a word to access the Mini Toolbar. This toolbar contains the most frequently used formatting functions.



Turn the Mini Toolbar on or off:

- Click on the **File** tab
- Click on **Options > General**.
- Under **User Interface options**, select or deselect the checkbox called **Show Mini Toolbar on selection**.



1.5 Tell me what you want to do

This is a new feature in **Word 2016** and the fastest way to find any function.



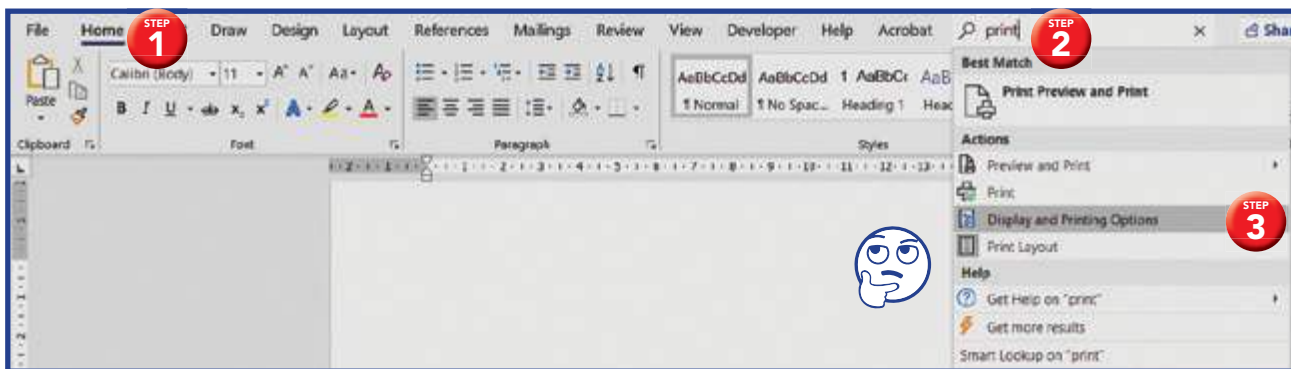
Where is the watermarks function hiding?

Frustration



Instead of searching frantically through the maze of tabs, groups, functions, and drop-down lists, the **Tell me what you want to do** search box can take you directly to the function you're looking for.

- Click on the **Home** tab.
- Click inside the **Tell me what you want to do** search box.
- Type in what you want to do, for instance "Print". This opens a drop-down list with related functions. When you select a function, **Word** will take you there immediately.



You can access the **Tell me what you want to do** search box very quickly using a **keyboard shortcut**: Press and hold the **Alt** key, then press **Q**.

Press  + 



Shortcuts are written as mini formulas, e.g. **Alt+Q**. Find out more about keyboard shortcuts in **1.6.4 Keyboard shortcuts**

1.6 Many paths to the same function

As you know, all functions can be accessed via the groups of functions in the tabs on the Ribbon. However, there are other quicker paths to the same functions, as listed here.

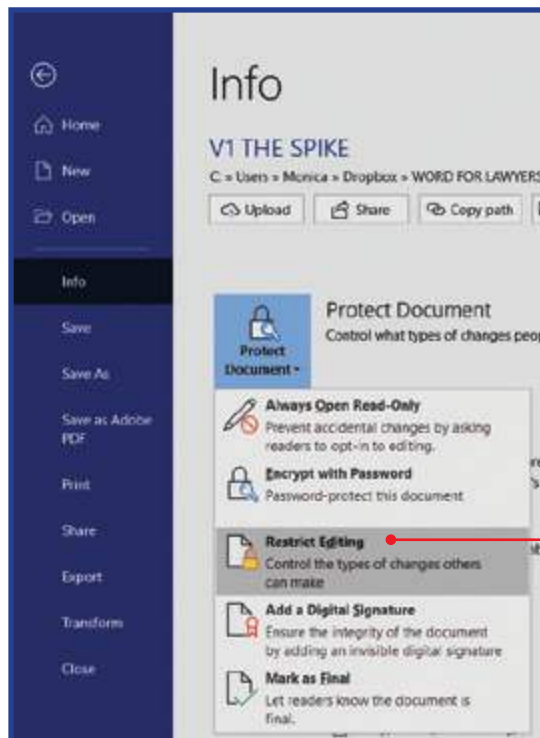
When you know which paths are available, you can choose the one that works best for you.

1.6.1 Quick Access Toolbar

Using and customising the Quick Access Toolbar is covered in 1.3.

1.6.2 File tab

You click on the **File** tab at the far left of the Ribbon to access a menu of functions that are frequently used, such as **Save**, **Save As**, **New** and **Print**.



! Important backstage settings can only be reached via **Options** in the **File** menu. **Options** is the last item under the **File** menu. Often you will have to scroll down to reach it.

You can also access the **Restrict Editing** options via the **Protect Editing** group in the **Review** tab.

1.6.3 Pop-up (context) menus

You can right-click the mouse anywhere in your text or on a graphic to access the Mini Toolbar as well as a pop-up menu containing functions that are related to what you're doing.



1.6.4 Keyboard shortcuts

As you saw at the end of section 1.5, you can combine keyboard keys that execute frequently used functions. This means that you can execute a function as you type without having to use the mouse to select the function. To use a keyboard shortcut, press the relevant keys down at the same time.

For example, to save your document, press the **Ctrl** button and the **S** button:



Here are the most common keyboard shortcuts:

Task	Shortcut	What it means
Work with files	Ctrl+S	Save the current document
	Ctrl+O	Open a document
	Ctrl+N	Open a new, blank document
Style text	Ctrl+B	Bold
	Ctrl+I	Italic
	Ctrl+U	Underline
Cut, move, paste	Ctrl+X	Remove selected text or image
	Ctrl+C	Copy selected text or image
	Ctrl+P	Paste selected text or image in new location
Find and replace	Ctrl+F	Open the Find navigation pane
	Ctrl+H	Open the Find and Replace dialogue box

1.6.5 Screenshot (Tooltips)

We covered how to access tooltips in *1.2 Tabs*. But what if you hover your mouse over a button and nothing appears? Here's how to fix that:

- Click on **File**, then **Options**.
- In the **General** screen select the **ScreenTip style** drop-down arrow.
- Then select **Show feature descriptions in ScreenTips**.
- Click on **OK**.

