Microsoft Word: Settings for Legal Professionals
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Topics

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Word Settings for Legal Professionals

**CUSTOMIZING THE QUICK ACCESS TOOLBAR**

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.

![Image of Customize Quick Access Toolbar dialog box]

• 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**

![Image of Right-Click menu with Add to Quick Access Toolbar option]
**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 2010 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.
CUSTOMIZE THE STYLES PANE TO BE MORE USEFUL

1. Click the Flyout button in the Styles group to show the Styles Task Pane

2. Put a check in the “Style Preview”

3. Click on Options to show Style Pane options dialog box and change settings to match those shown below...
**CONFIGURE ADVANCED SETTINGS**

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

**Under “General” options…**

Under "General" options in Word Options:

- Set (or remove your user name here)
- Uncheck this box

**Under “Display” options**

Check "Update fields before printing".

Check this box to make sure that all tables of contents and cross-references are updated prior to printing the document. NOTE: This will automatically update a DATE (ex July 24, 2012) field if the date is not hard coded in. To turn a date FIELD into a hard coded date that will not change highlight the date and press CTRL+Shift+F9

- File > Options > Display > Printing Options > Check the box next to “Update Fields Before Printing”

**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.
Always showing shading for field codes will help you see fields like page numbers and other field codes easily.

**Show Document Content** section> Chose ALWAYS as the setting for “Field Shading”.

**Good tip for legal assistants – turn on the Style Pane while in DRAFT mode (remember you only see it when in DRAFT mode).**

File > Word Options > Advanced > **Display** section > set “Style area pane in Draft and Outline views” to a value of 1

### 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...”