

Evaluation Copy

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Course Prerequisites

Word 2003 Legal – Module I, which contains instruction on the core tools you will need in order to produce legal documents in Microsoft Word 2003, should be completed first. This training module, *Microsoft Word 2003 Legal – Module II*, assumes you are already familiar with the core tools and consists of the further advanced document editing and handling tools you will need in order to create complex legal documents.

Prior to using this training module, you should be able to do the following:

- Navigate Microsoft Word 2003
- Manage documents
 - Create, save, close and open documents
 - Spell and grammar check documents
 - Print documents
- Edit documents
 - Select, correct and delete text
 - Use undo and redo
 - Move and copy text
 - Collect and paste text
 - Reveal text formatting
 - Work with document views
 - Zoom documents
 - Find and replace text
- Format text
 - Change margin and page size
 - Change line spacing and justification
 - Change fonts
 - Format paragraph tabs and indents
 - Add paragraph numbers and bullets
 - Use the format painter
- Use Help
- Insert dates and times
- Insert symbols and special characters
- Use automated features
 - Use AutoCorrect
 - Use AutoFormat-As-You-Type
 - Use AutoText
- Work with styles
 - Apply predefined styles
 - Create, modify and delete styles
- Use advanced find and replace
 - Replace formatting and special characters
- Work with headers and footers
 - Insert page numbers
 - Add, modify and remove content in headers and footers
- Understand section breaks
 - Add and remove page and text breaks
 - Add and remove continuous and next page section breaks

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Introduction

This training program is designed to make your training experience comfortable and uncomplicated, providing thorough descriptions and step-by-step instructions. You should have a basic understanding of word processing before you begin this training program. This program consists of two modules. You are working in Module II.

Word 2003 Legal – Module I, which contains instruction on the core tools you will need in order to produce legal documents in Microsoft Word 2003, should be completed first. This training module, *Microsoft Word 2003 Legal – Module II*, assumes you are already familiar with the core tools and consists of the further advanced document editing and handling tools you will need in order to create complex legal documents.

This training module is divided into sections containing step-by-step lessons that are followed by practice scenarios. Where appropriate, multiple lessons are combined into one practice scenario. Each section is concluded with a list of notes and new shortcuts introduced.

The step-by-step lessons are provided as a reference tool, and the practice scenarios are provided to allow you to perform the steps in a realistic fashion in the training environment. This training module is concluded with comprehensive exercises. The exercises should be performed individually upon completion of this training program to reinforce the tools learned.

To make this training program relative to your daily work, the practice scenarios are based on both a litigation case and a transactional matter. The practice scenarios are “skits” based on three characters, an attorney, an associate and their legal assistant/legal secretary, and follow workflow in a law office. The practice scenarios and exercise generally proceed in a realistic manner. However, in order to provide the most effective practice scenarios and exercises, some of them may proceed differently than you might actually handle a similar matter in your office.

Because many law firms are either migrating from WordPerfect to Word, or are using both word processing programs, this training program contains references to the differences and equivalencies of WordPerfect and Word. This information is intended to give you a comprehensive understanding of how Word operates in comparison to WordPerfect, helping your transition be as stress-free as possible.

Important Note

Because this training program was designed to simulate realistic document production in law firms, using “save as” or “new from existing” and document sharing tools (including track changes, document compare and merge documents)

are included. You should be aware, however, that using these tools leaves “metadata” in documents. Metadata is, by simple definition, data about data. More specifically, it is hidden information about electronic documents that is automatically created and tracked. To avoid sending metadata to outside parties, it is highly recommended that all documents that must be shared electronically be converted to pdf format (pdf=portable document format and is read by Adobe Acrobat Reader) prior to transmittal. For those documents that are required to be shared in Word format, it is recommended that all metadata be removed. If such documents must include tracked changes or document comparison, a third party tracking/comparison tool should be used.

Methods to remove individual segments of metadata may be found on Microsoft's web site. However, there are several inexpensive metadata removal tools made for use in law offices that remove all or selected segments of metadata at once. These tools can be easily located on the Internet through searches such as “metadata removal” and “metadata scrubber.”

Further, there are third-party tracking tools that will use redline and strikeout to display modifications in and comparisons of documents without leaving metadata. These tools may also be easily located on the Internet through searches such as “redlining tools for word documents” and “blacklining software for word documents.”

Working with Templates

You will learn how to use and create *Word* templates in this section. Templates are a form of automated document creation, including simple forms, automatically updated fields and text prompts, that aid in efficient document production.

This section includes the following lessons:

Using Template Documents

Using Templates Provided by *Word*

Creating Text Only Templates

Creating Interactive Templates

Evaluation Copy

Creating Interactive Templates

Interactive templates contain prompts for data input. In this lesson you will learn to use *Word's* interactive template tools for more advanced document automation.

Lesson Objectives

Create an interactive template

Use an interactive template

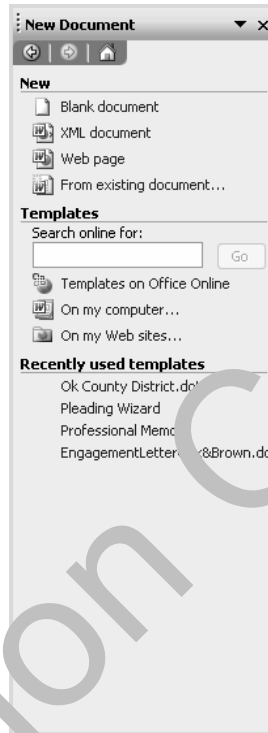
Evaluation Copy

Notes

Steps

1. Click on the following menu sequence: **F**ile → **N**ew.

The *New Document* task pane will appear as follows:


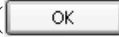


Note: When you are creating a template the title bar will indicate you are working in a template rather than a document.

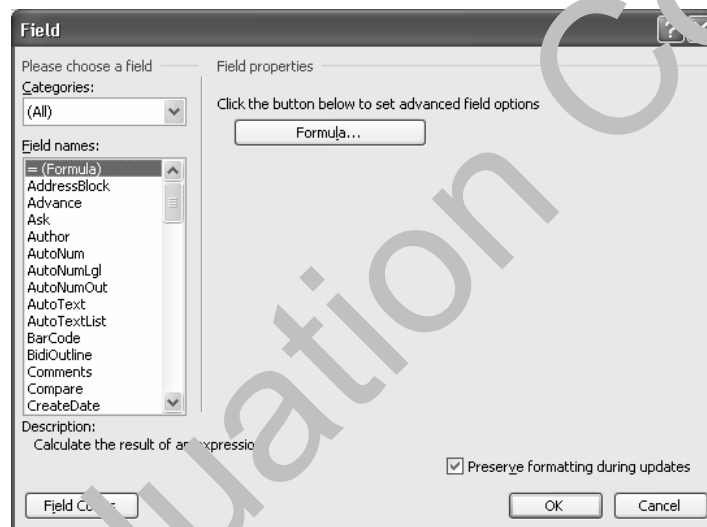
2. Click on the **On my computer** link in the **Templates** section of the task pane.

The *Templates* dialog box will appear as follows:



3. Click on the **Template** radio button in the **Create New** section of the dialog box.
4. Click on the **Blank Document** icon ().
Blank Document
5. Click on the **OK** command button ().
6. Type the desired text for your template.
7. Position your insertion point in the document where you wish to place a prompt or updating field.
8. Click on the following menu sequence: **Insert** → **Field**.

The following *Field* dialog box will appear:




Listing all fields and their uses is beyond the scope of this training program, however, a table listing some commonly used fields follows:

Field	Description
Ask	Prompts you to enter information and assigns a bookmark to represent your response. You must insert a REF or BOOKMARK field after the ASK field where you want <i>Word</i> to print the response in the document

Notes

Note: The file extension for templates is **.dot**, you should not change this but allow *Word* to apply the default extension.

Note: The path that templates are stored in varies depending upon the operating system you are using. To view the path the templates are saved in, click on the following menu sequence: **Tools** → **Options**; click on the **File Locations Tab**, and view the path for **User templates**; you may need to click on the **Modify** command button () to see the complete path.

Automatic Numbering

There are multiple methods for applying automatic numbering in *Word* documents. In this section you will work with all the methods and learn to determine where each method is most appropriately applied. The automatic numbering tools in *Word* function very different than those in *WordPerfect*. Understanding these numbering tools is key for efficiently creating legal documents in *Word*.

This section includes the following lessons:

Single-level numbering

Multi-level Numbering

Numbering with Styles

Numbering within Paragraphs

Numbering with Sequence Fields

Multi-level Numbering

Use the outline numbering tool for lists with multiple levels. You may use *Word's* predefined numbering formats, including the Legal Numbering format, or customize them to meet your needs.


Lesson Objectives

Use Predefined Numbering formats

Customize Multi-level numbering formats

Share Customized Automatic Numbering

Evaluation Copy

24. Type the following: **CLE Policy** and press the **Enter** key.
25. Press the **tab** key to demote the **c)** to **i)**.
26. Type the following: **Partners** and press the **Enter** key.
27. Type the following: **Associates** and press the **Enter** key.
28. Click on the **Decrease Indent** () button *two* times to change the **iii)** to **4)**.
29. Type the following: **Billing Requirements for Interns** and press the **Enter** key.
30. Press the **Backspace** key to discontinue automatic numbering.
31. Save the document as **cbDtlAgn.doc** in the **C&B** folder using your favorite file save method.
32. Keep the **cbDtlAgn.doc** file open for use in the next practice scenario.

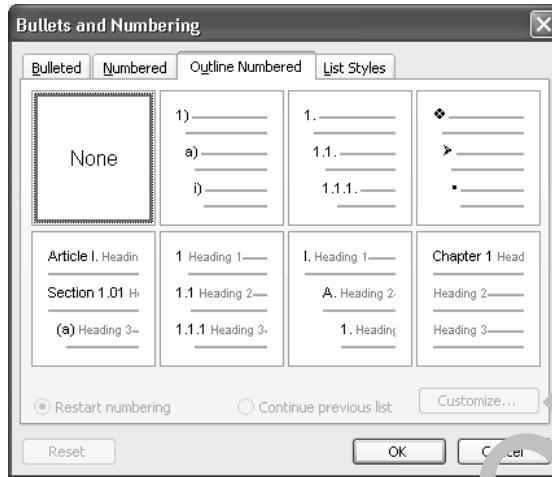
Customizing Multi-level Numbering

Steps

1. Click on the following menu sequence: **Format** → **Bullets & Numbering**.
The *Bullets and Numbering* dialog box will appear.
2. If necessary, click on the **Outline Numbered** tab.

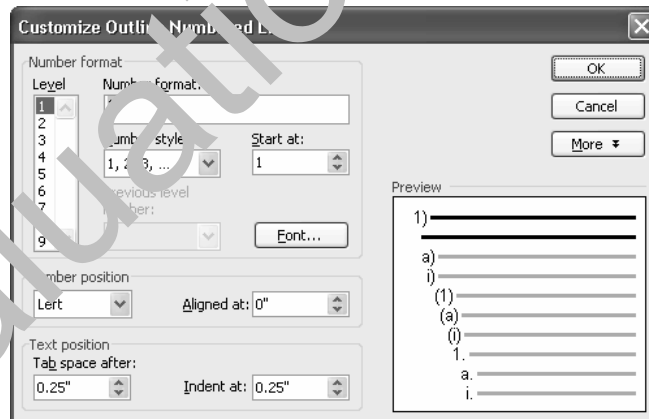
Notes

The *Bullets and Numbering* dialog box will appear as follows:



3. Click to select the numbering format that most closely resembles your desired numbering format
4. Click on the **Customize** command button ().

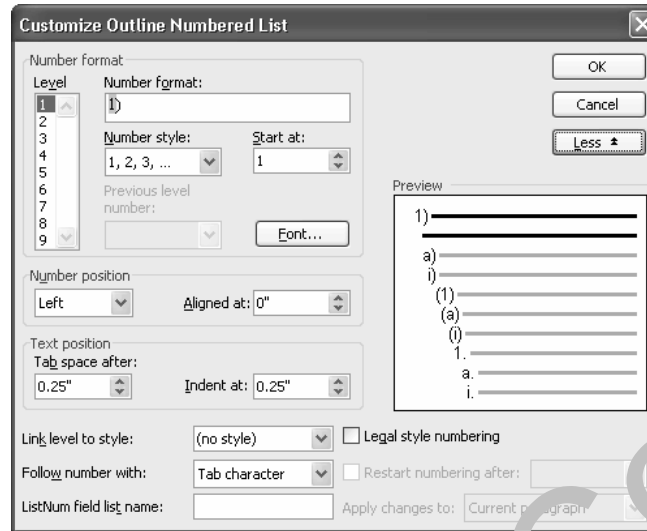
The following *Customize Outline Numbered List* dialog box will appear:



5. Click on the **More** command button () to expand the available options.


Notes

The expanded *Customize Outline Numbered List* dialog box will appear as follows:



The following table describes the *Custom Numbering* options:

Item	Description
Level	Click on the level of the outline you wish to modify
Number format	Type additional text to go with a number, e.g. parenthesis (), or periods .
Number style	Select the desired number type; the Preview window will reflect the current selections
Start at	Change the starting value
Previous level number	Include a number from the previous level (e.g. A3); this will include the number from the previous level but not any text from the previous level
Font	Open the font dialog box to change the font of the numbering scheme, <u>not</u> the text after the numbers
Number position	Select alignment of the number
Aligned at	Select the spacing position to align the numbers at

Note: To designate the paragraph text to begin with underlined characters and the paragraph number to contain no underline, click on the **Font** button () in the *Customize Outline Numbered List* dialog box, click on the **Underline** drop-down arrow and select **None**.

Generating Cross-References, Tables of Contents and Authorities

Generating automatic references in *Word* includes cross-references, tables of contents and tables of authorities. These automatic referencing tools in *Word* are accomplished using *fields*. (Fields were introduced in the *Templates and Automatic Numbering* sections of this training program). These fields are automatically inserted when you use *Word's* reference tools and can be updated as your document changes.

This section includes the following lessons:

Creating Cross-References

Creating a Standard Table of Contents

Creating Custom Table of Contents

Updating Table of Contents

Creating Table of Authorities

Creating Standard Tables of Contents

A standard table of contents can be easily created in *Word* based on *Word's* built-in heading styles. In other words, if you use the *Heading 1* through *Heading 9* styles in your document, the table of contents will be generated based on the text the headings are applied to. Unlike *WordPerfect*, there is no “marking” necessary when using these styles to create tables of contents.

Lesson Objectives

Create a table of contents based on heading styles

Evaluation Copy

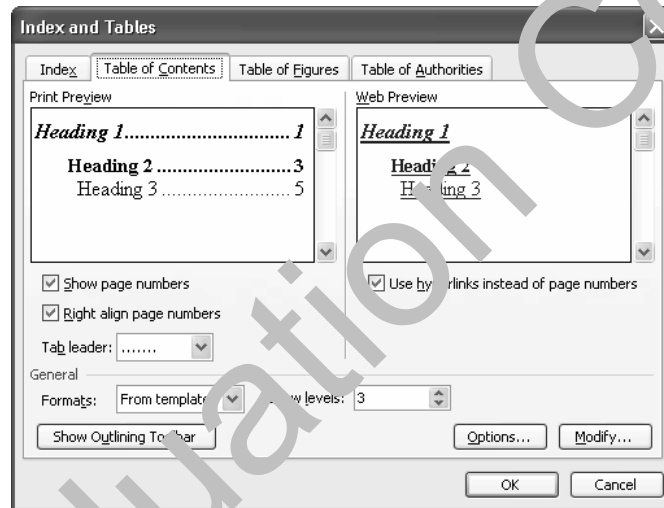
Steps

1. Create your document using *Word's* built-in *Heading 1* through *Heading 9* styles.
2. Position your insertion point where you wish to generate the table of contents.
3. Click on the following menu sequence: **Insert** → **Reference** → **Index and Tables**.

The *Index and Tables* dialog box will appear.

4. Click on the **Table of Contents** tab.

The *Index and Tables* dialog box will appear as follows:



The following table describes the *Index and Tables* dialog box options.

Item	Description
Show page numbers	Select to display the corresponding page numbers on the table of contents
Right align page numbers	Select to right-align page numbers
Tab Leader	Select desired tab leader to appear between table of contents entry and corresponding page number

Notes

Note: You will need to type the Table of Contents title as it is not automatically created.




Note: Remember to insert a Next Page Section break so the document text will be in a different section than the Table of Contents. If necessary, in the Table of Contents section change your page numbering options to i, ii, iii; in the document section change your page numbering options to 1, 2, 3 and start numbering at 1.

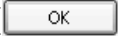
Notes

Note: To edit a table of contents entry, click on the entry in the table of contents and edit. To move to the paragraph of the entry, **Ctrl-click** on the table of contents entry.

Note: Your Table of Contents will appear as a field that can be updated by pressing the **F9** shortcut key.

Note: If you manually edit a table of contents entry it will revert back when you entire table is updated.

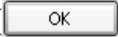
Item	Description
Use hyperlinks instead of page numbers	Displays items as hyperlinks in web layout view for quick navigation
Formats	Select table of contents style
Show levels	Select the number of heading levels to appear in the table of contents
	Display the outline toolbar
	Select styles associated with table of contents level
	Modify the style associated with the table of contents level

5. Make the desired selections using the options described above.
6. Click on the **OK** command button ().

Practice Scenario

Robbie Rainmaker: I need a table of contents for the *White Shareholders Agreement* and I also need one for the *Taylor Shareholders Agreement* but the *Taylor* one I want to look...you know...a little different...see what you can come up with.

Sally Slick: Okay, I'll do one and let you see it.

1. Open the **whiShrAg.doc** file from the *White* folder using your favorite file open method.
2. Click on the following menu sequence: **Insert** → **Break**.
3. Click on the **Next page** section break radio button and click on the **OK** command button ().
4. Press the **Ctrl-Home** shortcut key combination to go to the beginning of the document in Section 1.
5. Type the following heading: **TABLE OF CONTENTS** and press the **Enter** key.

Entering Table Data

Entering and editing data in *Word* tables is a simple process. There are many available shortcuts to help you quickly navigate tables.

Lesson Objectives

Navigate tables

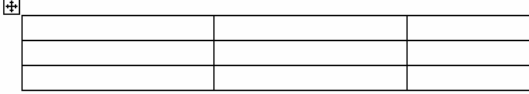
Enter data into tables

Evaluation Copy

Notes

Navigating within a Table

The following table describes the methods of table navigation:

Keystrokes	Action
Tab	Move to next cell; add additional row if pressed from the last table cell
Shift-tab	Move to previous cell
↑	Move to the preceding row
↓	Move to next row
Alt-Home	Move to first cell in current row
Alt-End	Move to last cell in current row
Alt-Page Up	Move to first cell in current column (row 1)
Alt-Page Down	Move to last cell in current column (last table row)
Hover mouse pointer over top border of column until it changes to a heavy down arrow (↓) and click once	Select entire column
Hover mouse pointer at the left border of a row until it changes direction to the right (→) and click once	Select entire row
Hover mouse pointer over upper left-hand corner of table until it changes to the four-sided arrow (⛶) and click	Select entire table; apply formatting; or drag to move entire table
	
Hover mouse pointer over lower right-hand corner of table until it changes to resize handle (⛶), click and drag	Resize entire table

Notes

Keystrokes	Action
Hover mouse pointer over any column or row border until it changes to a two-sided arrow (↕, ⇄), click and drag	Resize row height or column width

Entering Data into Table Cells

1. Position your insertion point in the cell where you wish to insert data.
2. Type information in cell.

Note: When you are working in a table, there is no need to press the **Enter** key at the end of a line, unless you want the line to break (hard return).

Practice Scenario

Doris Daylight: This delivery is for you.

Sally Slick: Thanks.

Sally Slick: °°° I need to prepare an Expense Reimbursement Invoice for Joe.

1. Open the **cbExReim.doc** file from the *C&B* folder.
2. Save the document as **cbExReim.doc** in the *Green* folder using your favorite file save as* method.
3. Press the **Ctrl + End** shortcut key combination to position your insertion point at the end of the document.
4. Click on the **Insert Table** button (📊) on the standard toolbar to expand the table-create grid.
5. Drag down 2 blocks and drag right 4 blocks, then release the mouse to create a 2 x 4 table.

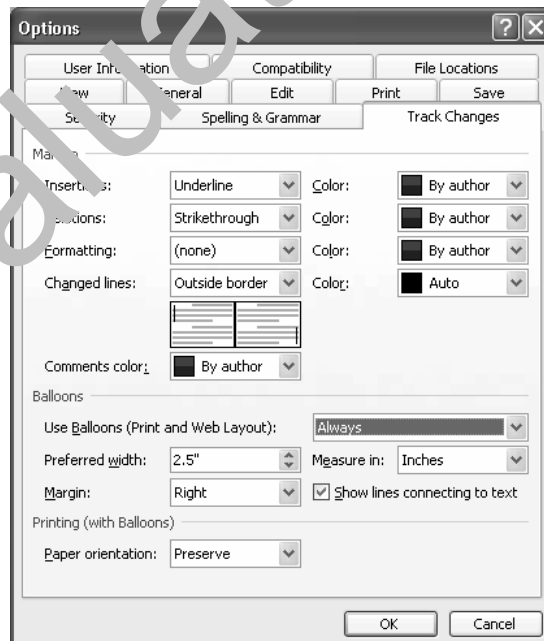
Note: The table grid will contain 2 rows and 4 blocks as shown below.

* See important note regarding metadata on page 1.

Turning On Track Changes

Steps

- Do one of the following to turn on the track changes tool:
 Click on the following menu sequence: **T**ools → **T**rack Changes;
 Click on the **Track Changes** button (🔍) on the reviewing toolbar;
 Press the **Ctrl-Shift-E** shortcut key combination; *or*
 Double-click on the **TRK** button (TRK) on the status bar.
- Make your changes to the document and the changes will be displayed for you as you type in a red-lined format.
- To modify the format of your tracked changes, click on the following menu sequence: **T**ools → **O**ptions.
 The *Options* dialog box will appear.
- Click on the **Track Changes** tab.
 The *Options* dialog box will appear as follows:



Using Mail Merge

Word's Mail Merge tool is the equivalent of *WordPerfect's* merge tool. It is used to automate the process of creating form letters, mailing labels, envelopes and catalogs. Mail merge consists of creating the *main* document – the form letter, envelope or label format – and merging it with the *data source* – the unique information, such as names and addresses, that will be deposited into designated places in the main document.

Lesson Objectives

- Create form letters and data sources
- Create mailing labels
- Create envelopes

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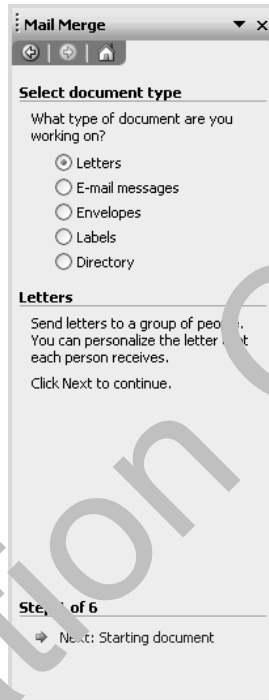
Notes

Using Mail Merge to Create Form Letters

Steps

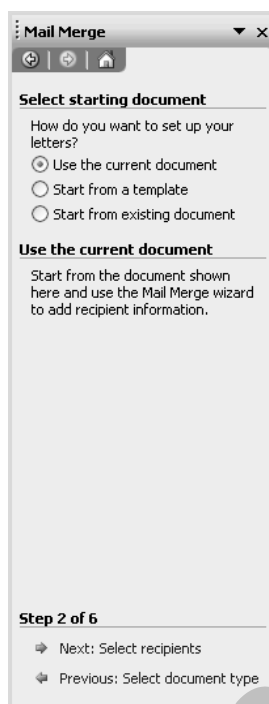
1. Click on the following menu sequence: **T**ools → **L**etters & **M**ailings → **M**ail Merge.

The *Mail Merge* task pane will appear as follows:



2. Click on the **Letters** radio button in the task pane.
3. Click on the **Next: Starting document** link at the bottom of the task pane.

The *Mail Merge* task pane will appear as follows:

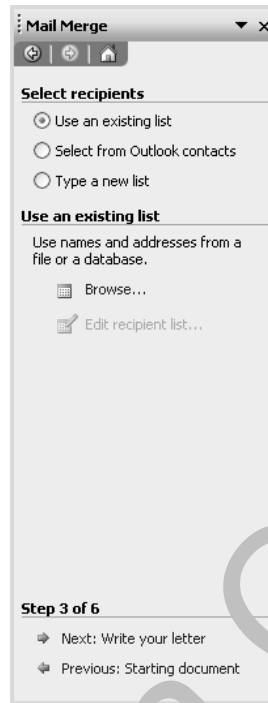


4. Do one of the following to select the form's main document:
 - Click on the **Use the current document** radio button to use the document in the current window as the form's main document;
 - Click on the **Start from a template** radio button to use a *Word* template as the form's main document, then click on the **Select template** link to select the template; *or*
 - Click on the **Start from existing document** radio button to use an existing document as the form's main document, then click on the **Open** (Open...) command button to locate the document.

Click on the **Next: Select recipients** link at the bottom of the task pane.

Notes

The *Mail Merge* task pane will appear as follows:



6. Do one of the following to select the recipients:
 - Click on the **Use an existing list** radio button; then click on the **Browse** link to locate the list file and proceed to step 4;
 - Click on the **Select from Outlook contacts** radio button, then click on the **Choose Contacts Folder** link to select the appropriate contact folder and proceed to step 4; *or*
 - Click on the **Type a new list** radio button; then click on the **Create** link to use the *New Address List* dialog box and follow the substeps below.

Notes

- a. Customize the form to contain the fields you wish to use by clicking on the **Customize** command button ().

The following *Customize Address List* dialog box will appear:

- b. Remove fields you do not wish to use by clicking on the field name in the **Field Names** list and clicking on the **Delete** command button ().
- c. Type additional field names you wish to use by clicking on the **Add** command button () and typing the field name as prompted.
- d. Change the order of the field names by selecting the field name you wish to move in the **Field Names** list and clicking on the **Move Up** () or **Move Down** () command buttons.

Note: The most commonly used field names are displayed in the *New Address List* dialog box.

Converting WordPerfect Documents

The need to convert documents from *WordPerfect* to *Word* is common in law firms. It is important to note that conversions can cause several problems in your *Word* documents, including terrible formatting problems and document corruption. Therefore, it is crucial to use the methods described herein rather than using the built-in conversion filters.

Lesson Objectives

- Convert documents if you have WordPerfect installed on your computer
- Convert documents if you do not have WordPerfect installed on your computer

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