

Be More Productive using Word in Just Five Days

While Saving Your Sanity in the Process

Ok, right now you might find yourself with some extra time on your hands. Not ideal, but it is an opportunity to learn a few tricks to make yourself more productive in Microsoft Word. So, when this is over you will be ready to hit the ground running. Leaving those who wasted this time in the dust.

Productivity isn't just doing work; it is doing it in the most efficient manner. What I am going to show you, are tips and tricks in Word that you can use to not only do your work but do it more efficiently, resulting in more time for clients! Now, these are not the only ways to be more productive, but the ones I felt would take the least time to show you and gave you the biggest bang for your buck. I am going to break this information down into five days and each lasting no longer than the time to enjoy your beverage of choice!

Here is a quick look at what I am going to talk about:

- Day 1 - Template Documents
- Day 2 - Text Expander
- Day 3 - Macros
- Day 4 - Applying Styles
- Day 5 - Text blocks

I am going to start with something simple, but important -- templates. Templates allow you to reuse documents, without the worrying about the problems that come with reusing a document (e.g. exposing another client's information, errors of inclusion/omission, high risk of errors). Followed by a discussion of how using a text expander can eliminate a lot repeating yourself. On Wednesday, we are going to hit a hard topic, but once you understand Macros, it can be a game changer. Thursday, we will cover how to apply styles to a document without tearing your hair out. Finally, on Friday we will take it easy to prepare for the weekend and talk about how to use text blocks to simplify putting together a document. You will need to be using a version of Word 2010 or greater (Word for Office 365, Word 2019, Word 2016, Word 2013, Word 2010).

So, enjoy this weekend and I will see you bright and early on Monday to start our journey!

Day One - Template Documents

Hello and I hope the morning is off to a good start. Before we get started, we need to handle a few things. First, grab that beverage of choice. Next, take the time to enjoy a few sips and prepare yourself mentally. Not because the lesson is hard, but because I want you to focus on

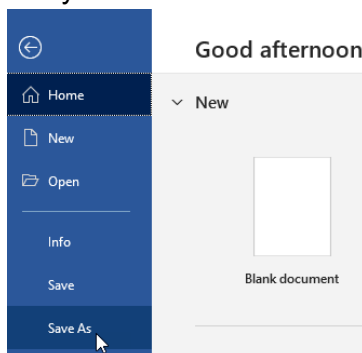
productivity through these next five days. What I am showing you is nothing more than a simple tool to help you in the journey to eliminate those tasks in your life that are boring, repetitive, or error prone. We only have so much time on this rock called Earth, don't waste it doing work that doesn't improve your or your client's outcomes!

Introduction

Ok, hopefully, everyone is now ready to begin. I want to first start out with what challenges we are going to solve. We are going to work on reducing typing and errors. We reduce typing by using templates, which are a special type of Word documents. It allows you to set up styling, fonts, boilerplate text, company letterhead, etc. While avoiding the issues of reusing a document or what one ABA article calls it "Find, Replace, and Modify" (here is the link to the ABA article [Document Assembly For Lawyers: Using Templates And Software](#)). While reusing a document isn't bad per se, it opens you up to potential lawsuits if you forget to remove client information or leave out important legal text. With better options available to you, why risk it? Without further ado, let get right to it, by showing you how to create a Word template.

Creating a Word Template

1. First, create a document and add any formatting you need. Maybe you do a lot of contract work, an ideal candidate for templating. Or maybe a non-disclosure agreement?
2. Once you feel it looks right, you will need to save the document as a template. To do this you need to click on **File** and then click on **Save As**.



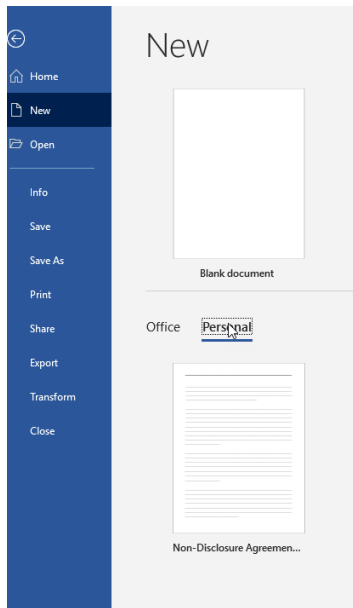
3. Next, select a location to save the document.
4. Give the template a name you will remember and select Word Template (*.dotx) as the file type.



5. Click **Save**.

Use your template to make a new document

1. When you are ready to use your template, just go click **File** and then click **New**.
2. Next, click on the **Personal** (or some versions of Office **Custom**) button.



3. You should see your template. Double click on the template and then you will see it, ready for you to modify. It is just that simple.

Conclusion

So, there you go, day one is complete, and your beverage should still be just the way you like it. Don't underestimate the power templates can bring to your firm. I also hope that this example started your mind to wondering how tools like this can help you be more efficient and effective. Never stop asking yourself, "is there a better way to do this?" Your time is valuable, don't waste it on boring and repetitive work.

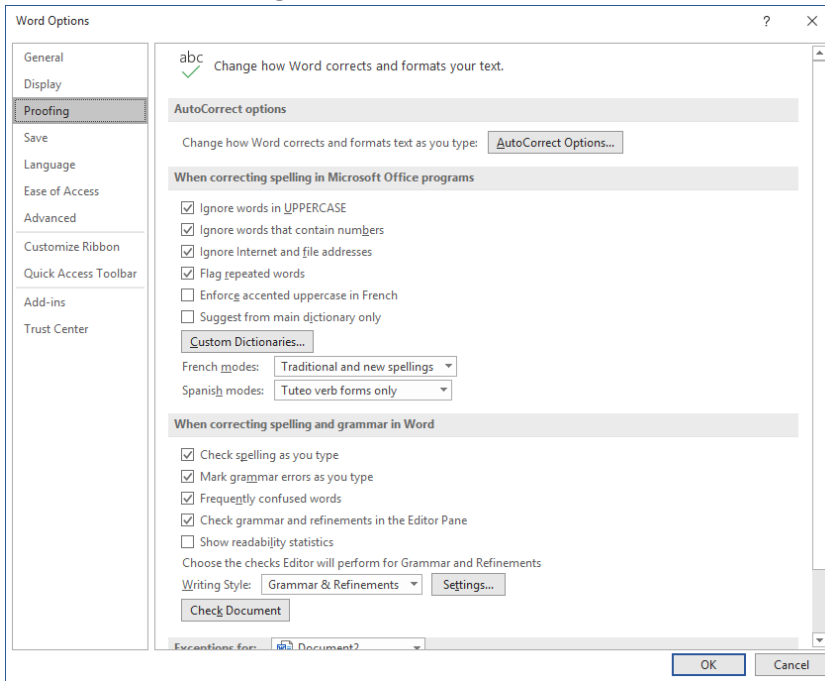
Day Two - Text Expanders

Introduction

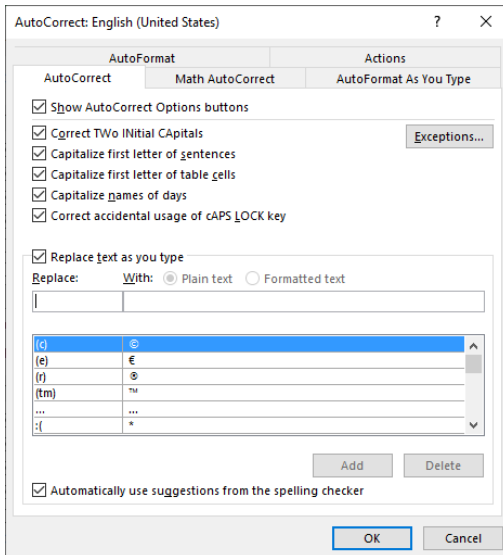
Ok, hopefully, everyone is now ready to begin and has their beverage of choice right beside them. Today we are going to look at a solution to solving repetitive text. Think of some small bit of text you are constantly having to type or always spelling wrong, such as an email address or legal term. How about if you could shorten it to a few letters and then let Word expand it to that text, sans any typing errors? Let's look at how you can put this feature to use. Also, put on that thinking cap to look and be on the lookout for other ways this could simplify your day!

Using Autocorrect as a Text Expander

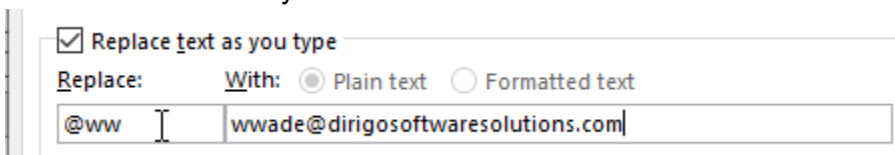
1. Open Word and click on **File** and then click the **Options** button.
2. Look for the **Proofing** section and click on it.



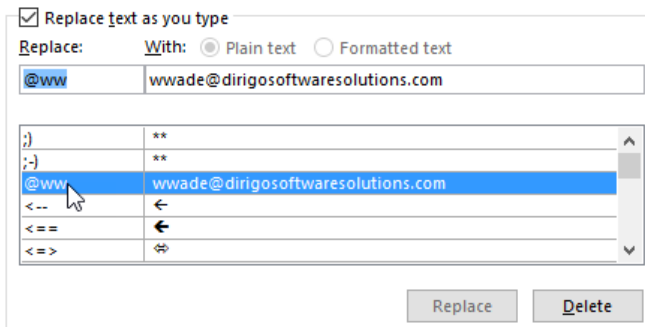
3. Next click on **AutoCorrect Options...**



4. There will be a checkbox called **“Replace text as you type.”** Check that option if it isn't checked already.
5. To add a new replace text, just enter in what you want to replace and what to replace it with. Hit the enter key or click the **Add**. This will add it to the list below.



6. Selecting an item from the list, you can also replace or delete it. So, if you added an item for email that then changes, it is a simple thing to update it. Deleting is even easier.



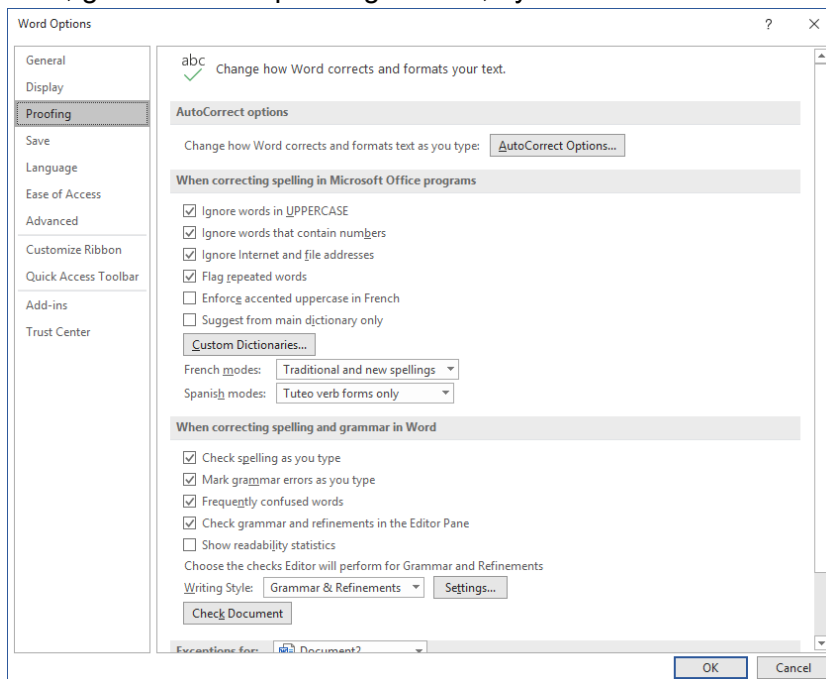
7. Once you are all done, click **OK** twice and you will be back at your document. Try out your new additions!

Note to use the option for formatted text (bolded, different fonts, etc....), you need to have selected something before opening the AutoCorrect Options window. Follow the below steps to handle those cases.

1. First, type into Word, the phrase or text you want to produce.
2. Make any formatting changes, such as italicizing a word or making it bold. I am using some simple text with a portion of it being italicized.

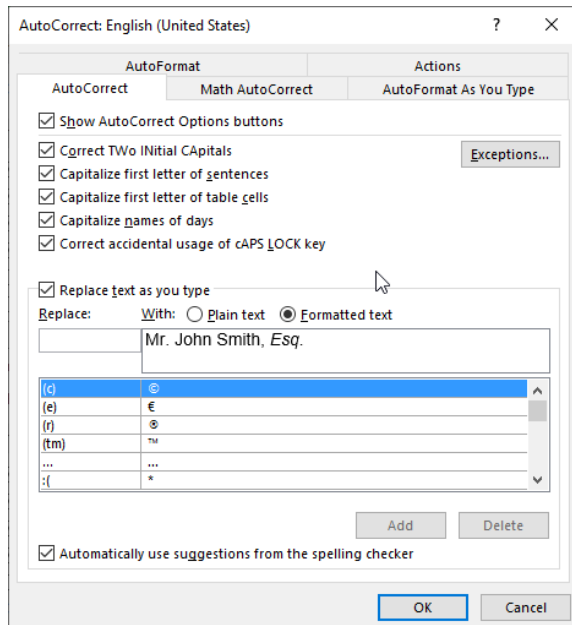


3. Select and copy that text.
4. Now, go back to the proofing section, by click on **File** and then clicking on **Options**.



5. Click on the **Proofing** section and then click **AutoCorrect Options...**

You should see the text you copied in the **With** textbox and the formatted text option selected.



6. Add the text you want to replace and then click **Add** or hit enter.
7. Click **OK** twice and you will be back at your document.

Conclusion

Another day is complete, and your beverage of choice should still be at the right temperature. We have put another feather in our cap and ready to use when we need it. Tomorrow we are going to tackle a bit more difficult topic, macros. So, come prepared with a positive attitude and a readiness to learn. Again, never stop asking yourself, “is there a better way to do this?” Your time is valuable, don’t waste it on boring and repetitive work.

Day Three - Macros

Introduction

Welcome back and happy hump day. Today we are going to tackle a more difficult topic of macros, so I hope you have prepared a stronger version of your beverage of choice! So, what are macros? Well, it really is nothing more than a series of actions that you can execute as a single command. Macro recorders are the programs that allow you to capture those actions. Word has one built into it, but you can buy macro recorders for other programs and even Windows and Macs. Hint, this creates a huge opportunity for automation in other things you do. Need to create a new client folder with required documents, create a macro!

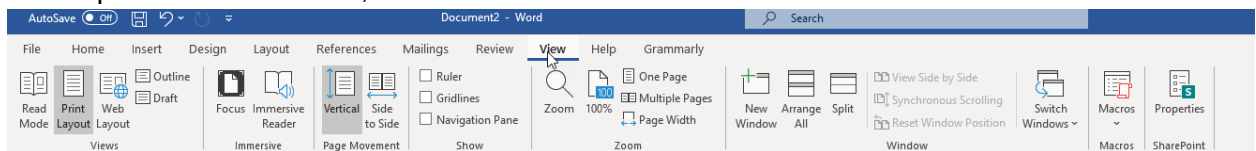
Before we go much further, I need to mention that there are possible security risks in using macros. Microsoft has done a lot to minimize this risk, but if you are not careful you can get into

trouble. So, unless you trust the source of a macro don't use it. If you get a macro enabled document from someone you don't know or trust, don't open it. I am not trying to scare you into not using macros as they are an extremely valuable tool, but you do need to be careful, as Uncle Ben said, "with great power comes great responsibility!"

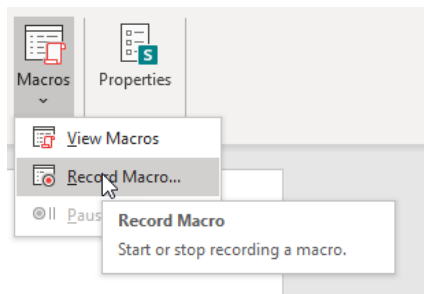
Ok, time to get back on topic. Let's look at how to create a macro in Word, starting with a simple example of inserting a section symbol (§). Normally, you would need to go through a bunch of different steps to accomplish this. Add up the number of times you need to do this, it gets expensive in wasted time.

Creating a Simple Macro

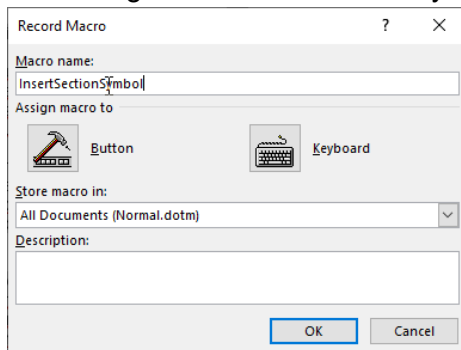
1. In an open Word document, click on the **View** tab.



2. You should see a Macros button, there is a small black arrow below the icon, click on that and select **Record Macro...**



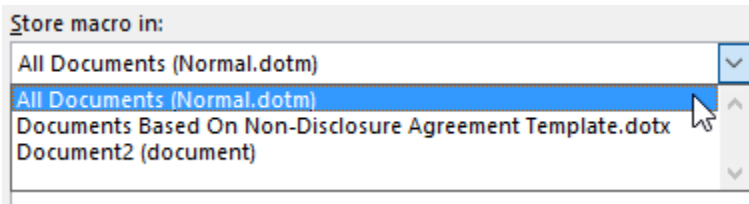
3. Type in a name for the macro. I typed in InsertSectionSymbol, but you can use something that makes sense for you.



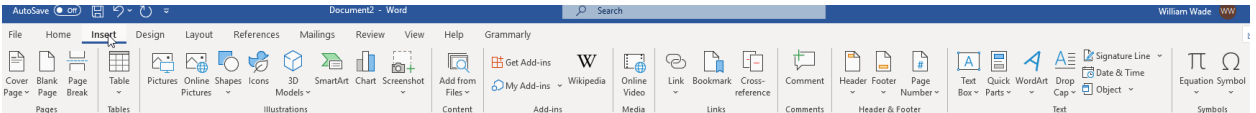
Note: You will see a section called "Assign macro to." For now we are going to do nothing, but I will circle back and explain in a bit more detail. Simply put, these just help us to define how we are going to execute the macro.

4. Where it states "Store macro in:," it defaults to All Documents (Normal.dotm). This means that the macro you are creating will be available in any document you work on.

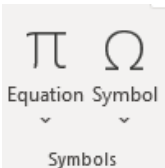
Normally, this is what you would want, but you might have a macro only for the document you are currently working on, in which case you would select the current document.



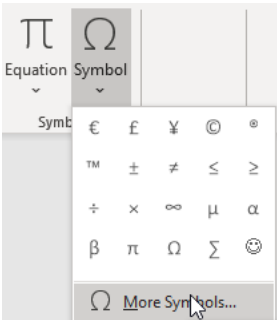
5. Click **OK**.
6. Now, the macro recorder is watching the actions we are taking. So for this scenario, you need to click on the **Insert** tab.



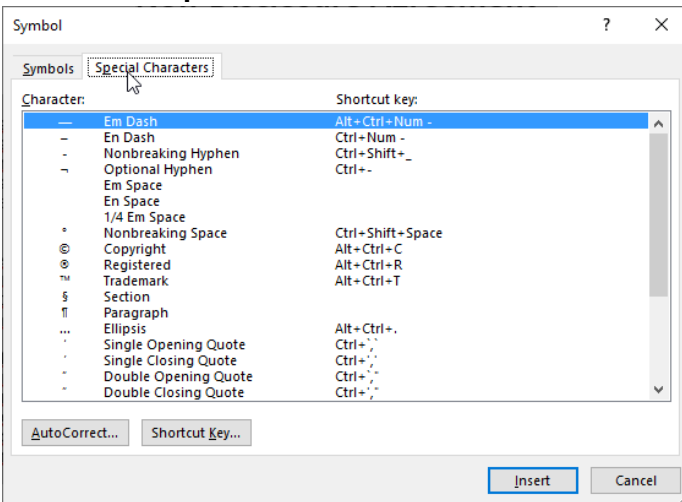
7. Click on the **Symbol** button.



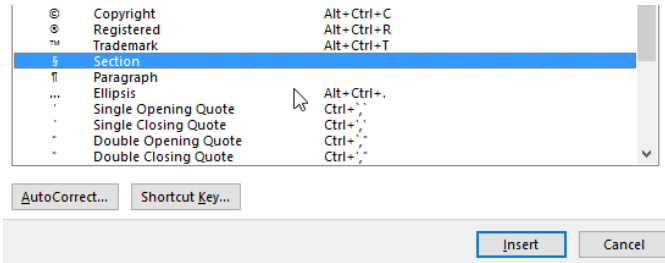
8. Then click **More Symbols...**



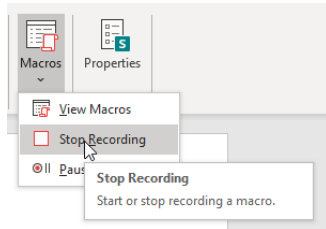
9. Click on the **Special Characters** tab.



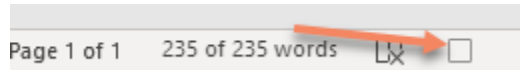
10. Look for the character called **Section** and select it.



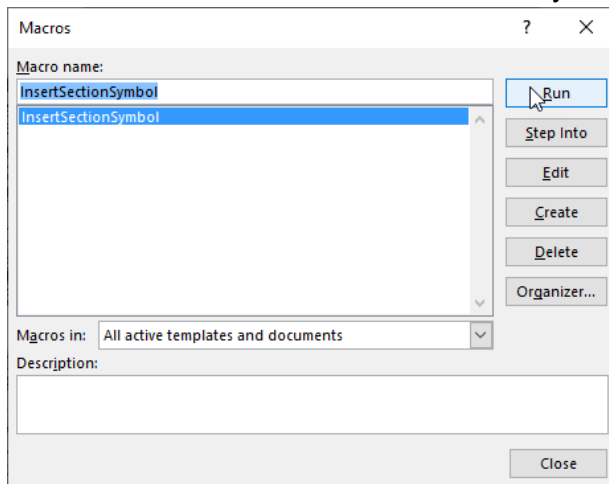
11. Click **Insert** and then click **Close**.
12. So, we have accomplished all we wanted it to, it is now time to stop the recording. There are a couple of ways to stop the macro recording.
 - a. You can click **View**, click on **Macros**, and then click on **Stop Recording**.



- b. You can click on a button in the lower left corner to stop the macro recording. It looks like a square with a light gray border.



13. With the recording done, you can now view it in the list of macros. If you go back to the **View** tab and click on the **Macros** button, you should now see it.



14. To run it, you just need to select the macro and click **Run** and it will insert a section symbol where your cursor was on the document!

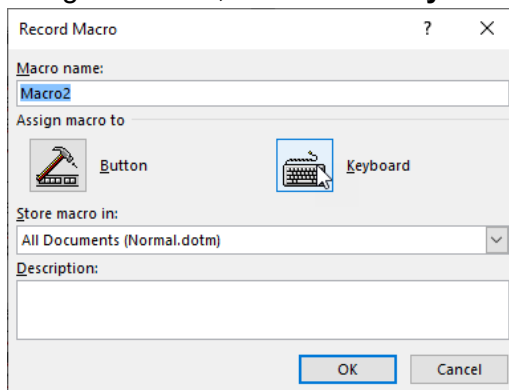
Executing a Macro

Now, doing this every time is not very convenient and isn't any improvement over what we had to do before. So, let's talk about ways we can simplify this. Remember when we came across

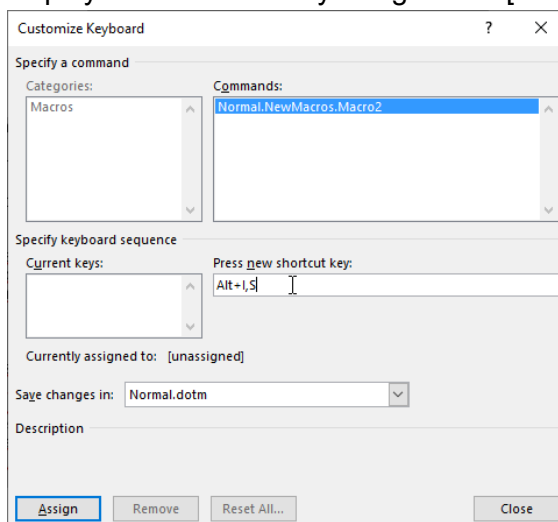
that section called **Assign the macro to**? Well, those were just shortcuts to what we are going to do next. The typical way you execute macros is either through a button or a keyboard shortcut. If you go with a button, it would be placed in the menu bar or the quick access toolbar. Let's take a look at how to set up each option.

Using a Keyboard Shortcut

1. Let's create a new macro. Don't worry, we will fix our first macro to use a button later. For now repeat the steps 1-4 from the previous section. When you see the section **Assign macro to**, click on the **Keyboard** button.



2. A window will pop up and in the "Press new shortcut key." Click in this box and here is where you will enter the short cut you want to use to execute your macro. I chose alt+i,s. Which means I held down on the Alt key and hit the i key and then the s key. You can enter any keyboard combination you want, but be aware that some are already in use, such as ctrl+v (paste). On the plus side, If you select one that is in use, it will display that as "Currently assigned to: [function]" under the Current keys: text box.

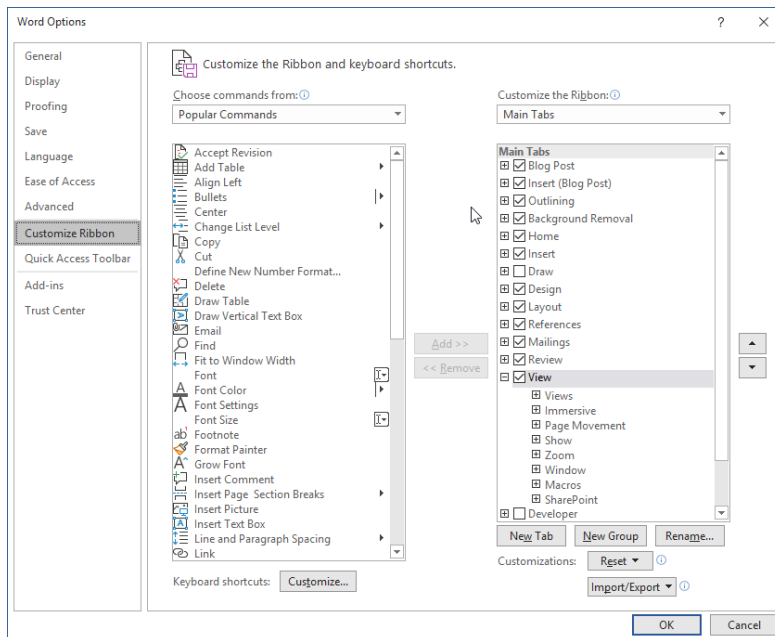


3. Click the **Assign** button and then click **Close**.
4. You will now return to the document and the macro recorder is running.
5. Pick back up on step 7 through to 12.

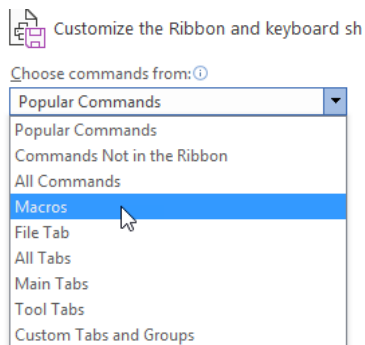
6. Test out your keyboard shortcut and you should see the section symbol be inserted where you have the cursor placed.

Using a Button

1. Now, we are going to reuse the macro we created before (I called mine InsertSectionSymbol).
2. Click on **File** and then click **Options**.
3. Next, click on **Customize Ribbon**.

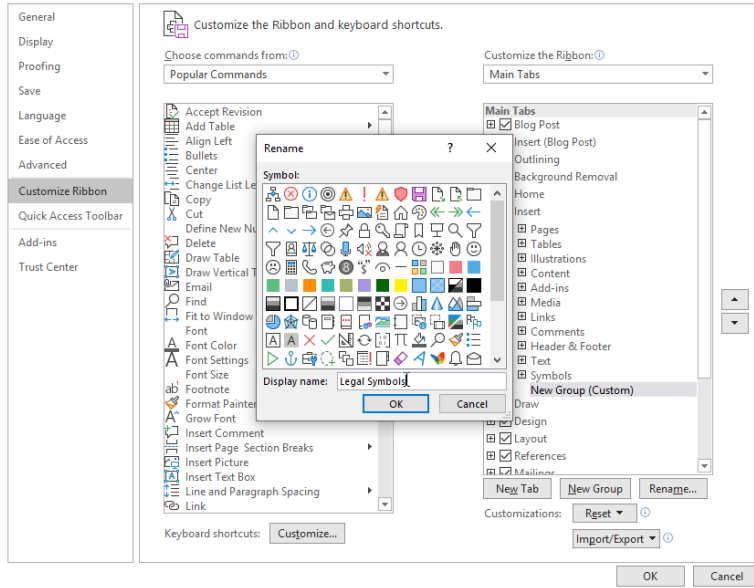


4. Under **Choose commands from**, click **Macros**.

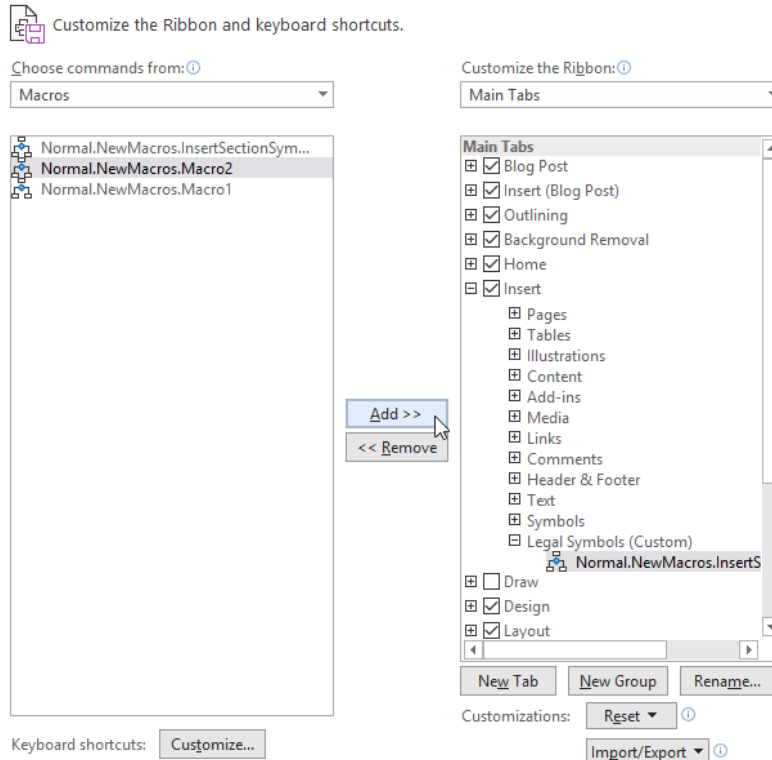


5. Click the macro you want.
6. Under **Customize the ribbon**, click the tab and custom group where you want to add the macro.

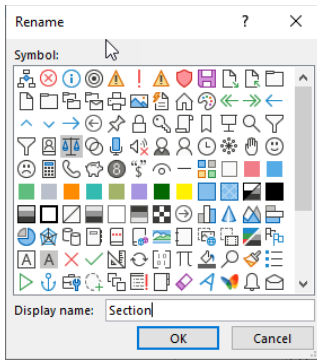
Note: If you don't have a custom group, click **New Group**. Then click **Rename** and type a name for your custom group.



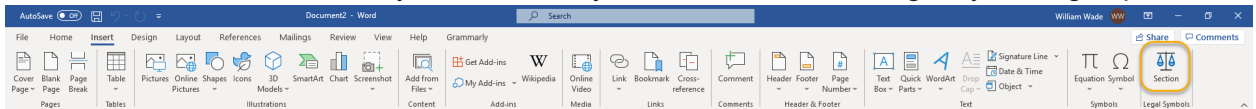
7. Click **Add** and you should see your macro in the group you selected.



8. Select the macro you just added and click **Rename** to choose an image for the macro and type a more user-friendly name.



9. Click **OK** twice.
10. Now click on the Insert tab and you should see your new button in the Legal Symbols group.



11. Click on it and you should see the section symbol be inserted where you have the cursor placed.

Conclusion

Phew, this was a lot longer than the other days, but your beverage of choice should still be good. Don't worry we will be tackling a easier topic tomorrow when we talk about styles. This should be a lot easier to get through and still enjoy your beverage of choice at the right temperature. For now, I hope you see the possibilities for macros. Realize that this is just barely scratching the surface. Macros can do a lot more, so when you ask yourself, "is there a better way to do this," consider that the answer might be using a macro! Remember your time is valuable, don't waste it on boring and repetitive work.

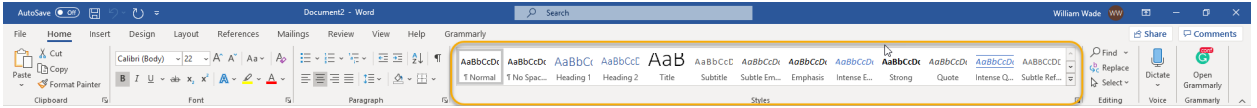
Day Four - Styles

Introduction

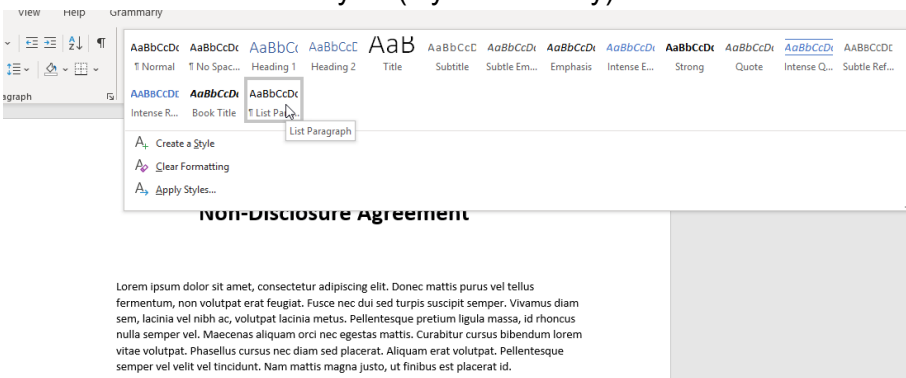
I assume by now that you have that beverage of choice nearby, so let's get started. Today we are going to talk about styles. Word Styles are nothing more than predefined fonts and formatting that can be applied to a document, making your documents have a consistent look. First, let's look at how you apply a style. Then we will look at how to create a new style. So, let's begin.

Selecting a Style

1. As always, start by opening Word.
2. Ensure you are on the **Home** tab, where you will see a list of styles towards the right of the menu bar.



3. Select the text you want to format. If you want to format the whole document, use ctrl+a to select the whole document.
4. You can hover over the styles (without clicking) and it will give you a preview of how the style will look once applied. If you don't see a style you want, you can click on the more button to see additional styles (if you have any).

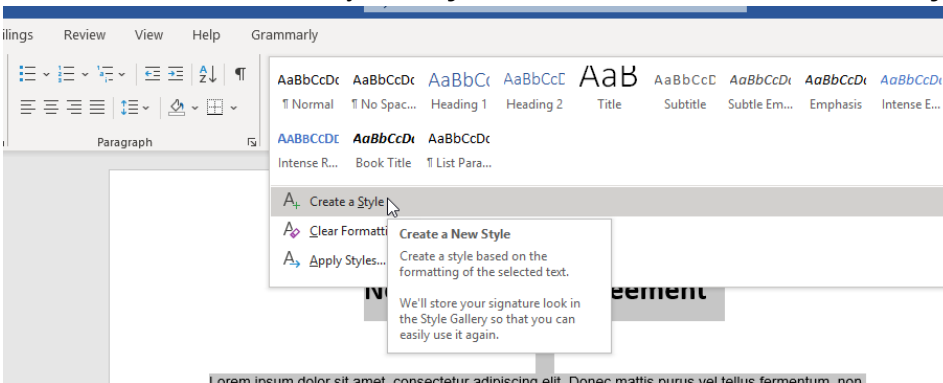


5. Once you find one you want, click on it and viola, consistent styling.

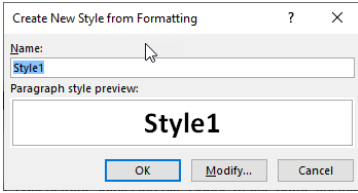
Now, you may have a style that hasn't been predefined for you. In that case you can either modify an existing style or create a new one. We will look at creating a new style as modifying a style is very similar to creating a new one, with less steps. To modify a style, just hover over the one you want to modify. Right click and then select **Modify...** With that all set, let's create our new style.

Creating a Style

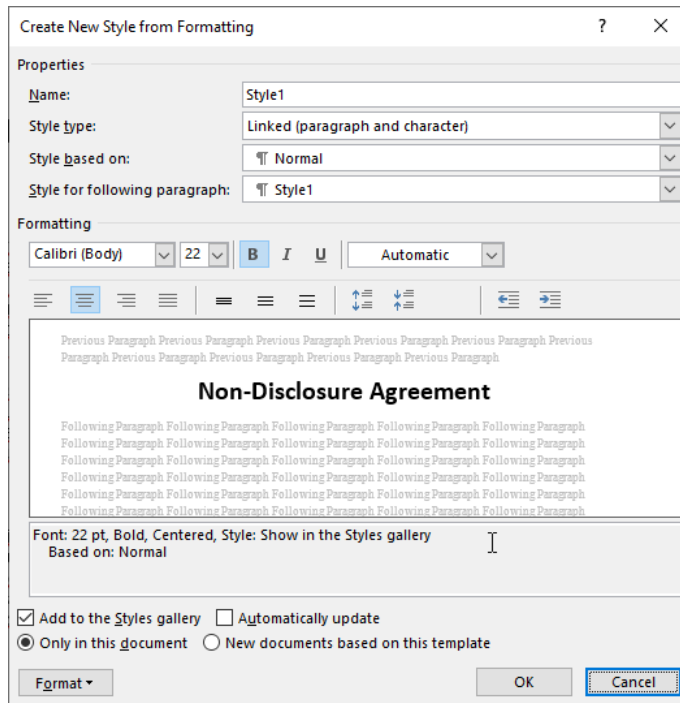
1. Select the text you want to base the style on. Ideally, you have a document with the look and feel you want, but it isn't required.
2. Click on the more button by the **Styles** section and click on **Create a Style**.



3. Give the style a name.



4. If the text you selected already has all the formatting you want to apply, just click **OK** and now you will see the style among all the other styles.
5. If you need to modify the styling, click **Modify**.
 - a. A window should pop up and allow you to make the changes you want. It is beyond our talk today to discuss all the options, but at the end I will have links to resources that go into more detail.
 - b. Click **OK**.



6. Now you can use this style like any of the predefined ones.

Conclusion

One day left and your beverage should be just right. Tomorrow we are going to talk about text blocks. The premise is similar to text expanders, but this is related to much larger sections of text. A real help when you need to add boilerplate clauses. See you tomorrow and don't forget to bring your favorite beverage along!

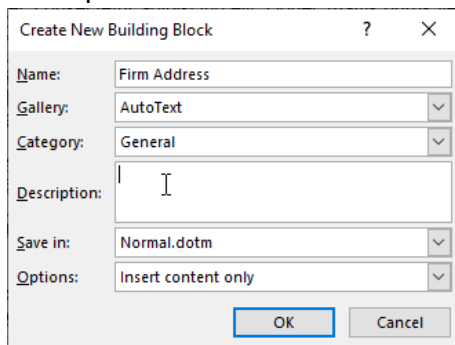
Day Five - Text Blocks

Introduction

We are finally on the last day and I have left it simple to finish off the week. There is a lot to process from this week and you really need to practice making this a useful part of your toolkit. Today we are talking about text blocks or as they are called in Word - AutoText.

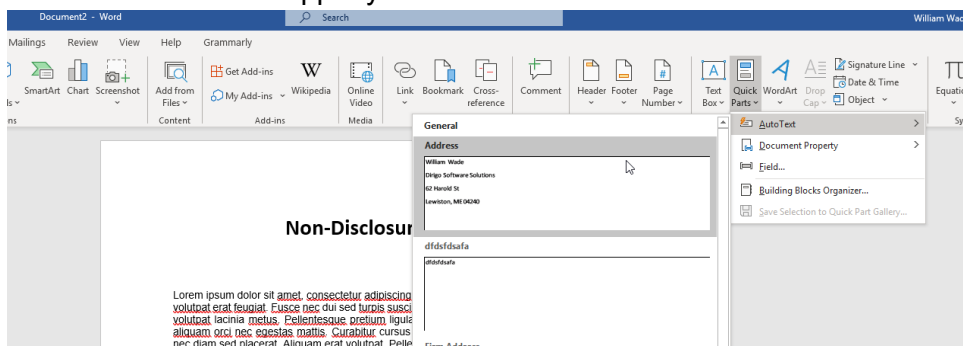
Creating a AutoText Snippet

1. First, type the text you want to be used. In this example I used an address.
2. Select the text and click **alt+F3**.
3. This will pop up a new window. Add a name that makes sense to you and put in a description if it needs one. Select any other options that you need and click OK.



Using AutoText

1. To use our new snippet, we just need to put the cursor where we want the text.
2. Next, go to the **Insert** tab and click on the **Quick Parts** button. Hover over **AutoText** and then select the snippet you want.



3. Then just click it to insert the text.

Conclusion

Look, I taught you some good stuff here and your beverage of choice is still at the perfect temperature. If you want more tips on how to automate your practice, give me a call or email me. In the time it takes for a coffee to cool down to the perfect temperature, I can set up a virtual meeting or phone appointment to help you make your practice more efficient, profitable and maybe even dare I say it enjoyable. Contact me at 207-740-5709 or email me at wwade@dirigosoftwaresolutions. Please don't hesitate to reach out to me, I especially appreciate calls or emails about how you have put technology to use in your own practice. For now, good luck and go enjoy that beverage, you earned it!

Helpful References

- [Office Support: Microsoft Office help and training](#) I use this site extensively when I am working with Word. While it is not legal specific, much of what it teaches can be applied to any business including the business of law.
- [Lawyerist.com](#) I have read some good articles on this site and in particular I liked this one - [Microsoft Word for Lawyers: A Complete Guide \(2020\)](#) It had a great section on styles that I recommend you take a look at.
- [The American Bar Association](#) The ABA does a lot of research into how technology impacts the legal profession. If you weren't aware, the ABA puts out a yearly tech survey and you can find the latest [here](#). It is where I found this useful article - [Document Assembly For Lawyers: Using Templates And Software](#)