

Agenda CPD 383: Mastering Microsoft Word – Part 1

First Hour

How to Customize Word for a Law Office and Fix Its Default Settings

In this class, you will learn how to:

1. **Improve The Interface:** Customize Word's interface for a legal user and get the tools you need one click away.
2. **Fix Default Formatting In New Documents:** Are you tired of Word forcing Calibri 11 pt or the new Aptos 12 pt with extra space between paragraphs on you? Learn how to permanently change Word's default formatting to something appropriate for legal documents.
3. **Fix Default Formatting In Existing Documents You Have To Edit:** The default formatting buried in documents you edit is often in disagreement with the formatting you want to see. This is what causes Word documents to randomly shift their formatting without the author doing anything to cause it (it's the default formatting coming to the surface). Learn how to identify and fix default formatting in any document you edit.
4. **Customize Word's Default Template:** We'll explain the role of Word's default template (Normal.dotm) and how to customize it.
5. **Fix Word's Programmatical Default Settings:** Stop being annoyed with Word and learn how to customize Word's programmatical default settings and make Word more friendly in a legal environment.

Problems solved:

- Make Word considerably less annoying
- Configure Word's interface so it works better for legal users
- Finally get rid of the Calibri and Aptos fonts from your new documents
- Fix all of Word's programmatical settings that irritate users
- Identify and solve the reason that the formatting of many documents seems to have a mind of its own

Second Hour

Track Changes, Compare Documents and Security Issues including Metadata Removal and Encryption

In this class, you will learn how to:

1. **Navigate Security Issues:**
 - A. **Ethics Rules:** Learn how to meet your obligations under Rule of Professional Conduct 1.6 (U.S.) or Code of Professional Conduct rule 3.3-1 (Canada).
 - B. **Remove Metadata:** We'll explain what metadata is, why you need to remove it from your Word files, and how to do so.
 - C. **Encrypt a Word File:** We'll show you how to ensure that only the intended recipient can open your Word files by using file encryption built into Word. We will also briefly discuss email encryption options you should consider.
 - D. **Why .DOC Files Should Be Avoided In Favor of .DOCX Files:** Word 2003 and prior created .DOC files. In Word 2007, Microsoft migrated to a .DOCX file type. There are many reasons for that. More importantly, your office should not be using .DOC files. We'll show you how to convert them.
 - E. **Compatibility Mode Should Be Avoided:** Why some Word files show up in compatibility mode, why compatibility mode should be avoided, and what to do about it.
2. **Tracking Changes:** How to use this feature to indicate your proposed changes to a document.
3. **Add Comments:** We cover how to add, resolve, hide and delete comments in your document. We will also show you how to disable "modern" comments that no one likes and revert back to the old comment style that everyone seemed to like better.
4. **Compare Documents:** You will learn how to run a comparison between any two versions of a document to identify the differences between them.
5. **When Word or PDF Files Should Be Used:** Word files are preferable in certain circumstances; and PDFs are preferable in certain circumstances. We'll explain the pros and cons of each.
6. **Add Watermarks:** How to insert, manipulate and remove watermarks from our documents.

Problems Solved:

- Make sure you aren't unwittingly sending damaging information to opposing counsel

in your Word documents

- Stop worrying about metadata
- How to convert .doc files to .docx the right way
- Negotiate documents electronically in a manner that you'll easily be able to identify how another party (like opposing counsel) has edited your document
- Skillfully use Track Changes, Compare Documents, and add comments to your documents
- Feel confident you're using the right file type (Word or PDF)