



WORD FOR MAC

FOR LEGAL PROFESSIONALS

Covering Word for Mac
2019, and Microsoft 365

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>





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 Ribbon79
 What Happens when Paragraph Marks Are Deleted79
 Paragraph Alignment79
 Line Spacing80
 Automatic Spacing Between Paragraphs80
 Keeping Text and/or Paragraphs Together..... 81
 Automatically Start a Paragraph at the Top of a New Page83
 TIP - What To Do If You Experience Bizarre Page Breaks.....83
 Tabs83
 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 Points95
 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 Breaks105
 Page Setup.....106
 Legal Tip - Printing Specific Sections and Pages110

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 Templates187

Using Templates.....188

Modify a Template.....188

Sharing Templates188

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 Uses192

Advanced Techniques.....194

Fill a Form.....199

Using Fill-In Fields.....199

CHAPTER 31 MAIL MERGE

When Mail Merge Is Useful201

Steps In a Mail Merge201

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 Replicate204

Step Five - Remove Unnecessary Keystrokes.....205

Step Six - Wipe Out All Font and Paragraph Formatting208

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 Tables213

Step Eleven - Build and Apply Styles To Handle Formatting213

Step Twelve - Deal with Footnotes213

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 Line228

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 Document234

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 18

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:

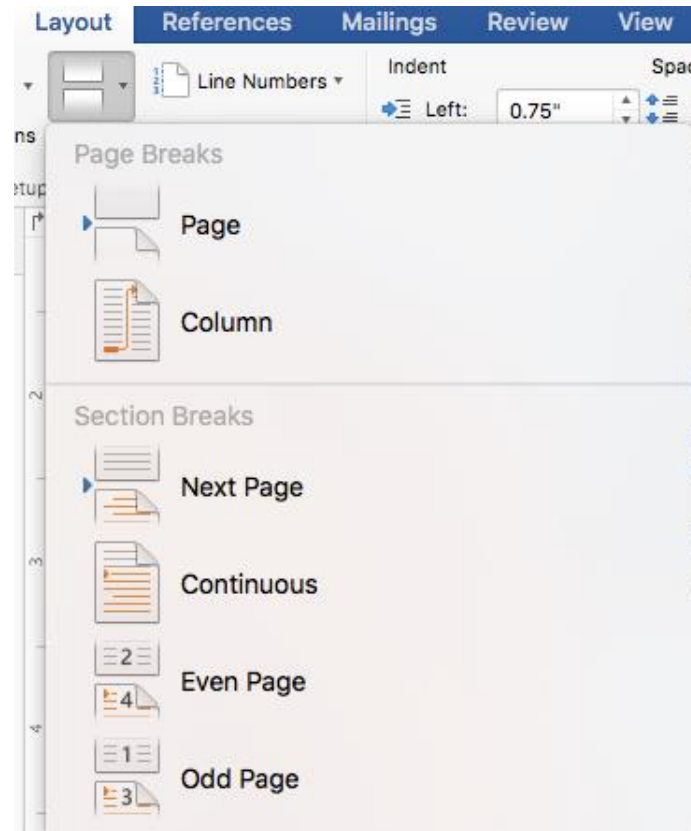


FIGURE 18.1

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**.

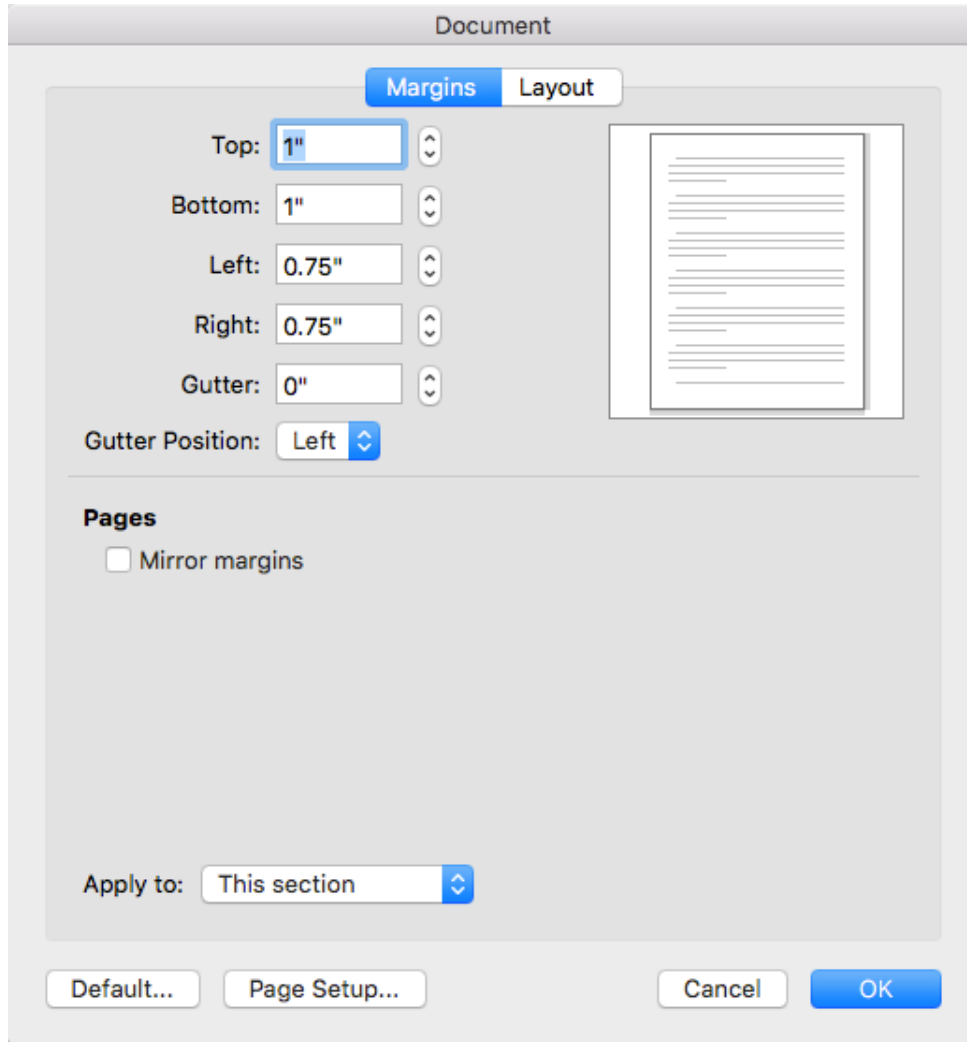


FIGURE 18.2

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.

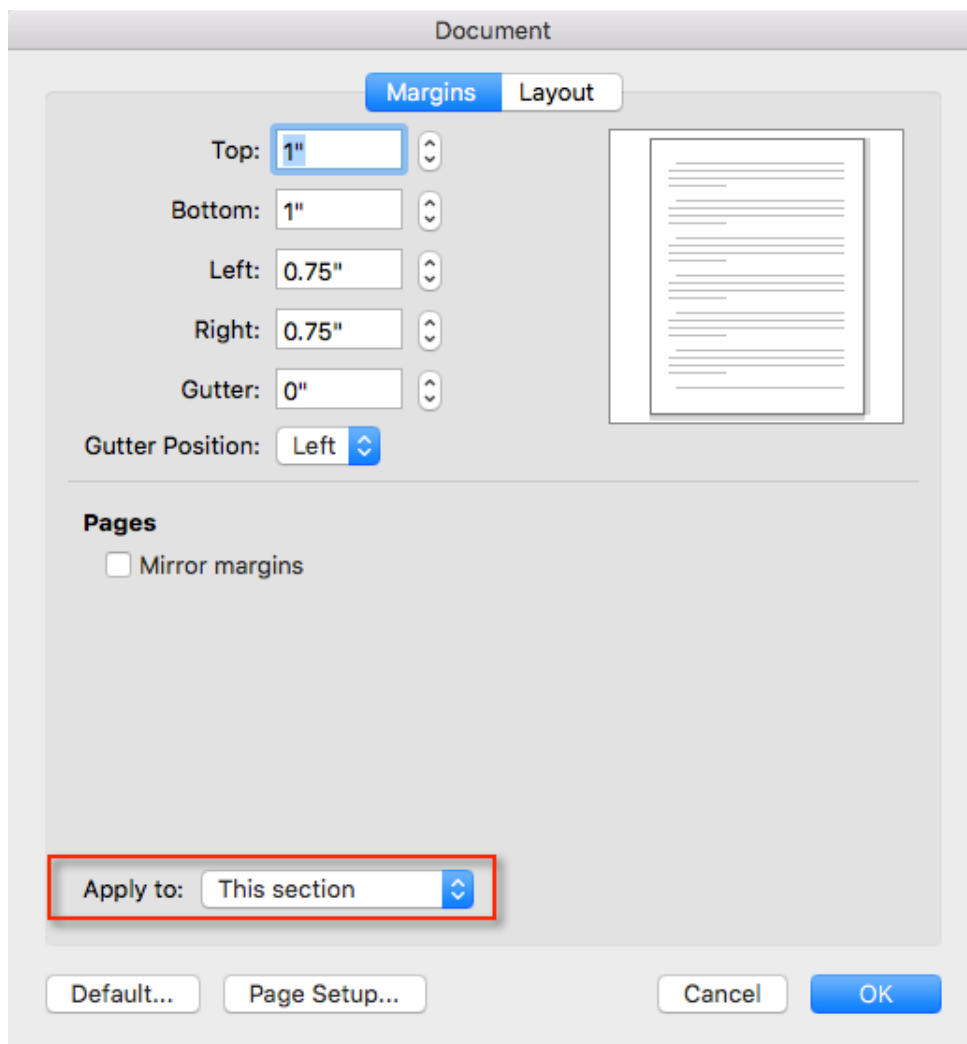


FIGURE 18.3

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.

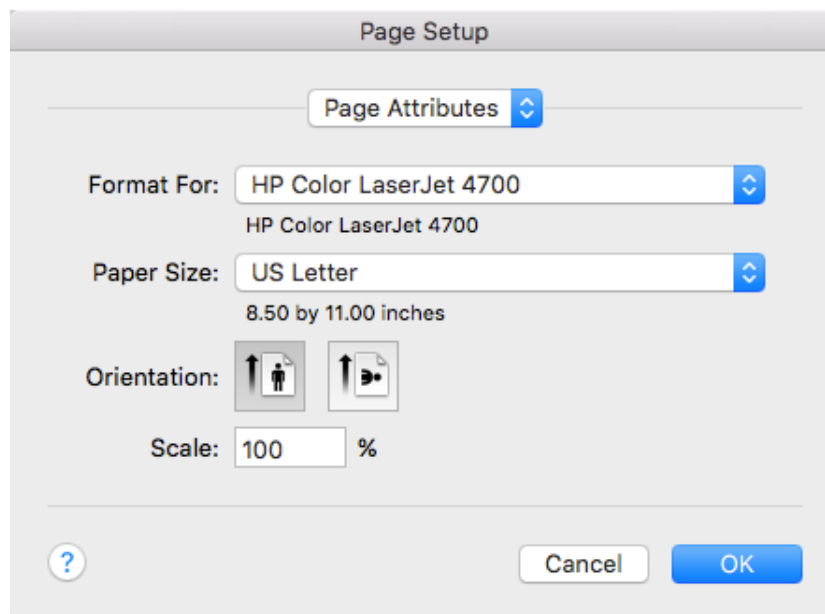


FIGURE 18.4

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.

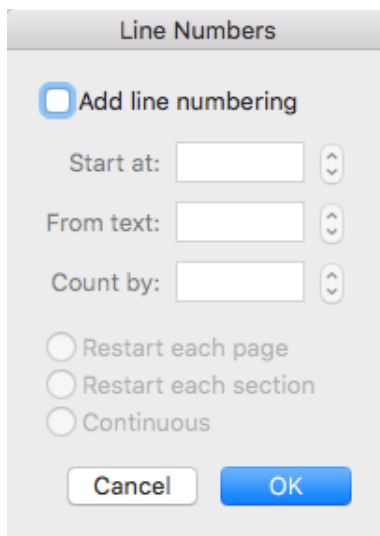



FIGURE 18.5

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

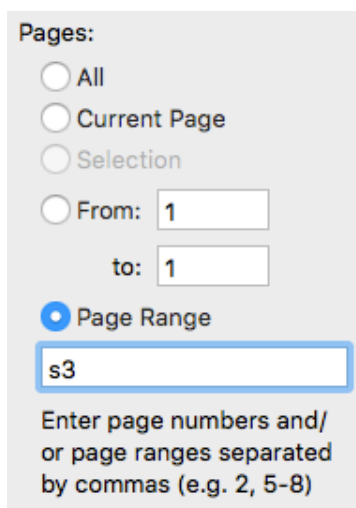


FIGURE 18.6

- 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 18.7



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>

