

# Microsoft Office Word: Diving Deep

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## Introduction

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Not really. Microsoft Word 2016<sup>1</sup> (“Word”) has immense capabilities out of the box for attorneys and legal professionals. Most of the tools are available from the ribbon or from menus that come from the ribbon. Out of all of the tools and features in Word that are discussed in this article, there is only one that is truly “hidden”. As detailed below, this article discusses styles, the major Word feature that attorneys should be using to make document creation and editing with Word more efficient and less frustrating. Let’s get started!

## First Things First – Don’t be Afraid to See the Whole Picture

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### Show/Hide Trigger

Turn this on while drafting! The Show/Hide Trigger is the button in the Home Tab of the Ribbon that looks like the traditional paragraph mark (¶). This trigger allows you to see the non-printable characters in a document. These non-printable characters include all manner of items, including spaces, tabs, paragraphs, non-breaking spaces, page breaks, section breaks, etc., etc. Having this triggered is key to really understanding how your document is actually working.

## Styles

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Styles are probably the most important tool in Word. Simply put, a Style is a pre-set format for any part of your document. Styles are so important, they the quick access bar to Styles take up about half of your default Home Tab in the Ribbon. Most Word users forgo understanding Styles, because to really use them, a user would have to open the Styles menu, which is not necessarily intuitive. This does not mean that the Styles quick access bar is not useful – it definitely is – however, to really utilize Styles, the quick access bar is not enough. In Word, to easily access the Styles Pane, click on the small box with an arrow in the bottom right hand corner of the quick access bar.

The Quick Access Toolbar only provides a limited view of the styles available in any specific document. Some styles are hidden by default, while the Normal, Headings, and some other styles are readily visible. The Styles Pane provides a look into some or all of the Styles in a document. To see every possible Style, selection “Options”, and choose “All Styles” under the drop down for “Select styles to show”. For most users, the first time they do this exercise, they realize something that helps frame the importance of Styles in Word: there is a Style

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<sup>1</sup> This article will detail and discuss functionality in Microsoft Word 2019 installed on Windows running in Parallels on a Macbook Pro.

of every part of a document, including the Table of Contents, Hyperlinks, Page Numbers, Lists, etc.

## Types of Styles

For the purposes of this presentation, there are two general classifications of styles that attorneys and legal professionals should be aware of to really start using Word more efficiently. While these two classifications are not the actual types of styles defined by Microsoft, using these two classifications as a substitute will provide most people with the functionality they need for drafting legal documents. These two style classifications are Paragraph styles and Heading styles.<sup>2</sup> Paragraph styles are the preset formats that will make up most of the body text in a document: regular paragraphs, block quotes, signature blocks, etc. Heading styles are just that; they apply preset formatting to the headings in a document. However, when using heading styles, a whole world of efficiency opens up as discussed below.

## Creating & Modifying Styles

Word comes with default styles out of the box that comes with the now normalized Calibri 11-point font. As most know, legal documents are not drafted or filed using these defaults. Most users will then want to simply modify the style. Modifying a style can be accomplished in multiple ways, however only two are highlighted here.

The first and easiest way is to manually change the font, spacing, etc., that you want and then right click the corresponding style in the Style Quick Access Bar and select “Update [Style Name] to Match Selection”. This will then update the Style you selected to match the formatting settings you choose. For the most part, this method works, however, sometimes a little more control is needed.

The second method is to right click a Style that needs updating, either in the Quick Access Bar or the Styles Pane and choose “Modify ...”. This will open the Style modification menu, which provides specific controls over Font, Paragraph, Tabs, Numbering, etc., for the Style selected. Utilizing this method will ensure that the Style selected will be modified with precision.

Once users begin to start using Styles and start understanding the power of Styles, they will start creating their own Styles instead of relying on the default Styles already provided in Word. To create a style, open the Styles Pane and click the button that looks like a star above the two As. This will open a similar menu as to the modification menu and the process

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<sup>2</sup> There is a third for more advanced users, using the Character classification, but that is beyond the purposes of this paper.

is similar to modifying a style. The only two additional tasks are to name the newly created style and then identify the type of style it is. As you will see, Heading is not available, however, Paragraph is. If you desire to create an additional “heading” style, choose the “linked” style format.

### *Important Options in Modifying or Creating Styles*

The options in modifying or creating styles are too numerous for this paper, however, there are a few main options that will enhance the process of using styles in legal drafting.

#### *Style for following Paragraph*

One feature is the option in the style menu called “Style for following Paragraph”. Through this drop down, you can select which style would be applied for the next paragraph when you hit the “Enter” key. For example, if you know that most of the time you follow your first level of heading (aka “Heading 1”) with a paragraph, then selecting the Normal style as the “Style for following Paragraph” in the Heading 1 style menu will automatically switch your formatting from Heading 1 to Normal. You can go from one style to another without having to use your mouse to click on another style. This option, although somewhat basic, really helps writers stay focused on writing instead of having to choose formatting options.

#### *Font Format*

In the bottom left hand corner of the style menu is the Format drop down. Do not be fooled! This is the most powerful drop-down menu in the entire style menu. Through this menu, you can select multiple categories of formatting to control your style, including even animated text (although that would never be used in a legal document). Of these, the font menu is one of the more important. Selecting this option will open the entire font menu for the style, not just the shortcuts provided for either in the Ribbon or the main style menu. There are numerous options in this Font menu that apply to legal documents, including the dreaded Small Caps setting that is so hard to find, but needed for most Bluebook citation methods. An Advanced Tab is also included in this menu, which provides specific controls over the formatting of your font, including spacing, Kerning, and other special features that may or may not be needed. Once all of the wanted settings are selected, clicking “OK” will apply those font settings to your selected style.

#### *Paragraph Format*

In addition to the Font menu, the Paragraph menu is also a key menu in modifying or creating styles. This menu provides the spacing and indentation options that legal documents need, as well as some additional options in the line and page break tab that are helpful in dealing with headings and page breaks. This is also the menu to change Word’s default Normal style’s spacing issues, which default to 1.08 spaces between sentences and the extra 8-point space between paragraphs, which do not work in legal documents. As with the Font selections, click “OK” will apply any updated paragraph settings to your selected style.

## Heading Styles

Heading styles are considered linked styles that have been tagged to various outline levels in Word. In layman words, this means that heading styles can do a lot! Modifying the default heading styles in Word is similar to modifying paragraph styles. However, there are some options in the Line and Page Breaks Tab in the Paragraph Menu that most paragraph styles would not opt for that are primed for heading styles. These include the “Keep with next”, “Keep lines together”, and “Page break before” selections. “Keep with next” is a feature that keeps the current text tied to the following paragraph so that they do not appear on separate pages. This feature is helpful for headings to make sure headings do not appear on one page and the content starts on the next page, automatically! “Keep lines together” ensures that all of the current text stays together and does not break across pages. Similar to the former setting, this ensures that a multi-level heading stays all on the same page, automatically. Lastly, “Page break before” inserts a page break, automatically, before the text. This is helpful for those top-level heading styles that are applied to various sections of a document.

The other Font and Paragraph options for Heading styles are the same as for Paragraph styles. However, for those that want to include numbered headings, forego the Numbering option in the Style Menu (under Format drop down) and instead use a Multilevel List.

## Multilevel Lists

Multilevel List are the long ignored third option in the bullets and numbering shortcuts. This is unfortunate, as using a Multilevel List is much more powerful and feature rich for tiered headings. Additionally, Multilevel Lists can be linked to styles. This means that adding content in the middle of a document and ensuring the numbering automatically adjusts is only a click away, instead of guessing or manually entering a number. Here is how it works.

The Multilevel List menu is contained in the Home Ribbon to the right of the bullets and numbering options. Selecting this dropdown list will provide a few default and prebuilt list styles, however, when customizing styles, why not also customize the multilevel list that is going to be linked to the style? Select “Define New Multilevel List” and a partial menu opens. Select the “More” arrow in the bottom left hand corner of the menu. This opens the full multilevel list menu.

Selecting each level in the left-hand pane will provide formatting options for each level in the list. Fonts, numbering, spacing, indentations, and numbering restart options are available for each level. To really start utilizing this, link each level in the multilevel list to the level of Heading in the document. This triggers each heading to adopt the numbering that is formatted in the corresponding level and allows for easy selection of headings and their corresponding numbering within the document through selecting the heading, instead of manually numbering the headings or hope that autocorrect gets it right.

## Style Separator

In general, paragraph and heading styles are mutually exclusive in the same “paragraph” in Word. However, there is a little known tool that can actually separate these styles to create in-line headings, which are seen in a variety of contracts. The “Style Separator” is hidden by default, but can be accessed through either (1) using the shortcut CTRL + ALT + ENTER, (2) searching for it in the search bar at the top of the Ribbons, (3) by adding it to your Quick Access Toolbar or (4) adding it your custom Ribbon options through the Word Backstage View → Options → Customize Ribbon menu.

To use the Style Separator in an existing document, follow these steps:

- (1) If it is not already on, trigger the Show/Hide to be on.
- (2) Clear any styles you have on a target paragraph.
- (3) press ENTER after the heading that you want to apply your Heading Style to.
- (4) Apply your Heading Style to your heading.
- (5) Apply whatever Paragraph Style you prefer to the text that is to come after the heading.
- (6) Place your cursor after the heading and insert your Style Separator. The paragraph text should then automatically “jump” up to your Heading.

You are now on your way to using stylized in-line Heading Styles!

## Benefits of Using Heading Styles

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Now that heading styles are set and linked in a Multilevel List, there are side benefits that allow for easier navigation and editing of a document.

### Navigation Pane

First is the Navigation Pane. Selecting the View Tab in the Ribbon provides the option to turn on the Navigation Pane. This is the same Pane that opens automatically when searching within a document, however, instead of defaulting to the “Results” tab of the Pane, the Pane automatically opens to the “Headings” tab. All of the headings that are using heading styles in the document should now be visible. Navigating to various sections of a document is as easy as clicking on the heading in the Navigation Pane, instead of the old scroll or page down/up method.

### Outline View

Second is Outline view. Again, in the View Tab, there is an option called “Outline”. Instead of viewing the document in the normal “Print Layout”, this changes the view of the document into an expandable/collapsible outline view. The options in the Outlining Tab of the Ribbon help for setting the various views of the outline. Additionally, each section of text has either a plus sign or a gray circle. Clicking and dragging these icons will move the entire section or selection of text, with all subparts until the same next level of heading or text block. This allows for easily moving parts or whole sections of a document instead of copy/cut and paste. Additionally, all of the numbering is automatically recalculated! So, if there is an entire section of a contract or a legal brief that needs to be moved up or down in

the document, a simple click and drag will accomplish this, instead of highlighting, cutting, pasting, and praying that everything worked.

## Tables of Contents

Third is the ability to automatically generate a Table of Contents. When Heading styles are in use, inserting a professional and accurate table of contents is just a few clicks away. First, navigate to the area in the document that the table is to be inserted. Then go to the Reference Tab and select the “Table of Contents” drop down. As with the Multilevel lists, there are default tables that Word provides, however, selecting “Custom Table of Contents” will open the full Table of Contents menu. In this menu, there are a variety of settings, including using Passim and the ability to select how many levels of headings are included in the table of contents. To gain greater control over exactly which headings will appear in the table of contents, select “Options” and then enter the corresponding levels for each heading; by default, each heading level that is indicated to be inserted in the table is already checked. Click “OK” and the automatically generated table of contents appears, complete with the headings and corresponding page numbers.

In the event that the formatting looks weird in the table, each level of in the table of contents has its own unique style. As with all other styles, modifying is simple. Open the Styles Pane, and select the desired style for each level: TOC 1 for level 1, TOC 2 for level 2, etc. Changing the fonts, spacing, etc., is just like modifying other styles. The benefit of this is to change the look of a table of contents without having to change the look of the actual document.

Additionally, if any changes are made to the document in a later time, updating the table of contents is a matter of a few clicks of the mouse. If only content is added that would adjust the page numbers in the document, right click the table of contents and select “Update Field” and select “Update page numbers only”. In the event there are substantive changes to the headings in the document, go through the same process, however, choose “Update entire table” when prompted.

## PDF Bookmarks Conversion

Last is the ability to bookmark the headings in a document natively in a PDF. Some courts require that all electronic filings have a readable PDF that has each heading bookmarked, so that judges can easily navigate through the PDF during hearings or on review. Without using headings linked to heading styles, this was a tedious and manual process in Adobe Acrobat Pro or another PDF software. Instead, using heading styles, this is simplified by saving the document as a PDF, selecting the “Options” button, and checking the option that states “Create bookmarks using – Headings”. Select “Okay”, save the PDF, and voila! A PDF formatted document is created with bookmarks already included!

## Cross-References

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Cross-references make it easy to automatically provide references in the text of your document to other parts or sections of a document. When dealing with numbered sections

and paragraph, instead of manually typing in “as provided for in Paragraph 12(b)”, insert a cross-reference in the document. Doing so adds a field to the document linking the text of the field to the referenced area of the document.

This way, when (not if) the paragraph that was originally Paragraph 12(b) moves and becomes Paragraph 11(b) because a new paragraph to the contract is inserted or a paragraph is moved in the document, the numbering can be automatically updated. Doing this to each cross-reference, instead of manually going through a document later in time and updating each and every number when there is a change can save a host of time and prevent major errors.

## Conclusion

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Microsoft Word comes with a host of features that makes formatting long or complex documents a breeze. While utilizing styles is probably the most important formatting feature to understand, there are many, many more! Start exploring with this base information and start using this one tool (Word) as efficiently as possible. Good luck!

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