

LegalTech

# Word to Your Lawyer

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The title may lead you to believe that I am hip like a rap star, but my personality leans a little more toward “White & Nerdy”<sup>1</sup> than it does to Snoop Dogg. Until my Klingon translations of Shakespeare really take off, I’ll just have to stick with the more mundane (and yet infinitely more practical) advice of using technology in a law office. This issue we’ll cover the best features of Microsoft Word 2010.

## Page Numbering

So aggravating is the process for complex page numbering of Word documents, that I have publicly lambasted it (well, on Facebook, anyway). In fact, the main reason for writing this article was so I could force myself to figure it out.

If you have a twelve page document, and you want it numbered in the ordinary way, page numbering is simple: click the *Insert* tab, click *Page Number* from the Header and Footer block, and choose the option that best suits your needs (I typically choose the center at the bottom of the page).

If you don’t want the page number to appear on the first page, click the *Insert* tab, click *Footer*, and *Edit Footer*. In the *Design* tab, click the *Different First Page* checkbox. Page one has no page number, and page two starts with the number two.

Here’s where it gets a little complicated, and where my frustrations have manifested. When I draft a pleading, I want everything in the same document—the motion, memorandum, proposed order and certificate of service. That means no page number on the first pages of the motion, memorandum and proposed order; no page number at all on the certificate of service (unless it is more than one page), and the sequence of numbering must be different for the motion, memorandum and proposed order. In WordPerfect, this was a simple matter. In Word, you have to use a specific type of page break to tell the computer that you are, in effect, creating different documents within a document. Here’s how:



1. Open up your new document.
2. Insert your page numbers as usual.
3. Draft your document. When you get to a new “document” within your document, don’t just start it on a new page, but click the *Page Layout* tab, click *Breaks*, and click *Next Page*.
4. Double-click on the second “document’s” page number in the footer (right now, it should be a continuation of the first “document’s” page number).
5. Click the *Insert* tab, click *Page Number*, and *Format Page Numbers*. Under *Page Numbering*, change it to read “Start at 1.”
6. If you don’t want a page number to appear on the first page of your second “document,” then follow the same process as above — go to the footer button click the *Different First Page* checkbox in the *Design* tab.

## Automatic Numbering

My biggest word processing pet peeve often happens when I have to edit a document that someone else wrote — say, a 100-paragraph complaint. “It needs a new paragraph inserted between numbers two and three,” I say to myself. Move the cursor to the end of paragraph two, hit return. Blank space. No new number three. I have to renumber the whole document.

Automatic numbering is simple: on the *Home* tab there are three buttons: *Bullets*, *Numbering* and *Multilevel list*. Click the arrow to the right of whichever type you want to use to select your option, or select the option to define a new format. If you want the second and later lines in any

<sup>1</sup> Weird Al Yankovic: <http://www.youtube.com/watch?v=N9qYF9DZPdw>.

particular paragraph to hang back to the beginning of the margin, right-click on the number, select *Paragraph*, and click *None* under the *Special* column.

As a bonus, you can use Word to create outlines (particularly helpful when I'm putting together research and organizing motions). Click the *Multilevel List* and use one of the templates, or create your own.

## Splitting Documents

Oftentimes I need to refer to a prior page in a document when working on a later page. This might be because I'm trying to copy my motion's title (without formatting and in title case) on my certificate of service; because I need to refer to my statement of undisputed facts to copy citations for my argument in a summary judgment motion; or because I need to figure out what pages my case citations are on to incorporate them into my appellate brief's list of cases. Click on the *View* tab, and click the *Split* button. Then, click on your document where you would like the split to show up. You can also change the page view of either window, for example, to make it show multiple pages (also on the *View* tab). To put the document back to normal, click *Remove Split*.

## Redlining Documents

Rule 2-341(e) of the Maryland Rules requires:

*Highlighting of Amendments.* Unless the court orders otherwise, a party filing an amended pleading also shall file at the same time a comparison copy of the amended pleading showing by lining through or enclosing in brackets material that has been stricken and by underlining or setting forth in bold-faced type new material.

Curiously, this rule, based on Local Rule 103(6)(c) of the Rules of the United States District Court of the District of Maryland, applies to circuit court cases, but there is no counterpart for district court cases. Perhaps the Rules Committee figures that district court practice is too fast-paced to warrant this protocol. I bet if they knew how easy it was to comply, they would change their tune.

Some people try to do this manually — going through a pleading, selecting a portion to be excised, right-clicking it, selecting *font*, and then clicking *strikethrough* to show a deletion. Try doing that in a 100-paragraph pleading. If you want an easier way, this is it:

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1. Find your original pleading. Open it up.
2. Under the *File* tab, click *Save as*. Name it something easy, like "P's Amd. Complaint (07-24-11)."
3. Click the *Review* tab.
4. Click *Track Changes*.
5. Also in the *Review* tab, make sure your settings are correct — I usually click *Show Markup* which brings up a drop-down menu. Select *Balloons* and click *Show only Comments and Formatting in Balloons*. This makes formatting changes (underlining, bold-type, etc...) obvious on any amended pleadings. All other changes will be shown in the text of the pleading.
6. Make whatever changes you want to the pleading. If it makes it easier, you can select *Final* from the *Review* tab so that you don't see markings of the changes, but only see the final version.
7. Before printing the *highlighted* copy, make sure that *Final: Show Markup* is selected from the *Review* tab. Print your document.
8. Then, print the final (without markup) by selecting *Final* from the *Review* tab.

All new material will be underlined, and all deleted material will have a line through it.

Now, if you forgot to do the whole *track changes* thing, and you just made a new document, you have two pleadings (let's call them "Original" and "Amended"). What to do?

1. Open up the Amended pleading.
2. In the *Review* tab, click *Compare* and select *Compare*.
3. The computer will prompt you for the location of the original document, and the location of the amended document. Input that information.
4. Click the *More* button to see the framework for tracking changes. The default is usually fine. Importantly, make sure that under "Show changes in" you click the *New Document* button.
5. Click *Ok*.
6. Click anywhere in the *Compared Document*, then print.
7. Also, be sure to save the compared document. Something like "Highlighted Amd. Complaint (07-24-11)".

## Customize Ribbon

The *Ribbon* is what replaced the traditional drop-down menus familiar to users of older Word. If you are new to Word 2010, the *Ribbon* can be confusing because you used to know where everything was, and now much of it has moved. Word allows you to customize the Ribbon to move *buttons* on existing tabs, or to even create new tabs with those buttons you use most often. Click *File*, *Options* and *Customize Ribbon* to access these features.

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## Formatting Styles

When creating a document, there are bound to be some things that you want formatted differently within the document. For example, when citing to a longer snippet of text in a motion, I typically indent it on both sides, full justify it, and single space it. With Word, you can save that formatting "style," meaning that the next time you want to apply that style, you will have to click one button instead of many.

To create a new style, select the block of text you want to later emulate. Click and hold Control-Shift-Alt-S (this is the keyboard shortcut for the Style dialog box; an easier way is to click the miniscule dialog box launcher button on the default Ribbon underneath the *Change Styles* button). The bottom left button is *New Style* — click it. Give your style a name, and make sure *Paragraph* is selected in the *Style Type* drop-down box. Click *OK*.

To access your new style, select the text you want to reformat. Click and hold Control-Shift-Alt-S (or click the same dialog box launcher button as before), and select your style. Your text will automatically convert to the style you selected.



## Creating Captions

This is my second biggest pet peeve—trying to modify a caption that was created with a lot of tabs and spaces of the space bar. If I need to change the name of a party, then the middle asterisk line gets all out of whack. The solution is to build a table.

Every caption needs a table with one row and three columns. Click the *Insert* tab, click *Table*, and make a 3X1 table. The first column contains the names of the parties. Type them in as you normally would. If you need to indent anything (for example, the word “Plaintiff” underneath the actual name of your plaintiff), press Control and Tab at the same time. Whatever you do, don’t use the space bar (it won’t line up properly).

The second column typically contains a line of asterisks, or parentheses, or some other symbol. The third column usually contains the case number. Now, when you make changes to one column, it will not affect any of the formatting from other columns. As a bonus, if you want to create lines or eliminate lines around any of these boxes in the table, you can do so: Highlight the boxes you want to modify, right click, click *Borders and Shading*, and in the *Borders* tab, choose your preferences.

## AutoText

If you are a lawyer, you find yourself creating the same or similar items within documents and documents over and

over again. Captions, proposed orders, certificates of service, affidavits and signature lines, for example. Word’s AutoText feature can streamline the process so you won’t have to hunt for the most recent version of whatever you are trying to recreate.

Find the text that you want to automate, whether in an existing document, or just create it from scratch. Select all of the text that you want (Control-A is an easy way to do this if you want to select the entire document). On the *Insert* tab, click *Quick Parts*. Under *AutoText*, click *Save Selection to AutoText Gallery*. Give it a name, and tell the computer what to do with it—insert wherever you command it to, insert it in a new paragraph, or (as for a proposed order), insert it in a new page. Then, when you need to access the feature, go to the *Insert* tab, click *AutoText*, and choose your new option.

## Recover Unsaved Documents

We’ve all done it—worked for hours on a document that was just flowing *so well*. The ideas kept coming, the diction was perfect, the syntax was extraordinary. And then, you hit the ‘x’ in the upper right hand corner. You shut the document down, and that icy cold feeling in the pit of your stomach starts to take over. *I forgot to save it.*

Word 2010 can save us from ourselves. Click *File, Recent, Recover, Unsaved Documents*, and choose the document you need to recover. Now, this will only recover the document from the time of the last autosave, which typically at ten-minute intervals. To change that (maybe make it every 3-5 minutes), go to *File, Options, Save* and click a time under *Save Autorecover Information Every \_\_\_ Minutes*.

## Conclusion

The best way to learn new or unused features of Word is to take a few minutes from time to time to experiment—click on buttons you’ve never clicked, and delve into the inner workings. Microsoft Office has a decent Facebook page where they periodically offer tips and suggestions, and there are numerous books devoted to the subject. The general rule is that if you think there should be a better way to do something, there usually is. You just have to look around to find the answer. ■

## Biography

**John J. Cord** (Plaxen & Adler, P.A.) graduated from the University of Colorado School of Law. He concentrates his practice on assisting victims of automobile negligence, medical malpractice, and defective products. He is licensed to practice in Maryland, the District of Columbia, Pennsylvania, Georgia and Minnesota. He is a member of the American Association for Justice and is former chair of the MAJ Technology and Education & Programs Committees. Follow him on Twitter at @johnjhcord.