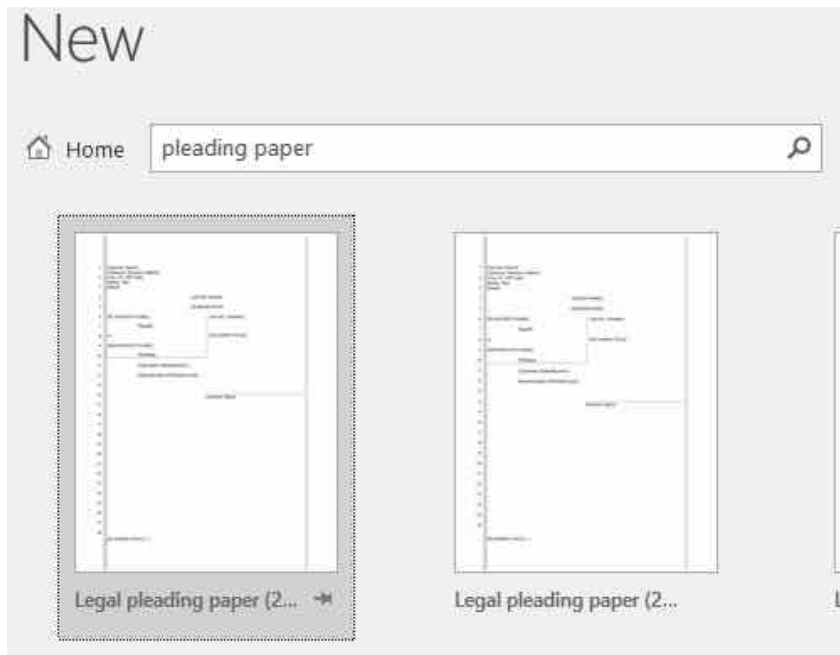


Advanced Microsoft Word for Lawyers – Quick Reference Guide

Commands based on the latest version: Word 2016; Some Procedures are applicable to earlier versions as well such as Word 2010 or 2013.

Create a Document using a Legal Template (Legal Pleading Paper)

1. Click **File, New**
2. Click in the **Search for Online Template** box and enter the search phrase “Pleading Paper”



3. Select Legal pleading paper (28 lines)
this is just an example of several templates you can choose
4. Click **Create**



5. Fill in the pleading paper with your specific text.

[Attorney Names]	
[Attorneys' Business Address]	
[City, ST ZIP Code]	
[phone fax]	
[email]	
	[COURT NAME]
	[JURISDICTION]
[PLAINTIFF'S NAME],	Case No.: [Number]
Plaintiff,	
vs.	[PLEADING TITLE]
[DEFENDANT'S NAME],	
Defendant	
[Type body of pleading here.]	
Dated this [day] of [Month], [year].	
	<hr/> [Attorney Name]

6. Save the file as a normal document as needed.
7. In the future, to use the template again, just click File, New, and select the pleading paper template.
It should be listed among your other stored templates so you can access it without an online search.

Formatting Documents: Alignments, Indents

- **To Align text**
 - Select text or click inside line of text
 - From the Home tab on the Ribbon, click Align Left, Center, Align Right or Justify icons
- **To Align an Object (line)**
 - Click to select object
 - Click Format tab on the Ribbon, then click Align
 - Choose an alignment type (Align Left, Center, Right)

For changing Line thickness and other settings, choose Format, click the drop down arrow next to the Shape Outline icon

- **To Align a Picture**
 - Select the picture
 - Click the Format tab
 - Click the Align icon then choose alignment selection (choose Left, Center, Right)

Note: this works when the Wrap Text setting is not set at "In Line with Text"

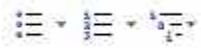
- **To Set Indents**
 - Select the line or paragraphs to change indentation.
 - From the Home tab, click the small arrow at the lower right of the Paragraph icon group
 - This presents the Paragraph box*
 - Choose Indentation parameters, click OK

Option: On the Ruler, drag the Indent Markers

The Paragraph box will also change line spacing ...to change spacing for the entire document, select all by pressing Control A, then change line spacing (and other format commands with Home tab icons such as the font style and size)

Formatting Documents: Bullets, Automatic Numbering, Outlines

1. Click the Bullet, Numbering, or Multilevel list buttons under the **Home tab** of the Ribbon (in the Paragraph group of icons)



Click the down arrow besides each icon for a library of different bullets, numbering, and list options.

2. Type text and press enter to get to the next bullet, number or outline level.
3. Press Tab or Shift Tab keys to change the level of the bullet or number.
4. Press Enter again to turn off this feature.



Page Setup: Custom Margins, Legal Paper

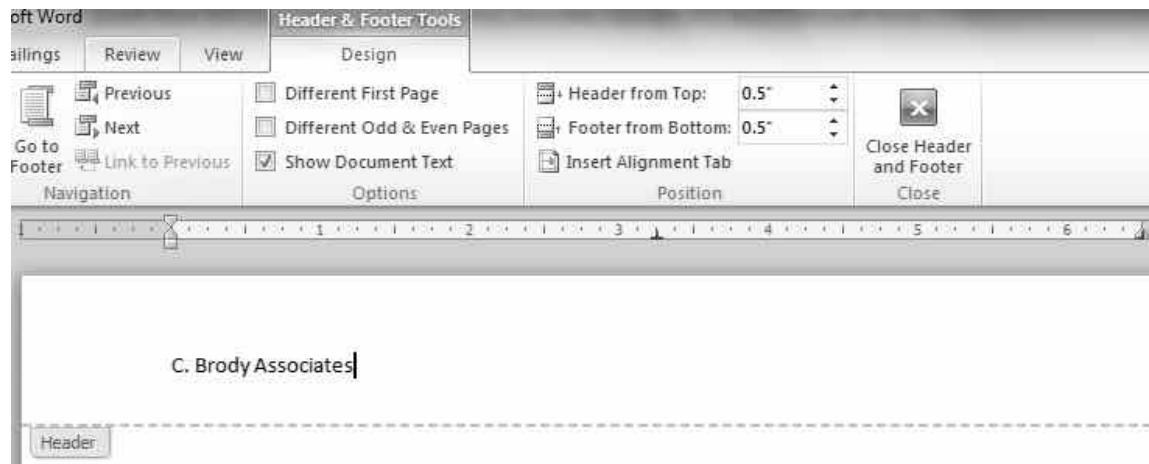
1. Click the **Page Layout** tab.
2. Select **Margins**
you can select predefined margins
3. Select **Custom Margins**
4. Specify Margin parameters, click OK
Option: Drag Margins on Ruler (left/right/top/bottom)
Under the Layout tab, you can also find icons to change to legal size paper or landscape orientation; just click the Size or Orientation icons then make the necessary selections.

Create and Edit Headers and Footers; Page Numbering

1. Click the **Insert** Tab.
2. Click Header, Footer or Page Number icon



3. Make the necessary selections as needed from the Header and Footer Tool's Design tab,

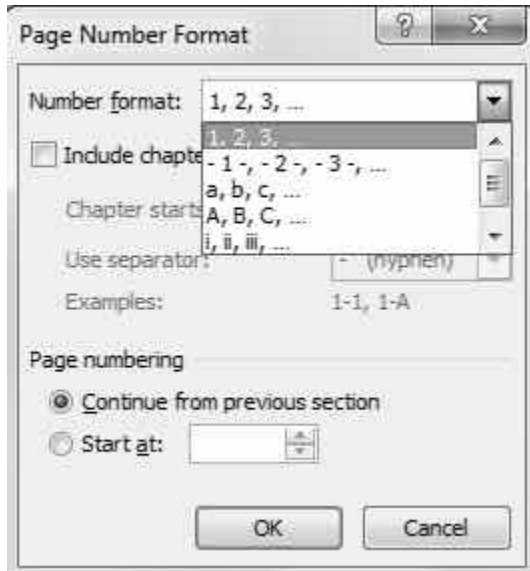


4. Type text as needed in the header, footer then to return to the normal typing area, click the **Close Header and Footer icon**

Shortcut: Double click at the top or bottom of the page in the Print Layout view to open up the Header or Footer section. Click the body of the document to close the Header/Footer

To Format an existing Page Number Code

1. Open the Header/Footer Section.
Double click at the top or bottom of the page to open up the Header or Footer
2. Highlight the Page Number that currently is displayed.
3. Click the Design tab
4. Click the Page Number icon
5. Click **Format Page Numbers**
6. Make any necessary changes, click OK.



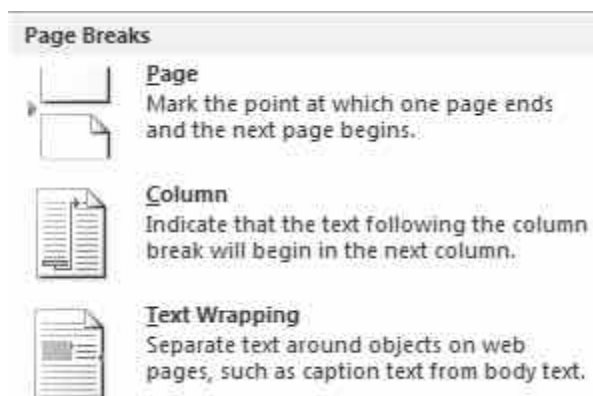
To Insert a Page Break

Note: Shortcut: To insert a page break, press Control + Enter keys

1. Move the pointer to where you would like to insert a Page Break.
2. Click the **Page Layout** Tab
3. Click the **Breaks** icon.



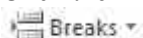
4. Select Page from the Page Breaks section



To Insert a Section Break

A section break can be useful when you want different information , such as a different Header/Footer text in each of several sections of a document or when you want to have one section of a page contain text in one column while the other section would contain two or more columns of text.

1. Move the pointer to where you would like to insert a Section Break.
2. Click the **Page Layout** Tab
3. Click the **Breaks** icon.



4. Select a Break icon from the Section Breaks section

Section Breaks



Next Page

Insert a section break and start the new section on the next page.



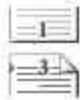
Continuous

Insert a section break and start the new section on the same page.



Even Page

Insert a section break and start the new section on the next even-numbered page.



Odd Page

Insert a section break and start the new section on the next odd-numbered page.

Note: A continuous section break is useful for setting up, on the same page, a section for typing text in one column (normal text) while the other section contains multiple column text (text typed in two or more columns)

Change the header or footer in one section

By default Microsoft Word automatically used the header and footer text from a previous section. So to use different header/footer text in a new section, such as starting new numbering of pages in roman numerals for a certain section of the document, first break the default link to the previous section via the following steps:

1. *Double click to get into the Header or Footer area of the document...notice the Section Number and Same as Previous indicators*
2. On the Design tab up top, click **Link to Previous** to turn “Same as Previous” off and allowing you to change things like page numbers with being independent of what is in the previous section.
3. Then insert the different text or page numbers for the new section

Use Find, Replace and Go to



- Click the **Home Tab**
- Click the **Find or Replace icon** or click the down arrow next to Find and click Go To
- Make the desired selections as needed

Notes: Find shortcut is Control F. Go to is Control G. Replace is Control H.

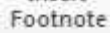
****When the Find icon is selected a navigation pane opens on the left hand side for finding text and objects To search for more things such as Advanced Find, Replace, GoTo, click the small down triangle to the right of the search text box. Below the search text box, you can click Heading or Pages to navigate to those areas within your document.*



To Insert a Footnote

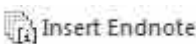
1. Move the pointer to the place in the text where a footnote number should be placed.
2. Click the **References** tab.



3. Click the Insert Footnote icon, , and notice that a number appears at the bottom of the page. Type the footnote text as needed.
4. Resume editing the normal document text as needed.

Note: Footnotes are automatically renumbered as you add/edit/remove/move footnote related text.

To Insert an Endnote

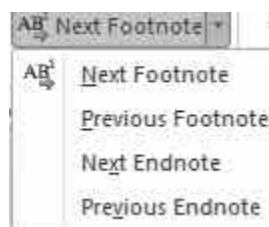
1. Move the pointer to the place in the text where an endnote symbol should be placed.
2. Click the **References** tab.
3. Click the **Insert Endnote** icon, , and notice that a small endnote numbered symbol appears at the end of the document. Type the endnote text as needed.
4. Resume editing the normal document text as needed.

Note: Endnotes are automatically renumbered as you add/edit/remove/move endnote related text.

Note2: To navigate to various footnotes, endnotes throughout the document, use the Advanced Find and Replace box (press Option Command G or click Edit, Find, Advanced Find and Replace)

Note: Endnotes are automatically renumbered as you add/edit/remove/move endnote related text.

Note2: To navigate to various footnotes, endnotes throughout the document, use the icons Next or Previous Footnotes/Endnotes



Formatting Documents with Styles: (& Mark Headings for Table of Contents)



1. Select the text in your document to apply a style.
For example, highlight text of headings for a consistent appearance (and to mark those headings for the Table of Contents).
2. Click the Home Tab
3. Select a style such as a heading for reports
Or click the down arrow to the right to select additional styles

To Modify a Style right click the style, choose Modify, make changes, then click OK

Option: click the small arrow at the bottom right of the styles section to bring up the Styles Window.

Automatic Table of Contents

1. First apply heading styles (Heading 1, Heading 2, etc) throughout the document.
2. Move the pointer to where the Table of Contents should be inserted.
3. Click the **References** tab.
4. Click the Table of Contents icon, then choose one of the Built-in Table of Contents or choose Insert Table of Contents to customize your selection. Click OK.

Built-In

Automatic Table 1

Contents

HEADING 1	1
HEADING 2	1
Heading 3	1

Automatic Table 2

Table of Contents

HEADING 1	1
HEADING 2	1
Heading 3	1

Manual Table

Table of Contents

TYPE CHAPTER TITLE (LEVEL 1)	1
TYPE CHAPTER TITLE (LEVEL 2)	2
Type chapter title (level 3)	3
TYPE CHAPTER TITLE (LEVEL 1)	4
TYPE CHAPTER TITLE (LEVEL 2)	5
Type chapter title (level 3)	6

Insert Table of Contents...

Note: To add or change an entry to the table of contents after it has been inserted, first make the change a heading in the document, then go back to the Table of Contents, right click it, and choose Update Field, then make a selection to update either the page numbers only or the entire Table of Contents, then click OK.

Update Table of Contents

Word is updating the table of contents. Select one of the following options:

☒ Update page numbers only

☐ Update entire table

OK Cancel

Table of Authorities

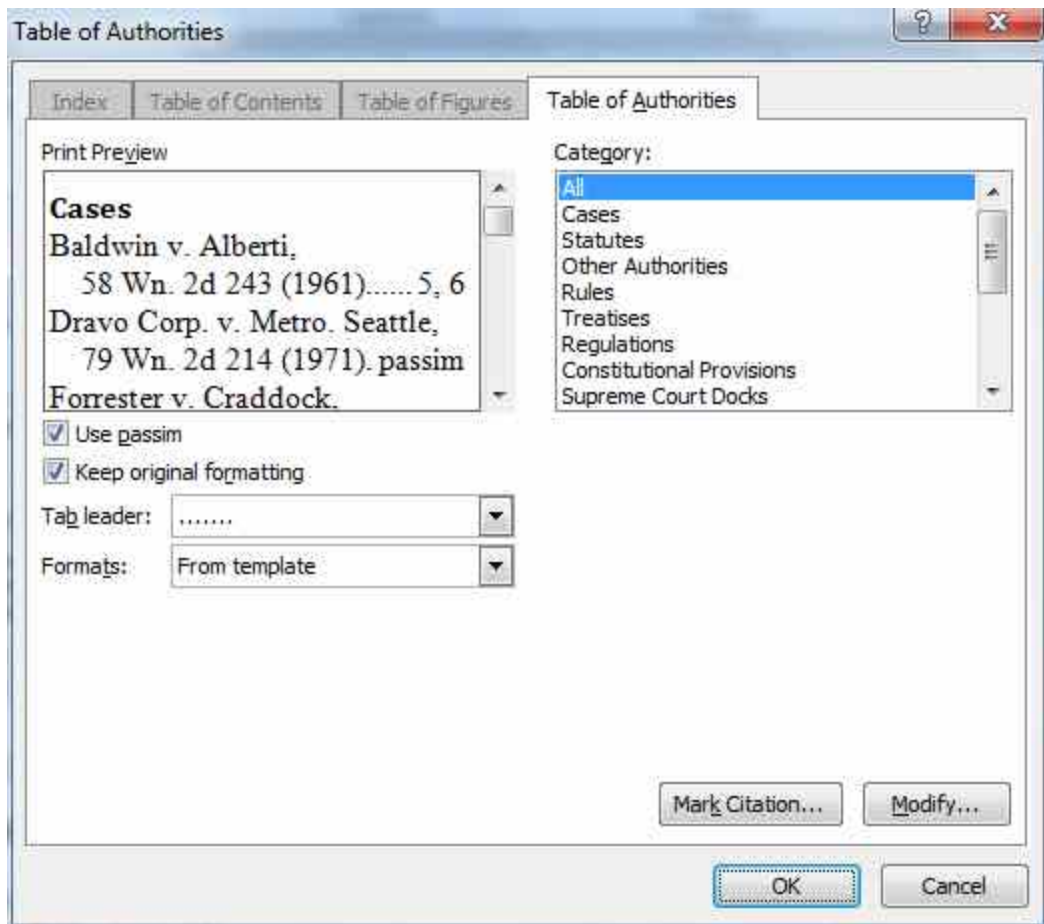
Step 1: Mark Citation Entries throughout the document

1. Click the **References** Tab.
2. Click the **Mark Citation** icon
3. Click **Next Citation** to let Word find the next Citation
4. Select the text you want to appear in the table of authorities
5. Click in the Selected txt box and that text you highlighted will appear there.
6. Make any changes in the Selected Text box
the text that appears in the table of Authorities is listed in the long citation
7. **If needed, Select a Category**
Such as Cases, Statutes, Rules
You can create your own categories to assign citations by clicking the Category button
8. **Click the Mark** icon.
9. The Mark Citation box remains open allowing you to move to other text areas by clicking the **Next Citation** icon, select the text to go into the table., click back in the Selected text box, make necessary changes then click the **Mark** icon again ...continue this process until you have marked all necessary entries.
The Next Citation icon looks for possible citations by stopping at “v.”, “In re”, “Id”, § etc...
10. When done, click Close.

Note: When you close the Mark Citation box, The Show/Hide command automatically activates to show you the hidden TA codes (as well as paragraph symbols, etc.). You can change the TA entry further by changing the text within the quotation marks. Changing the text in the first part changes what is in the table of authorities when you update it; changing the “c” code e.g. c1 to c2 will change the category when you update the table. Select the Show/Hide icon on the Home tab to hide those symbols when done, ¶ .

Step 2: Insert a Table of Authorities

1. Move to the place in the brief where you want to insert a Table of Authorities
2. Click the **References** Tab
3. Click the Insert Table of Authorities icon.
4. Make any necessary changes before insertion.
*For example, you can click the **Modify** button to change the font in the TOA styles.*
5. Click OK.



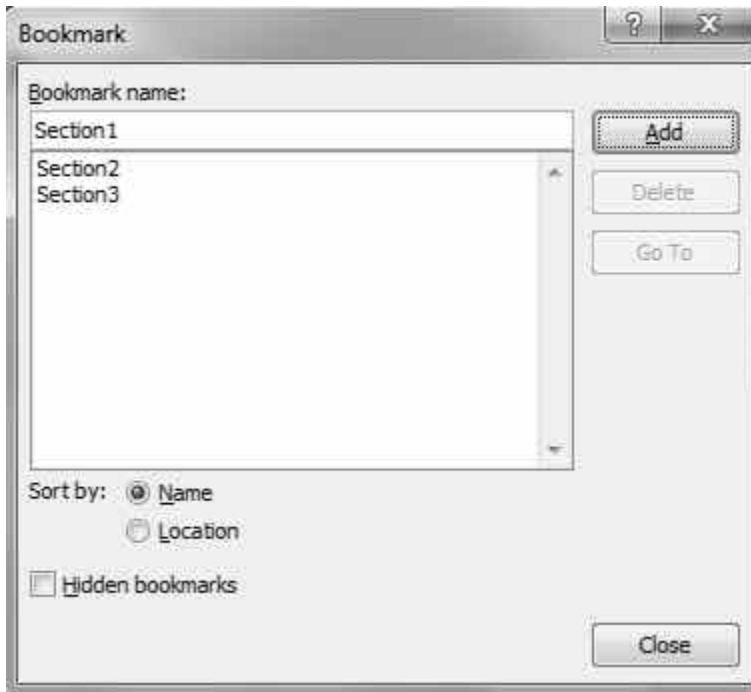
Optional Step 3: Updating the Table of Authorities

1. Mark additional citations or edit the existing TA codes to change the content of an existing TA entry.
2. Move back to the existing Table of Authorities entry.
3. Right click in the Table of Authorities
The table area should turn grey indicating the TA field
4. Click **Update Field**

Links: Bookmark, Hyperlink, Cross-reference

To Insert a Bookmark:

1. Place the pointer in the document where you want to insert a bookmark.
2. Click the Insert Tab.
3. Click Bookmark
4. Type the Bookmark name, then click Add.



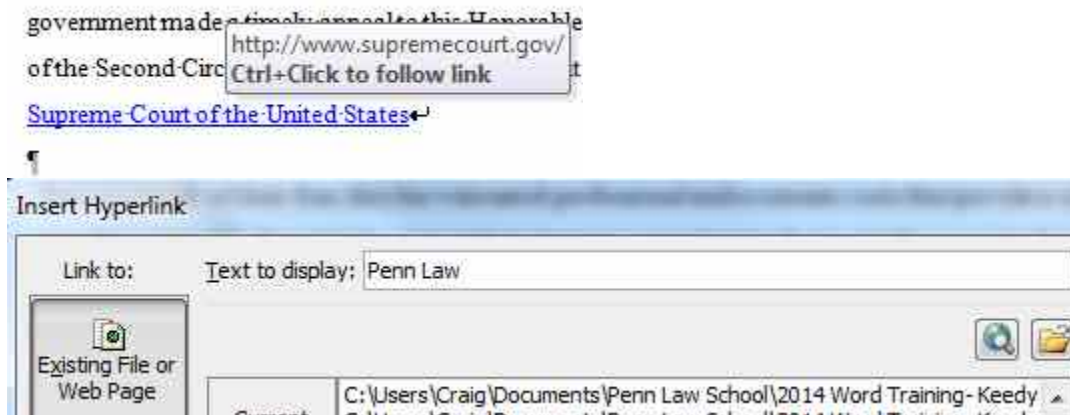
5. To go to the bookmark later, press **Control G**, then select **Bookmark**, select the drop down arrow, select the bookmark to go to, then click the Go To button



To Insert a Hyperlink

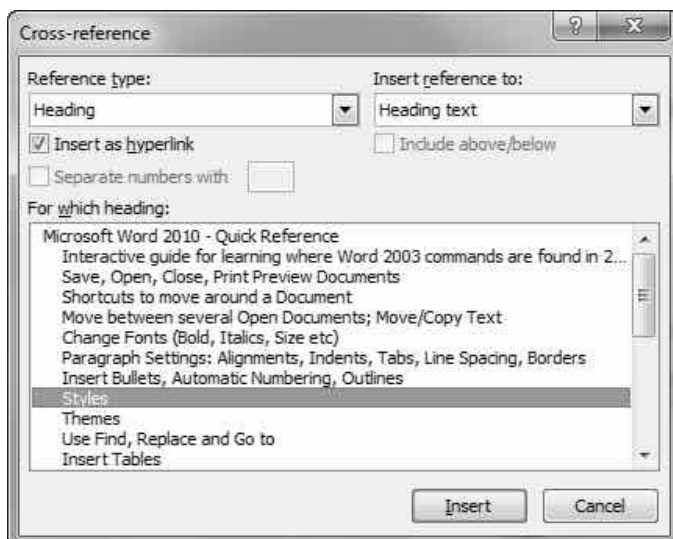
1. Place the pointer in the document where you want to insert a hyperlink.
2. Click the Insert Tab.
3. Click Hyperlink
4. Select the type of link needed
(**File/Web Page, Place in this document**, create new document, email address)
5. Fill in the text to display and the Address or choose a heading/bookmark to link to
6. Click OK.

Note: If you insert a hyperlink to a web site or to another area in the document, then to go there, place the mouse pointer over it, hold down the Control Key and click.



To Insert a Cross-reference

1. Place the pointer in the document where you want to insert a cross reference link.
2. Click the Insert Tab. Click Cross-reference
3. Select Options such as “Reference type”, and “ Insert reference to”. Click **Insert**
4. At this point the cross reference is inserted in your document. To move to its cross-reference, point and hold down the control key, then click.



To Turn on and use Track Changes:

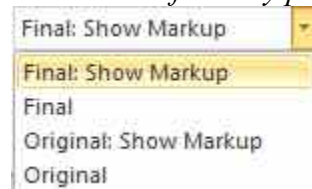
1. Click the **Review Tab**.
2. Click the **Track Changes** icon.
Insert text, delete text, mark font/formatting changes
Word automatically shows these changes in a different color or marks details of the changes on the side.
3. If you send the document to the author, that person can move to the Review tab, and click Accept or Reject on each change, clicking the **Previous** or **Next** icon to move backwards and forwards to each tracked change.

Options:

Click the drop down arrow next to Accept or Reject to choose other options such as Accept or Reject all tracked changes in the document

Click the New Comment icon to insert a comment on the document or specific part of the document. Type the note in a side view that opens to the right. When the document is reviewed, the reviewer can delete and move to comments with the Delete, Previous, and Next Icons in the Comments group of icons.

Click the Display for Review options to choose how to view the proposed changes such as see the Final copy showing the markups, Final which shows all changes included, Original which shows the document before any proposed changes, or Original with Markup.



Click the Reviewing Pane icon to show a SideBar of a summary of revisions

To Compare documents:

1. Click the Review Tab.
2. Click the **Compare** icon.
3. Choose **Compare** to compare two versions of a document (legal blackline) or **Combine** to combine revision from several authors into one combined document.
4. Choose the original document, the revised document, then make any necessary option changes and click OK. You can then compare the document; accept/reject changes etc...

To Combine documents

To combine revisions from several authors into one combined document

1. Click the **Review Tab**
2. Click **Compare** icon, then click **Combine**.
3. Choose the original document filename, the revised document filename, then make any necessary option changes and click OK.
 - a. *You may need to resolve conflicts with formatting if presented with a prompt about the two documents being merged having one or more conflicting formatting changes. Choose where to keep formatting changes from and click Continue with Merge (or Cancel)*

4. A new merged document will appear....on the side you may see a list of changes that you can accept/reject with the standard track changes icons.
5. Save the merged document if needed.

To Protect documents:

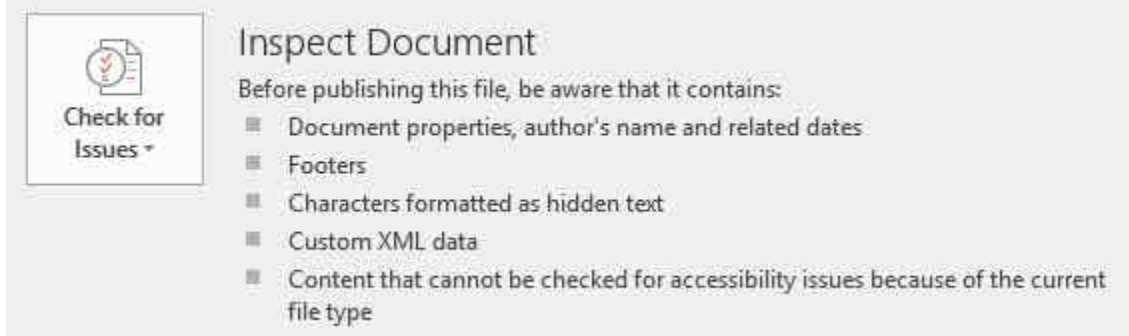
1. Click the Review Tab.
2. Click the **Restrict Editing** icon.
At this point a sidebar of restrictions appears to the right.
3. Choose Formatting, Editing Restrictions as needed.
4. Click Yes, Start Enforcing Protection
5. Enter a password (optional) then click OK.
At this point, your document is protected based upon the restrictions you specified. To stop Protection, just click the Review tab, Restrict Editing, then click the Stop Protection button. Close the sidebar as needed.

Prepare Document for Sharing 3rd Parties:

Remove Properties (Remove Metadata)

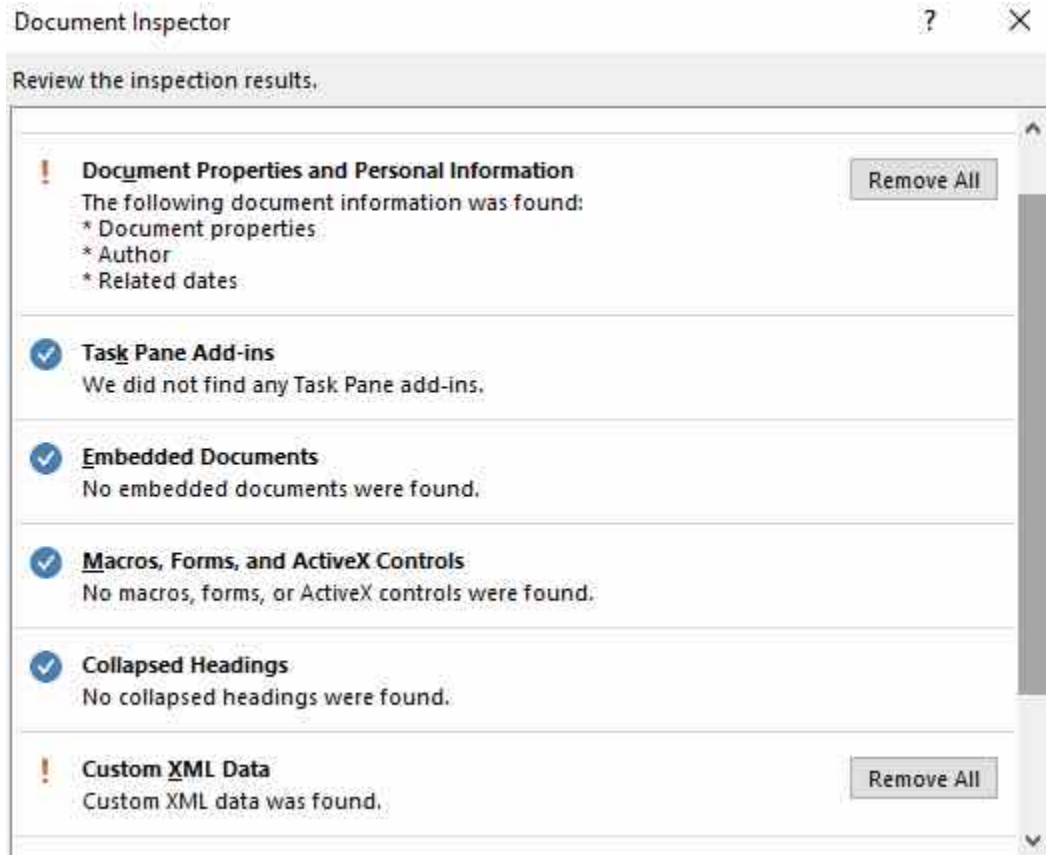
Prior to sending to a third party, you may want to remove information embedded in the document such as the author's name and related dates

1. Click **File, Info**
2. Click **Check for Issues** (next to Inspect Document)...then click **Inspect Document**



3. Click **Inspect**
Optional: deselect check Headers, Footers, and Watermarks

4. Click **Remove All** buttons besides **Document Properties and Personal Information** and if needed click **Remove All** besides **Custom XML Data**



5. Click Close...Save document as needed.

Save as PDF/ Use Links to jump around in a PDF document

1. Insert hyperlinks/cross references links as needed in the document.
2. Click File, Save As
3. Change the Save as Type **PDF**
4. Click the Save button.
5. Open the PDF document.
6. Move to the link, point and click.

Convert a PDF to Word

1. Insert hyperlinks/cross references links as needed in the document.
2. Click File, Save As
3. Change the Save as Type **PDF**
4. Click the Save button.
5. Open the PDF document.
6. Move to the link, point and click.

Shortcuts for Navigating a Document

Navigation	Press this Shortcut Key(s)
End of Document	Control + End
Beginning of Document	Control + Home
Top of Next or Previous Page	Control + Page Down; Control + Page Up
Top of Specific Page	Control G, then enter page number to go to
End or Beginning of a line of text	End/Home keys
Switches between document windows	Control F6 or Alt Tab keys (switches to other apps)

Word Keyboard Shortcut Keys

Shortcut Key	Function
Control A	Highlights the entire document
Control B	Bold
Control C	Copy
Control D	Font
Control E	Center
Control F	Find
Control G	GoTo page number
Control H	Replace
Control I	Italics
Control J	Justify
Control L	Left Justify
Control M	Increase Left Indent
Control N	New Document
Control P	File, Print
Control Q	Removes all Paragraph Formatting
Control R	Right Justify
Control S	File, Save
Control T	Hanging Indent
Control U	Underline
Control V	Paste
Control X	Edit, Cut
Control Y	Repeat Typing
Control Z	Edit, Undo

Other Shortcut Keys:

Control Spacebar	Removes all Character Fonts in the Normal Style
Control Enter	Inserts a Page Break
Shift F3	Changes Case (Lower to Upper, etc.)
Control 1	Single Space
Control 2	Double Space
Control 5	1.5 inch spacing

*Notes: Pressing the ALT key shows letters & numbers for more shortcuts.
Press F1 Help Key and type Word Keyboard Shortcuts for more listings.*

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