



SAN DIEGO COUNTY
BAR ASSOCIATION

Microsoft Word Settings for Legal Professionals

SET THE BAR **HIGHER.**[™]

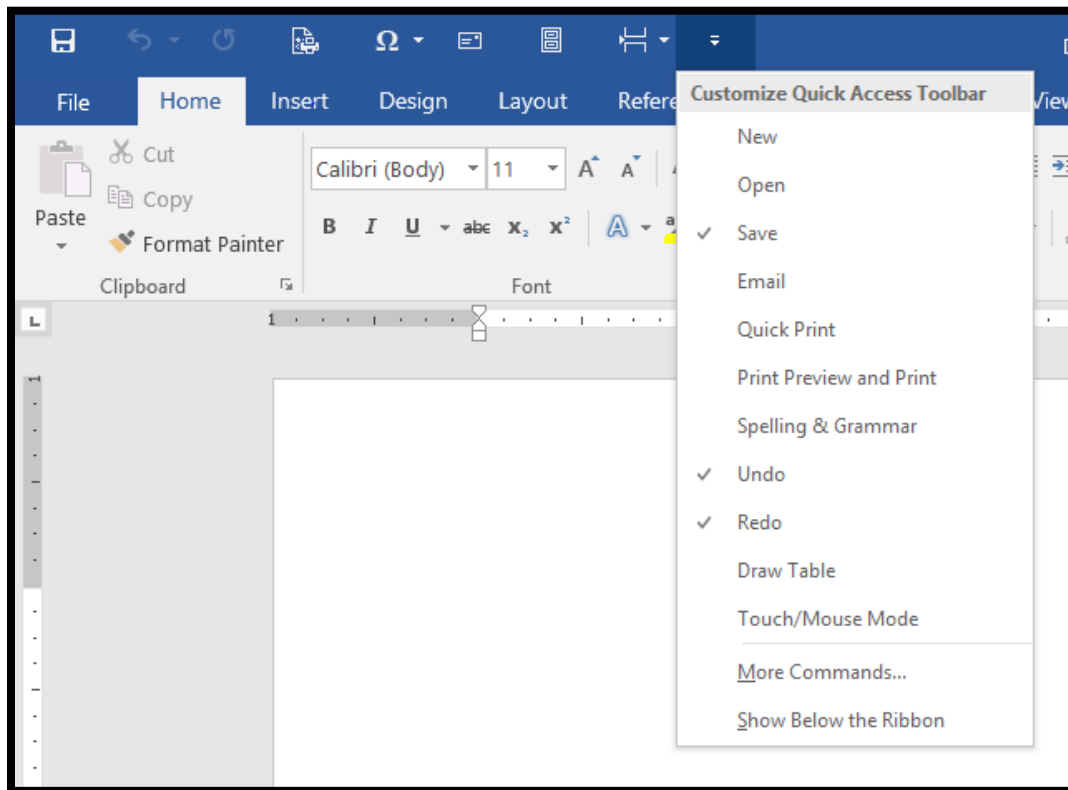
1.

Turn features off or on; alter the way Word behaves

Many of these settings are on under **Files > Options**. The **Options** command will display a screen that contains several tabs where you can control Word's behavior. Below are some important settings you may consider changing.

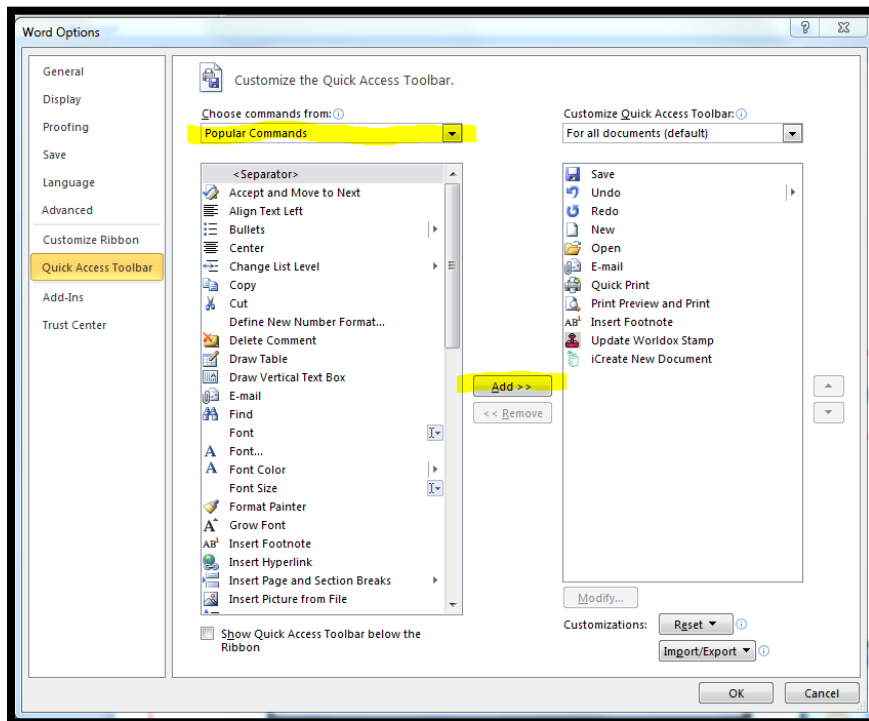
Customize the QAT (Quick Access Toolbar) with your most accessed/needed shortcuts (New, Open, Save, Close, Spellcheck, Show/Hide Formatting marks, etc).

- Click on the arrow to the right of the QAT to add useful shortcuts such as “New” and “Open”



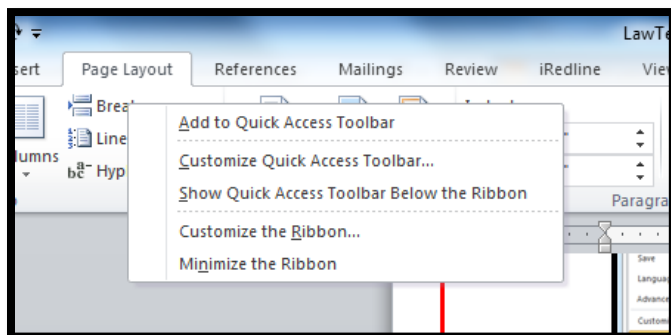
The QAT will quickly run out of screen real estate in its default location. You may opt to choose “Show Below the Ribbon” from the dropdown menu to move the QAT below the Ribbon.

On the “Customize Quick Access Toolbar” drop down you will see an option for “More Commands”. Clicking it will display a comprehensive list of the hundreds of commands available in Word.



You may want to add the “Shrink one Page” button to your QAT. In the dialog box shown above, change the option that says “**Popular Commands**” to “**All Commands**” > scroll down to “**Shrink One Page**”, select it and click the “**Add**” button. Now, the ‘Shrink One Page’ button is always available on your QAT.

Look for and add the “Email as PDF” button – very handy!
To quickly add a button from any Ribbon simply **Right-Click** on any button/command on the toolbar and select **Add to Quick Access Toolbar**



Turn on Rulers for showing page and paragraph margins.

- Go to the VIEW Tab, place a check in the “Ruler” box of the Show/Hide section

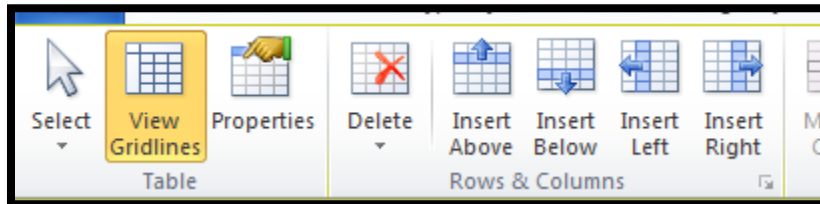
Turn on Gridlines in Tables

Gridlines are set to OFF by default in Word making it hard to spot a table in a document. You'll want to turn them on once.

1. In a brand new blank document go to Insert > Table and insert any table of any size (it's temporary so just add any number of rows and columns).
2. The Tables Ribbon will appear
3. Click on the Layout subtab to show the Layout Ribbon for Tables



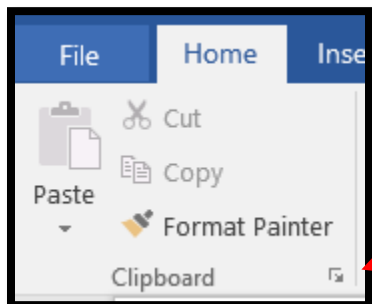
4. Simply click “View Gridlines” to activate them. It might not look like anything happened but you have set the gridlines “on”



Turn on Clipboard and set all options on (Check them all)

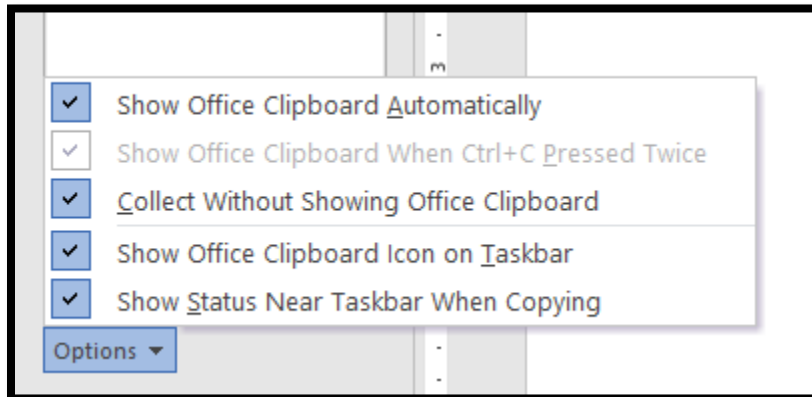
The Microsoft Office Clipboard allows you to copy and collect up to 24 items from Office documents or other programs and paste them into another Office document. It needs to be turned “on” for maximum functionality and efficiency. You need only do this once.

1. On the **Home** tab, in the **Clipboard** group, click the **Clipboard** Dialog Box Launcher.



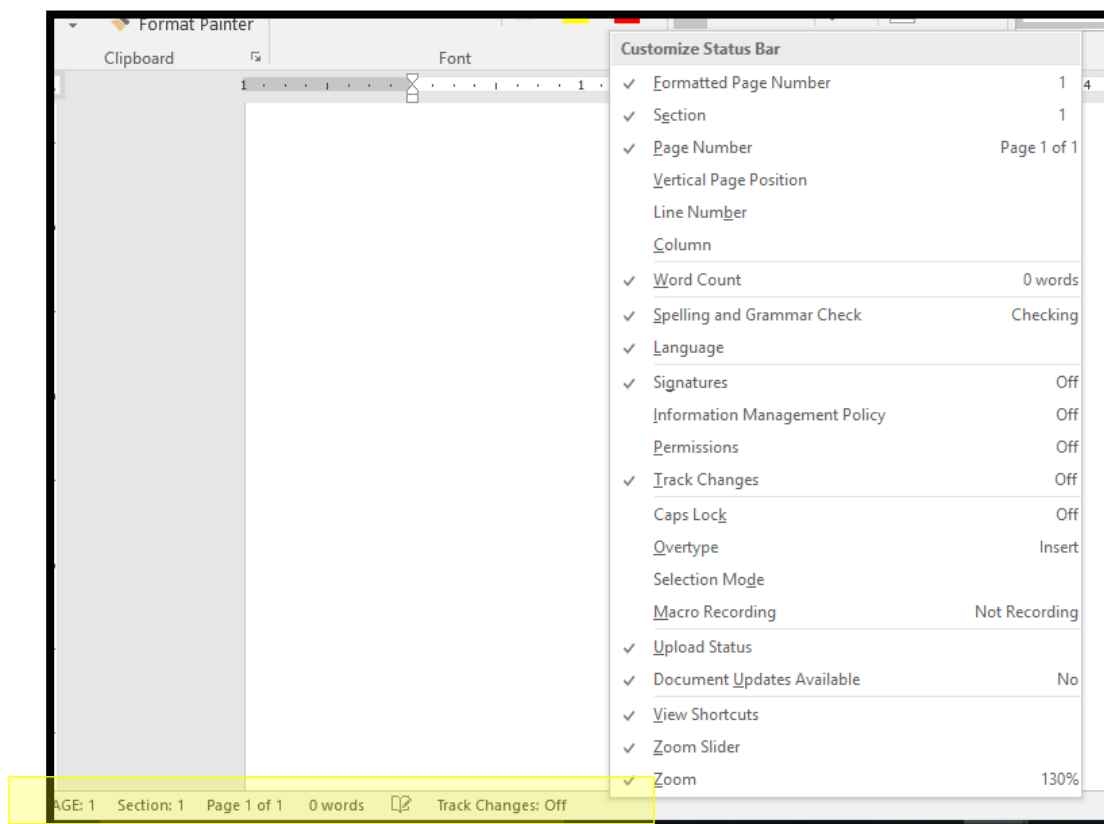
2. In the Clipboard task pane, click Options as shown below, click all unchecked options (check everything). The Clipboard is now active

and available in the other Microsoft Office programs (Excel, Outlook and PowerPoint)



Display More Status Items On The Status Bar

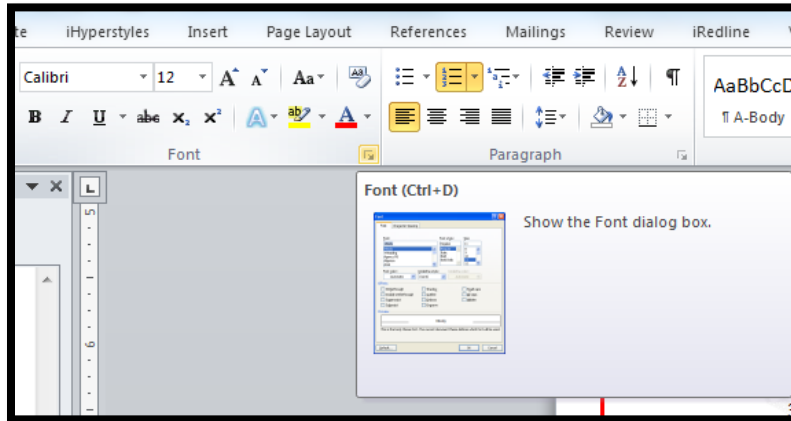
- Right click on the Status Bar and be sure the first 3 options are checked. (Formatted Page Number, Section, Page Number)



Change the Default Font and Line Spacing for All New Documents

(Your IT Department may have already set this in your firm templates and you may not be able to change these settings.)

1. If you do not have a document open, create a *new* document that is based on the Normal template. To do this press CTRL + N or File > New
2. In the **Font** group, click the **Font** flyout button in the bottom right hand corner.



3. Select the options that you want to apply to the default font, such as font style and font size. If you selected specific text, the properties of the selected text are set in the dialog box.
4. Click the **Set As Default** button in the left hand corner of the dialog box.
5. Select the **All documents based on the Normal.dotm template** option, and then click **OK**.
6. Do the same for Paragraph customizations by following the same steps except in the Paragraph dialog box.

Configure Advanced Settings

For the following section – you will go to File> Options in Word.

Under “Proofing” options

Turn off the “Ignore Words in All Caps” setting in spellcheck.

- File > Word Options > Proofing section.

Set Autocorrect Options

Also, while here, go to the AutoCorrections dialog box and delete the quick correct that turns this (c) into this © same for ® symbol.

Uncheck “Mark grammar errors as you type”. This will eliminate the green squiggly lines in legal documents with a lot of legal language.

OPTIONAL - Uncheck/Check “Check grammar with spelling”. Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

Under “Save” options

Change “Save AutoRecover information every” option to 2-5 mins.

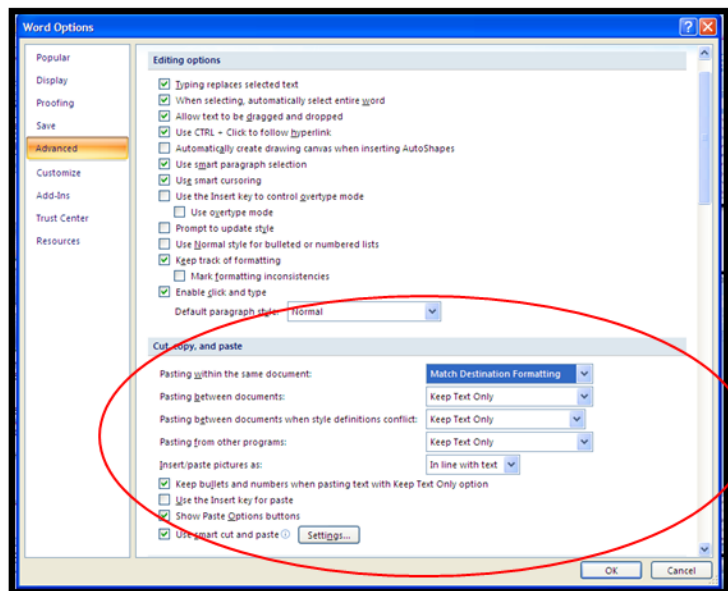
Under “Advanced” options

Editing options (the first section of this window)

- Uncheck “When selecting, automatically select entire word”
- Uncheck “Automatically create drawing canvas when inserting AutoShapes”.
- Uncheck “Use smart paragraph selection.”

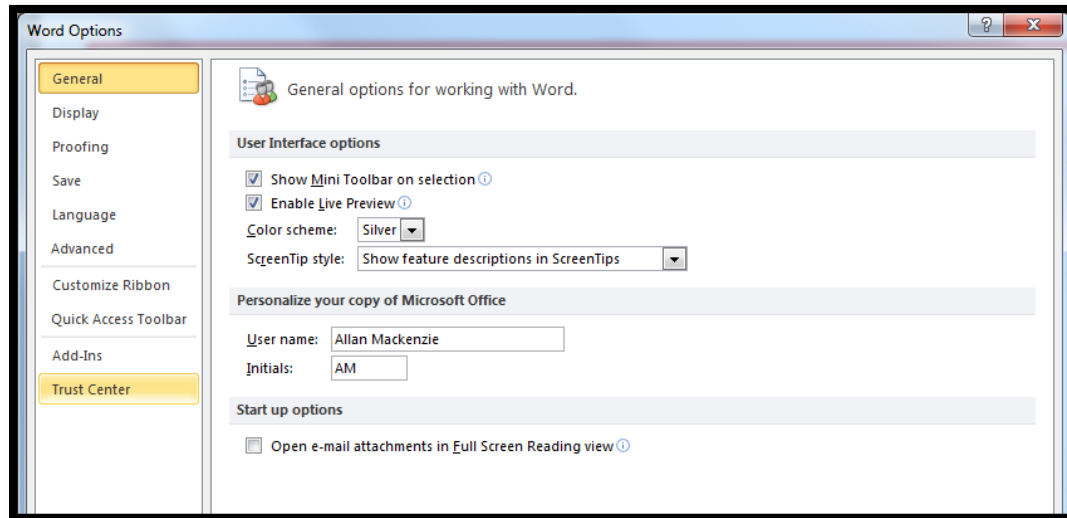
Set your default paste to TEXT ONLY.

Under the **Cut, copy, paste section** set options as show here.

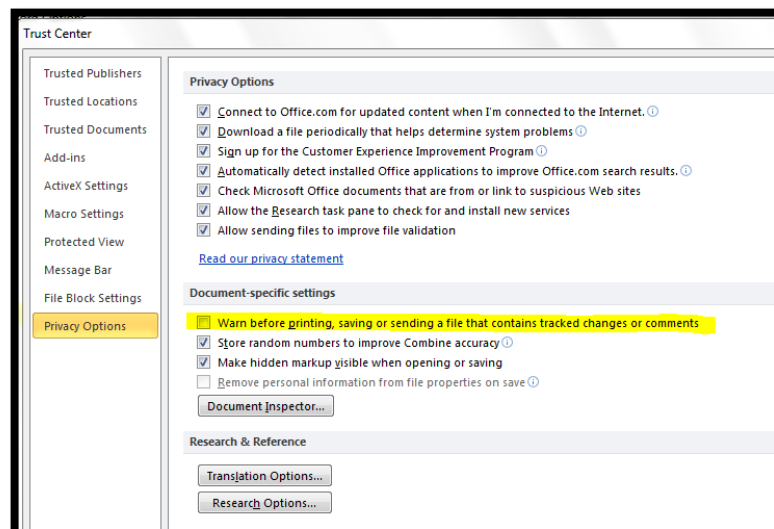


Get Warnings About Documents with Track Changes

- File > Options > From the Word Options dialog, choose Trust Center > Trust Center Settings > Privacy Options.



- In the "Document-specific settings" section, tick the box "Warn before printing, saving or sending a file that contains tracked changes or comments".
- You may also want to check "Make hidden markup visible..." and "Remove personal information from file..."



2.

AUTOMATE FREQUENTLY USED TEXT AND COMMONLY MISPELLED WORDS

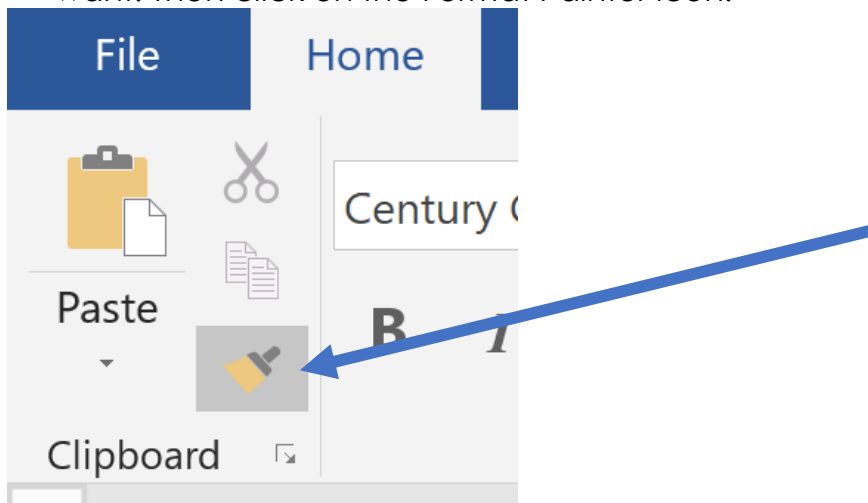
AutoText is a way to store and quickly insert text, graphics, fields, tables, bookmarks, and other items that you use frequently. Word comes with a library of AutoText entries (see the items listed under AutoText on the Insert menu or turn on the AutoText toolbar, then click on All Entries). You can create your own. It can be found under Insert > Autotext.

3.

THE FORMAT PAINTER

The Format Painter icon can be used to copy character or paragraph formatting from one portion of text to another.

1. Click in the paragraph (or word) that is formatted the way you want. Then click on the Format Painter icon:



2. Click on the word you want to copy the formatting to, or for multiple words, drag to select the portion of text.

To copy the formatting multiple times, click in a portion of text with the formatting to be copied, double-click on the Format Painter icon, and copy the formatting as many times as you want. When you've finished, click the format painter icon once again to de-select it.

4.

KEYBOARD COMMANDS SAVE TIME

Press [Alt] plus the letter that's underlined to open a menu, such as File, Edit, View, and so on. Once a menu is open, you don't need to press [Alt] to select a command; just press the underlined letter of the command you want to select.

5.

Quickly Select Word and Paragraphs

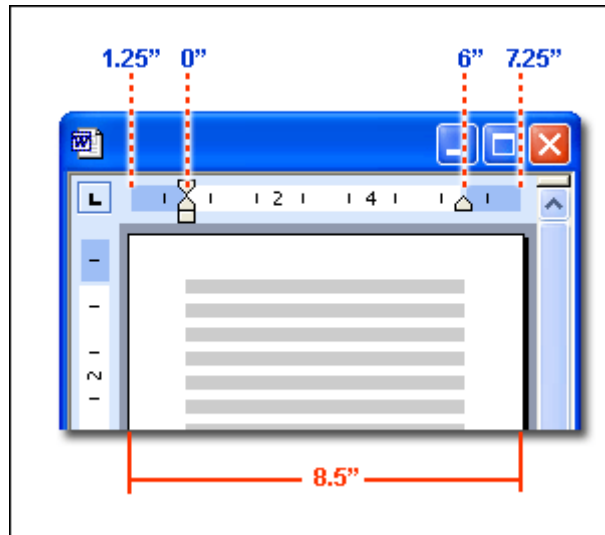
- Double-click a Word
- Triple-click a paragraph
- Triple-click in the left margin to select the entire document
- Point and click to select one line
- Select multiple, non-contiguous words by holding [Ctrl] and double-clicking

6.

Understand Indents and Spacing

- "Alignment" - chooses the alignment of the selected paragraph.
- "Indentation" - sets inches from the left or right margin of the paragraph.
- "Before" and "After" - determines the spacing before and after each paragraph.
- "Line Spacing" - adjusts the spacing between each line in the paragraph.

7. Working with Tabs

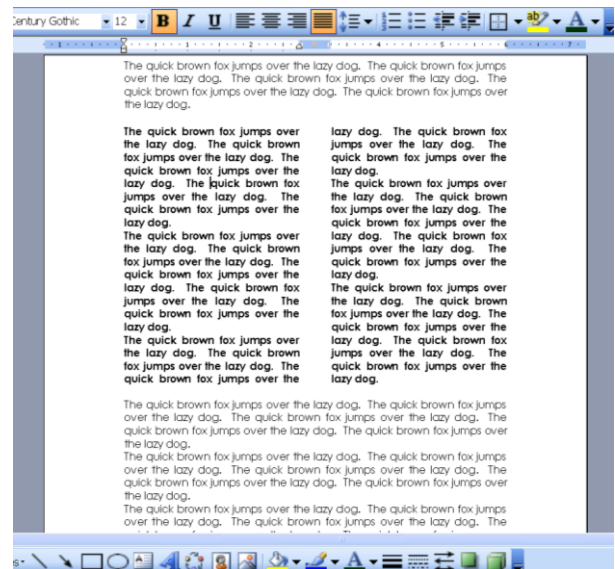


Word sets all tabs every .5 inches by default. To override those settings click and hold a spot on the top ruler. As soon as you click, a short "L" will appear with a dashed line projecting down the document. This "L" is your tab. Just drag the tab to your desired position and the tab will be set.

8. USE COLUMNS

To create newsletter-style columns:

1. Be sure to be in "print layout" view
2. Select the text you want to format in columns:
3. On the Standard toolbar, click Columns
4. Drag to select the number of columns you want.



The End.