Affinity CONSULTING

# WORD FOR MAC
## for LEGAL PROFESSIONALS

Covering Word for Mac
Version 2016

# MICROSOFT WORD FOR MAC

## FOR LEGAL PROFESSIONALS

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# MEET OUR TEAM OF WORD EXPERTS

Meet our team of Word experts who have co-authored this manual.

## JEFFREY SCHOENBERGER

Jeff is our resident Apple guru. After practicing law as an Equal Justice Works / AmeriCorps Legal Fellow for the Legal Aid Society of Southwest Ohio, Jeff joined Affinity, and brought his unique ability to discover faster and better ways for clients to do everyday tasks to our team. Because Jeff understands the worlds of both PC and Mac users, clients using any type of system can count on him to help with desktop office software and document assembly needs regardless, of the type of computer an office has. Jeff is also well versed in Apple's iOS, so he can aid clients in making the most of their tablets and mobile devices.

## BARRON HENLEY

Barron is an attorney who has over 20 years of experience in legal technology. After earning his B.S./B.A. (marketing and economics) and J.D. from The Ohio State University, Barron discovered his passion for helping lawyers fix problems within their practice. Today, Barron partners with our clients to make law firms and legal departments more efficient. Barron's breadth of knowledge enables him to dive into the details of a firm's operations. He is often the lead on Comprehensive Practice Analysis projects for clients that examine all aspects of making a firm more successful: technology, organizational design, process optimization and financial practices.

## JOHN FEDERICO

John's specialty is "making technology do cool things it wasn't necessarily intended to do." Having practiced as an attorney, John understands the rigors of practicing law, but he also empathizes with the demands placed on a legal professional's time. With this in mind, he saves time for his clients by leveraging document automation technologies like HotDocs and Microsoft Word, to drastically accelerate the drafting, reviewing, and editing of legal documents.

## DANIELLE DAVISROE

After working as an attorney in domestic relations for several years, Danielle found her way to Affinity and to this day she is always on the lookout for better ways to do things. She carries new strategies she finds with her as she works with the clients her team supports. Danielle has a Bachelor of Science in Business Administration from The Ohio State University Fisher College of Business and a Juris Doctorate from The Ohio State University Moritz College of Law.

## ADAM RINGEL

With four years' experience as a personal injury attorney, Adam is a valuable member of our document automation team. In addition to his skill in helping make legal drafting more efficient through technologies like HotDocs and Microsoft Word, Adam provides training on the Microsoft Office Suite and builds custom data queries for our clients. With the highly collaborative nature of the document automation team based in Columbus, Adam is constantly invigorated by his colleagues. The group consistently helps one another find new insights and perspectives along the path of finding the solutions our clients need.

## CYARA HOTOPP

After graduating cum laude with a Bachelor of Arts in Philosophy from The Ohio State University and a Juris Doctorate from The Ohio State University Moritz College of Law, Cyara knew she wanted to use her education to solve problems for legal professionals. She is also currently working on getting an MS in Information Assurance. Cyara works with law firms and legal departments to help streamline the drafting of complex documents. Her technological understanding coupled with her background in law means she doesn't just make a document work properly, but she also advises on truly improving the document from a best practices perspective.

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# 16 PARAGRAPH FORMATTING - PARAGRAPH NUMBERING AND BULLET POINTS

## BULLETS AND NUMBERING - A WARNING

To completely control numbered or bulleted paragraphs, you need to *link* your numbering scheme to "styles" in Word. A style is a set of formatting characteristics that you can apply to text, tables, and lists in your document to quickly change their appearance. When you apply a style, you apply a whole group of formats at once. Linking numbers and styles allows you to simultaneously control the formatting of the number/letter and the formatting of the paragraph that follows the number. If you use bullets or numbering in isolation (without linking them to styles), the only thing you can control with the numbering scheme is the format of the number itself. To read more about styles, see 19 - Styles - The Basics on page 108 and 20 - on page 123 below.

Having said all of that, we appreciate the fact that most Word users just want paragraph numbering and don't understand how to control Styles. This chapter is designed to help you get paragraph numbering and/or bullets to work the way you want even though you may not fully understand how to control styles.

## BULLET POINTS

### What Is a Bullet Point?

Bullets are symbols that appear to the left of text and are usually used to highlight the text that follows it or simply to help separate items in a list. Bullets can be applied as you type or afterwards. An example of bullets is shown below:

13. **Conflicts of Interest**. Employee shall conduct business in an ethical manner by:

- Avoiding any conflicts of interest; and
- Refusing to accept, and reporting to the Company the offering of, anything of value, including a gift, loan on preferential terms, reward, promise of future employment, favor or service intended to, or which possibly could, influence a person to discharge his duties for the Company, or which is based on any understanding that his actions would be influenced.

### Apply Bullets Using Toolbar Button

1. Click the **Home ribbon** ➔ **Paragraph group** ➔ **Bullets button** . If you're not happy with the default bullet that appears, click the **Bullet button dropdown arrow** to choose another style (select from the **Bullet Library**), or create your own (select **Define New Bullet…**).

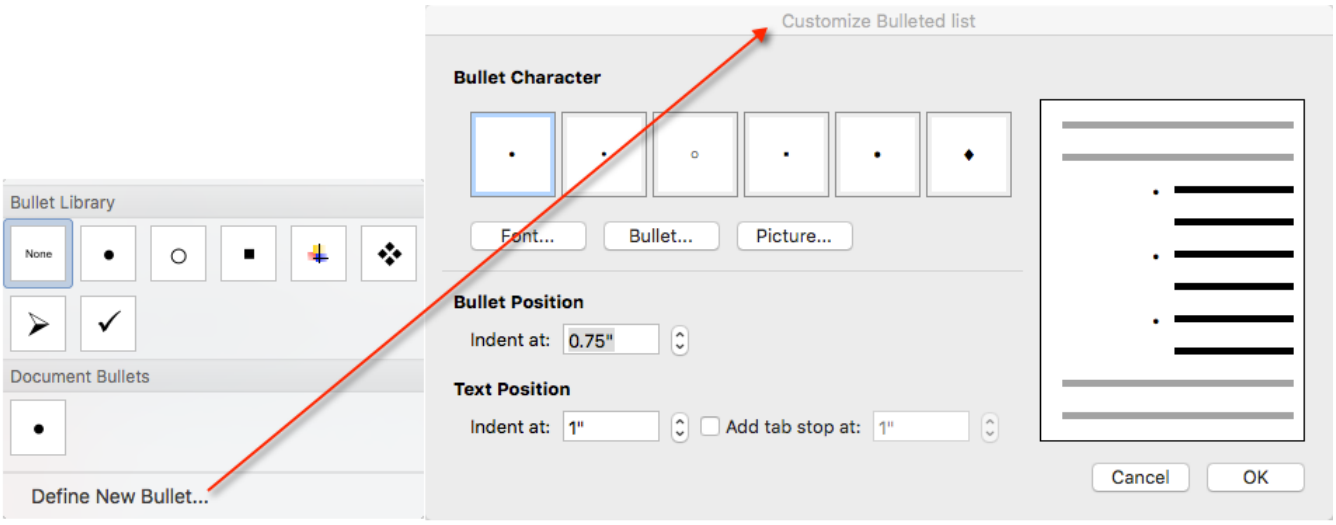



FIGURE 16.1

2. In the **Define New Bullet dialog** select the characteristics that you would like applied to new bullet style, click **OK** and the bullet will be inserted into your document.
3. Click **OK** and the bullet will be inserted into your document.
4. Type some text after your bullet and hit **Enter**.
5. The bullet style carries down the page with each hard return.
6. If you want extra lines between each bulleted paragraph, use paragraph spacing (see Automatic Spacing Between Paragraphs on page 70 above.

## Turn Off Bullets

When you insert a bullet, each time you hit **Enter** another bullet will automatically be inserted at the beginning of the next line. You can turn off bullets several different ways:

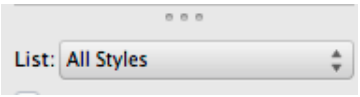
- Click the button again; or
- Hit **Enter** twice at the end of a bulleted list; or
- Hit the **Backspace** key; or
- Hit **Cmd + Shift + N** (which applies the default style called normal).

## Bullet List Styles

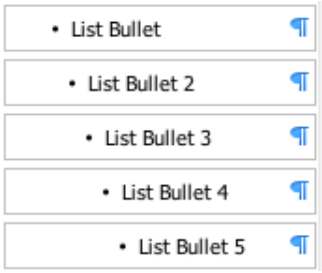
As will be discussed in greater detail in 19 (page 108), styles are groups of formatting attributes that can be saved, named and then re-applied at any time thereafter. Word 2016 includes four pre-defined Bullet List Styles which can be easily applied and/or modified.

In order to see the pre-defined bullet styles and apply them:

1. Click the **Styles Pane** button ( Styles Pane ). Where it says **List**, select styles to show as **All Styles**.




2. Scroll down and you'll see the following styles to choose from:




3. Click on the List Bullet style you want and it will be inserted into your document.

# SINGLE-LEVEL PARAGRAPH NUMBERING

## Draw Back of Single Level Paragraph Numbering

The problem with this particular feature is that it is only capable of one level of numbering. If you use this and later realize that you need a few sub-level paragraphs like the example below, single-level paragraph numbering can't help you and you'll have to start over with a Multilevel paragraph list.

> 7. The Master Commissioner of the Todd Circuit Court is ordered to sell the real property upon the terms and conditions provided in this Judgment, and the Master Commissioner will, from the proceeds this sale on the interest upon the sale bond, if any, pay the following items in the priority indicated:
>
> a. First to be paid shall be the cost of the sale and cost of this action;
>
> b Second to be paid shall be any real property taxes due and owing to the City of Allensville, the County of Todd or the Commonwealth of Kentucky for the years 2005 and all years prior thereto;
>
> c. Third to be paid shall be the judgment amount due and owing to the Plaintiff, First Bank of Todd, in the amounts adjudicated hereinabove, together with any additional amounts equal to advances made, if any, by the Plaintiff for the purpose of the protection of the property, payment of taxes, or hazard insurance premiums, such additional amounts to be evidenced by affidavits of the Plaintiff presented to and approved by the Court prior to payment, as well as the Plaintiff's court costs herein expended; and
>
> d. Any amounts then remaining shall be held by the Master Commissioner of the Todd Circuit Court, pending further order of this Court as to the distribution of said proceeds.

In view of the foregoing, we generally recommend that you use multi-level paragraph numbering as described in the section entitled Multi-Level Paragraph Numbering on page 86 below. If you set up a multi-level paragraph numbering scheme but only use the top level 99.99% of the time, there is no penalty for doing so. The big benefit of this is that if you ever need a sub-level, it's already there and ready to use.

## Apply Numbering Using Toolbar Button

1. Click the **Home ribbon ➔ Paragraph group ➔ Numbering button** . If you're not happy with the default number or letter scheme that appears, click the **Numbering button dropdown arrow** and choose a different style (select from the Numbering Library) or create a new format (**Define New Number Format…**).

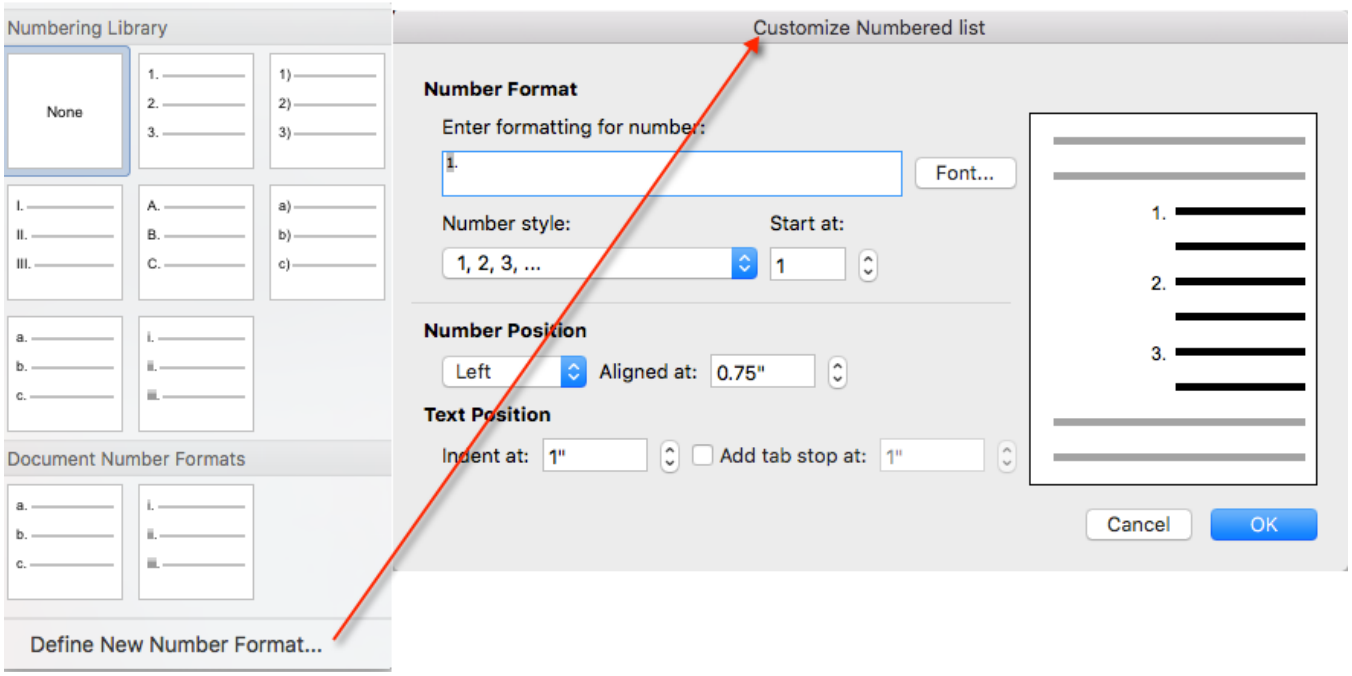



FIGURE 16.2

2. Type some text after your number and hit **Enter**.
3. The number style carries down the page with each hard return.
4. If you want extra lines between each bulleted paragraph, use paragraph spacing (see Automatic Spacing Between Paragraphs on page 70 above: **Font → Paragraph → Indents and Spacing tab → Spacing Before/After →** Uncheck the **Don't add space between paragraphs of the same style box**).

### Restart Numbering

If you have a numbered list earlier in your document and now you want to insert another numbered list, clicking the button will continue your numbering from the previous list. If you would like the new list to start numbering over again, you can right-click on the first line of the new list and choose **Restart Numbering**

## ADJUST INDENTS FOR BULLETS AND SINGLE-LEVEL NUMBERED LISTS

You will notice that when you add bullets or numbering, Word automatically sets your indents and you may not like what you get. If you change the indents using the Paragraph dialog, Word will reset them whenever you re-start numbering or change anything else about the list. In order to get them to stick, you need to:

1. Place your cursor in the paragraph
2. In the main menu bar, select **Format → Bullets and Numbering** and choose a bullet type. (If you don't see the bullet you need, click on a bullet type you won't be using.)
3. Click on **Customize**
4. Change the indents based on the illustration to the right
5. Change the bullet, type if needed (to do this, choose one from the predefined list shown or use the three buttons Font, Bullet, Picture)

6. Click on **OK**

The settings in the Adjust List Indents dialog above mean:

- **Number Position**: This how far from the left margin you would like the automatic paragraph number to appear
- **Text Indent**: This is how far from the left margin you would like the text of the paragraph following the number to appear.

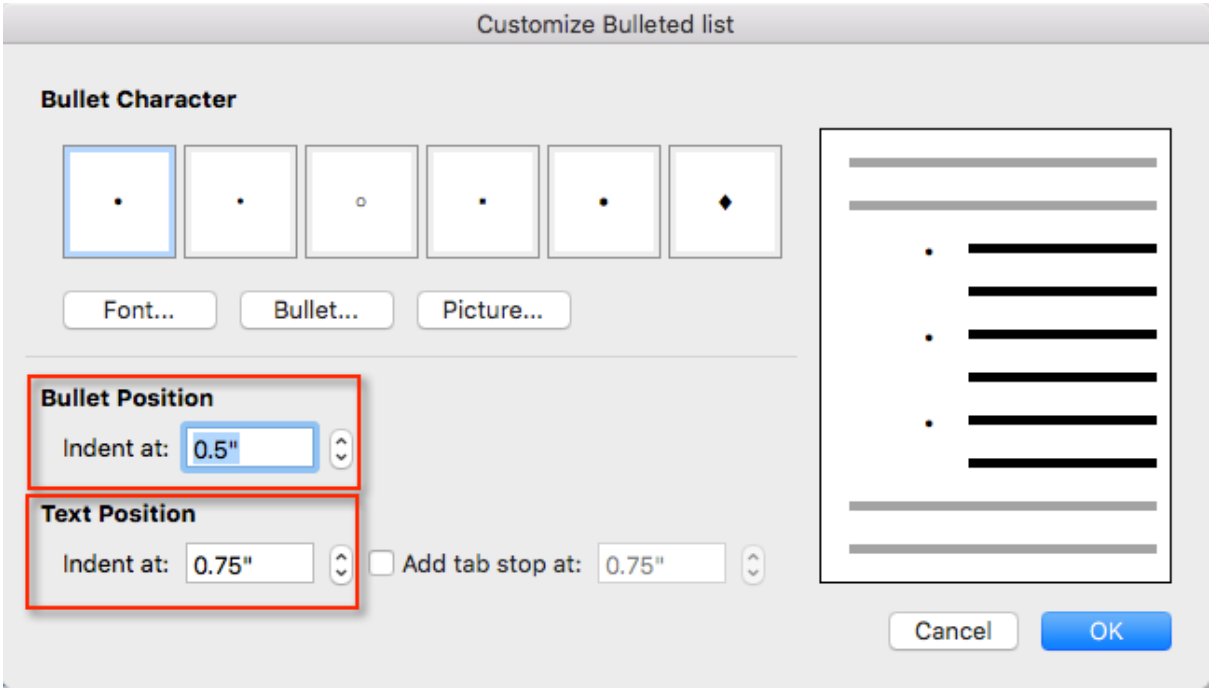



FIGURE 16.3

# MULTI-LEVEL PARAGRAPH NUMBERING

## How Multilevel Paragraph Numbering Works

Word allows you to set up automatic paragraph numbering schemes up to 9 levels deep. For example, below is a 4 level deep outline:

IX. **TERMINATION**.

A. **Termination Without Cause**. This agreement may be terminated by either party without cause upon ninety (90) days written notice to the other party, it being understood and agreed that such term and notice are reasonable in relation to the scope of this agreement and the undertakings herein provided for.

B. **Termination With Cause**.

1. **Default**. If either party shall default in the performance of any obligation or payment of any indebtedness under this agreement, it shall have 30 days after delivery to it of written notice of such default within which to cure such default. If such defaulting party fails to cure its default within such period of time, then the other party shall have the right to terminate this agreement without further notice.
2. **Other**. This agreement may be terminated by either party at its option and without prejudice to any other remedy to which it may be entitled at law or in equity, or elsewhere under this agreement, by giving ten (10) days written notice of termination to the other party if the latter should.
   i. Be adjudicated a voluntary or involuntarily bankrupt under any chapter of the Bankruptcy Act, as now or hereafter amended;
   ii. Institute or suffer to be instituted any proceeding for a dissolution, reorganization or rearrangement of its affairs;
   iii. Make an assignment for the benefit of creditors;

iv. Become insolvent or have a receiver of its assets or property appointed; or
v. Allow any money judgment against him to remain unsatisfied for a period of thirty (30) days or longer.

## Why You Should Use Multilevel Numbering In Every Circumstance

As described previously, the **Bullets button** and the **Numbering button** only allow ONE level of bullets or paragraph numbers. Therefore, if you start with either one and later determine that you need a sub-level, you simply can't get there from here (and you're going to have to start over with a multilevel numbering scheme).

Because of this, we strongly recommend that you use the **Multilevel List button** exclusively for numbering or bullets of any kind. Multilevel lists can also handle any kind of bullet point and since there are 9 available levels, it's never a problem to add another level (unless you need 10 or more levels).

## Set Up a Multilevel Paragraph Numbering Scheme

If you already have paragraphs typed and want to apply paragraph numbering after-the-fact, you can do so by selecting the paragraphs and following the steps below. Otherwise, set up the scheme before you start typing.

1. Click the **down arrow** adjacent to the Multilevel List button (**Home** ribbon, **Paragraph** group).
2. Choose **Define New Multilevel List** (*not* **Define New List Style**) at the bottom of the drop down menu.

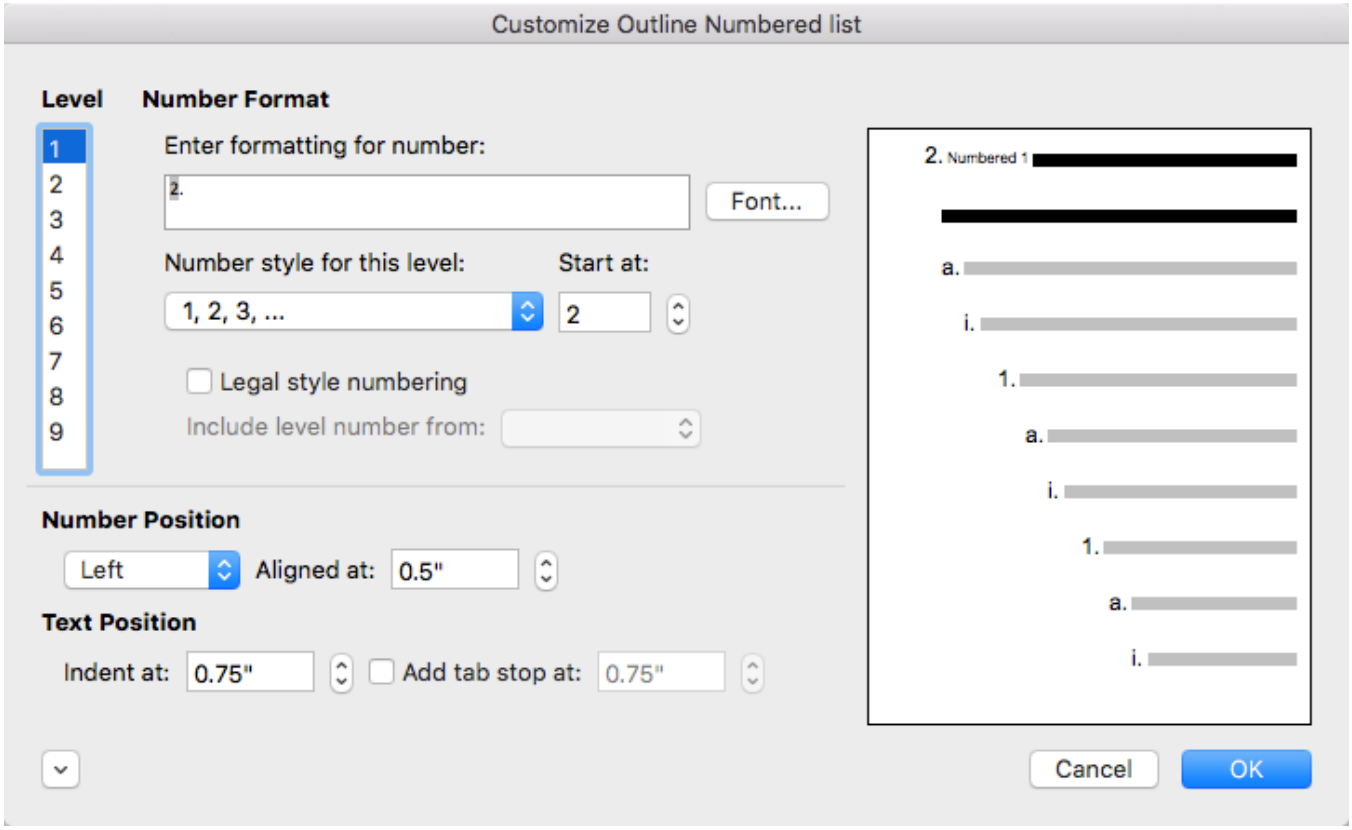



FIGURE 16.4

3. You will now see the dialog shown above. Here are a couple of things to keep in mind:
    - You can make adjustments to any of the 9 levels by simply clicking on the level you want to modify on the top, left side of the dialog.

- You NEVER type a number in the **Number Format** box. Instead, you use the *code* for the paragraph number which will be inserted when you choose something from the drop down below **Number style for this level**.
- **Font button** should only be clicked if you want the formatting for the paragraph number to be different from the paragraph that follows it. Therefore, you should not click the Font button in most cases.
- **Number alignment** must always be set to **Left**, even if you're centering an article number.
- **Aligned at** means how far away from the left margin you want your number to appear.
- **Text indent at** means how far from the left margin you want the text following the number to appear.

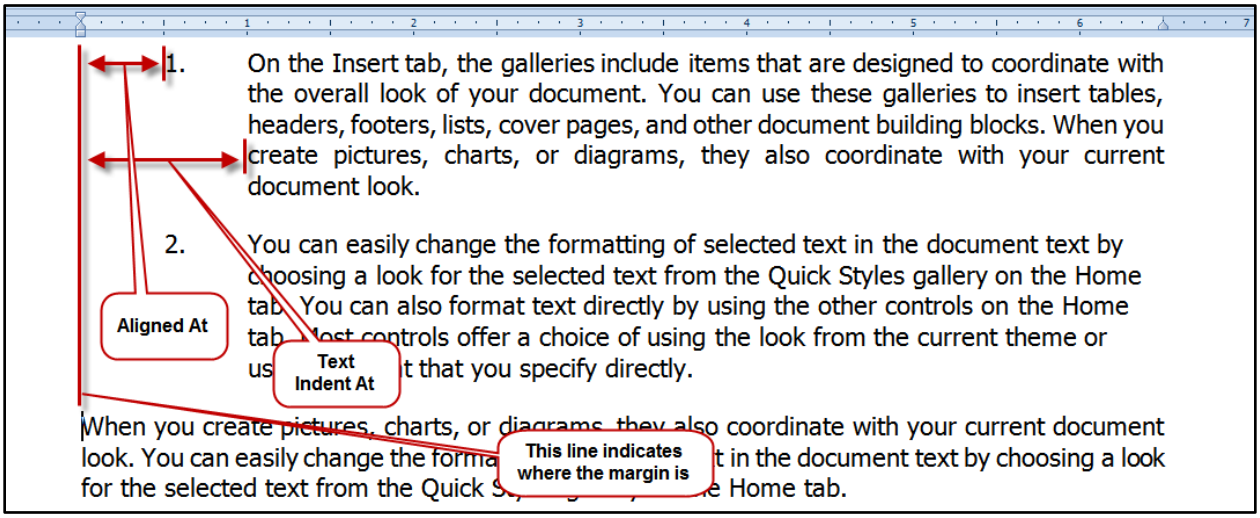



FIGURE 16.5

4. Below is configuration for a 3 level deep outline. Since I'm not going to use levels 4 - 9, there's no need to format them at this point.

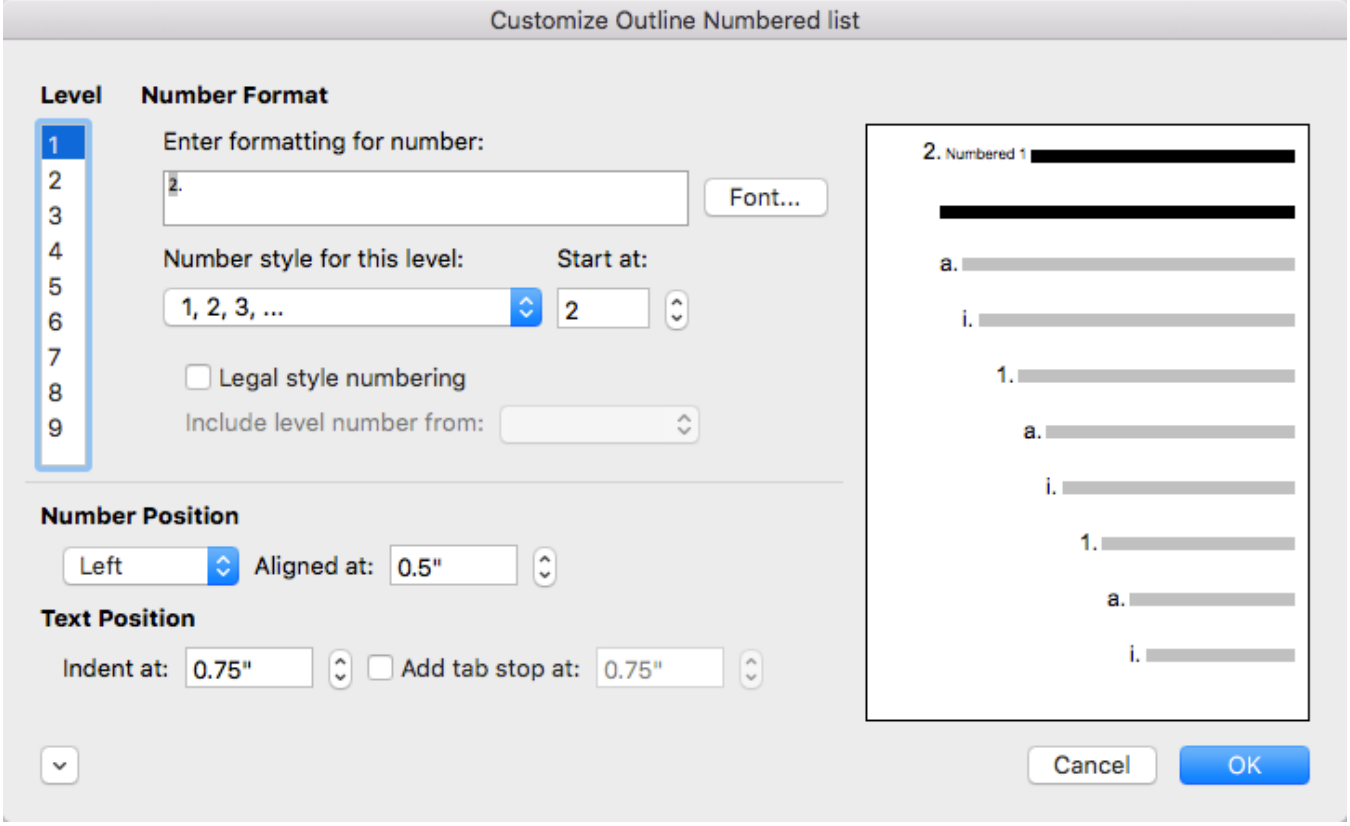



FIGURE 16.6

5. After you've set up the levels the way you want, click **OK** and you'll see a paragraph number appear in your document. Just begin typing. When you hit Enter for the next paragraph, you'll get the next subsequent number automatically.
6. If you want to change the level of the next paragraph to a sublevel (level 2 rather than level 1), you can use any of the following methods:

    - You can promote or demote a paragraph by clicking the buttons
    - If your cursor is at the beginning of a paragraph you can demote it by hitting the Tab key on your keyboard. Promote by hitting Shift+Tab.
    - If you right-click the paragraph, you can promote it by choosing Increase Indent or demote it by choosing Decrease Indent.

## Add Spacing Between Numbered Paragraphs

If you want to add spacing between the numbered paragraphs, select all of the paragraphs you've typed, right-click and choose **Paragraph**. Add a **12 pt After** and uncheck **Don't' add space between paragraphs of the same style**. Then click **OK**.

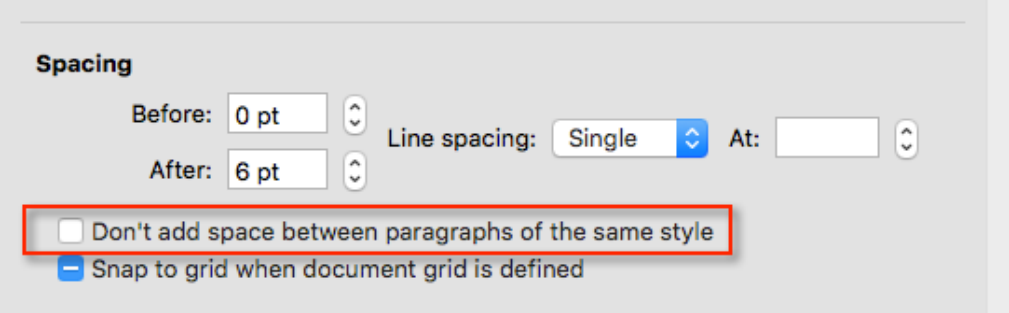



FIGURE 16.7

## Make All Paragraphs Double Spaced

The explanation for adding spacing between numbered paragraphs above assumes you have single spaced paragraphs and would like extra space between each one. If you just want every paragraph double-spaced, don't add space between them or you'll end up with too much space between each paragraph when you apply the double space formatting. Instead, select all of the paragraphs you've typed, and click **Format ➔ Paragraph** (SK: **Opt+Cmd+M**) ➔ set **Line Spacing** to **double** (SK: **Ctrl** + **2**). Of course, you can also apply double spacing by using the **Home ribbon ➔ Paragraph group ➔ Line and Paragraph spacing button** .

## Restart Numbering at 1

Right click the paragraph you want to start over again at 1 and choose **Restart at 1**.

## Make Changes To Your Numbering Scheme

If you decide you want to change something about the numbering scheme you've created, right-click any paragraph and choose **Adjust List Indents**. You'll be presented with the Multilevel list dialog again and you can make changes. Note that you *do not* have to be in the first paragraph to do this. For example, let's say I have 3 pages of numbered paragraphs when I decide that I want to change the top level of the outline from Arabic (1.) to Roman Numerals (I.). Click any paragraph in the numbered list, choose **Format ➔ Bullets and Numbering**, select your list, and click **Customize**. As you'll see the entire list will change (above and below the paragraph that you right-clicked in the first place.

## Turn Numbering Off

There are two ways to do this:

- Hit the Backspace key twice; or
- Click the Multilevel List button once

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