

# ***DO'S AND DONT'S OF CREATING A "HEALTHY" WORD DOCUMENT***

## **The "Bread and Butter" of a Law Firm**

In a law firm, thousands of documents are created. They are exchanged with clients, courts and other counsel. They are sent electronically in different forms and converted into SEC filings. Documents are used and reused many times over. While the ultimate goal is to produce a correct and readable version of the document that can be successfully printed and sent electronically, the ability to collaborate with others is also critical. Law firms must create "**Healthy Documents**" in order to be successful.

## **Why Does It Matter How I Work With Word?**

Microsoft Word is a complex program offering many automated features such as table creation, automatic outline paragraph numbering, and automatic page numbering to name a few. To further streamline the use of key Word basic functions within a law firm environment, a number of third-party applications are commonly used such as **Legal MacPac (automatic outline numbering)** and **DeltaView (document comparison)**. Firm styles and other macros are also used in a typical law firm.

When Word is used optimally (correct use of Styles and other formatting procedures), the document has a much higher probability of retaining "stability" throughout its lifecycle. If Word is not used optimally (i.e., like a typewriter or using manual/direct formatting), many of the automated features will not always run successfully. The constant exchange of documents between firms is another reason it is important to work properly with Word documents. The movement of documents between different file formats and systems can increase the likelihood of document problems, particularly if it is not properly formatted to begin with.

**SPENDING TIME EARLY IN THE DOCUMENT CREATION PROCESS TO PROPERLY STYLE AND FORMAT THE DOCUMENT WILL SAVE A LOT OF FRUSTRATION AND PREVENT MORE TIME BEING SPENT LATER TO FIX PROBLEMS. THE BENEFIT WILL BE MINIMIZED RISK, COST REDUCTION AND PRODUCTIVITY INCREASES.**

## **Why Is My Document Having Problems? Some Common Occurrences**

Consider these common scenarios:

- Why is the paragraph numbering not incrementing properly?
- Why are funny symbols printing?
- Why does the text on the screen look different from the printout?
- Why are the track changes showing up funny?
- Why won't the document open?
- Why is the document freezing?

- DeltaView will not run on the document.
- The table of contents is not right.
- The footnotes are not appearing on the correct page.
- The formatting of the paragraphs is not consistent.

These are among some of the common frustrations experienced by users with legal documents. The way in which common tasks are performed is often at the root of many of these problems.

For example, there are different ways to copy text from one document to another. If this operation is not performed properly, codes and other macros can be introduced into the document. Consider for a moment that the internet is written using HTML and other coding. If text is copied from the internet into a Word document incorrectly, we are, in essence, copying “another language” directly into the Word document. While the document might “read” properly and may even “print” properly, there are things happening “under the hood of the document” we cannot see. These documents will ultimately begin to show signs of corruption.

The common practice of copying an existing document as the basis for a new one is also problematic. Many documents currently on our system were originally created outside of the firm. Other documents were created by our firm, but are documents that predate Microsoft Word. In both of these cases, unless the document is converted and properly formatted for the current environment, it is more likely that these documents will experience corruption problems. In addition to compatibility issues, there may be other metadata present in the document that can lead to risk management issues.

Documents containing outline numbering and table of contents can also pose problems. Whether the document is numbered using Native Word or MacPac, there are certain procedures that apply. When working with these features, care must be taken to follow proper formatting procedures. One of the main culprits is adding manual numbering within the document that already has automatic outline numbering applied. Copying text incorrectly from other documents can also cause problems with automatic paragraph numbering. These practices will often lead to serious problems with the paragraph numbering as well as running a table of contents.

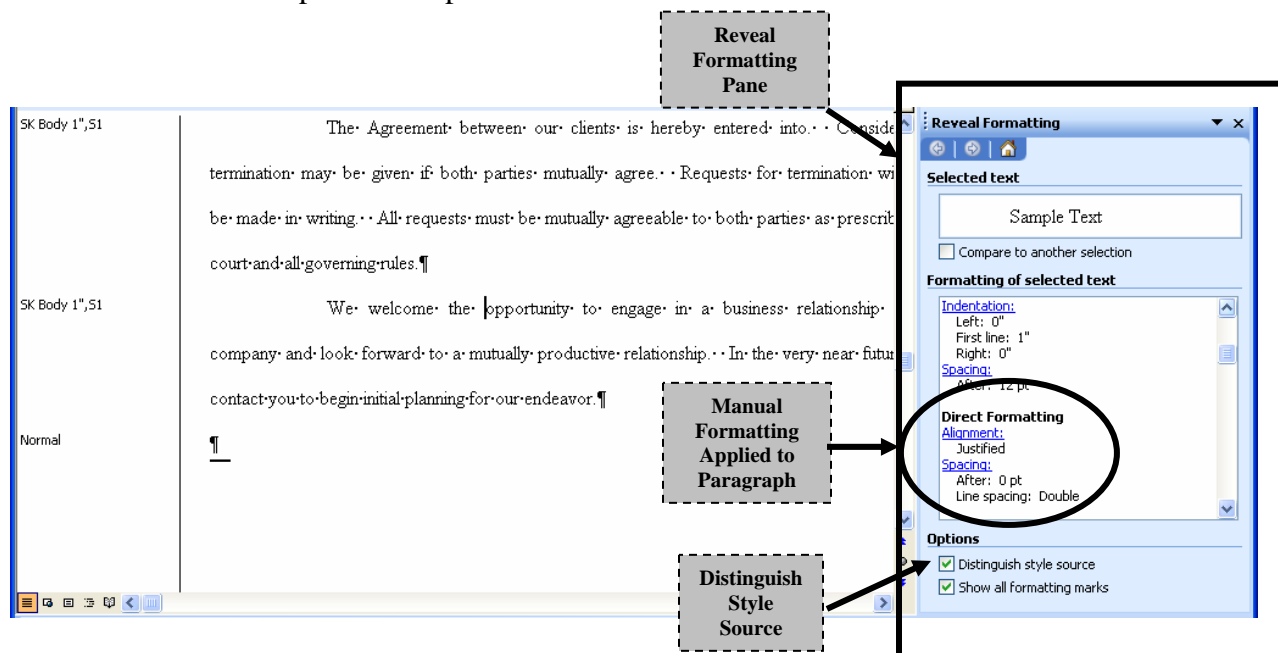
While many attorneys like to use Track Changes, it presents its own challenges within the sophisticated Word documents that are created. The more “round tripping” that occurs with a document containing Track Changes, the likelihood of experiencing problems increases.

An alternative to using Track Changes is to use DeltaView which is more accommodating to the sophisticated nature of documents now produced by law firms. DeltaView is also better suited to the type of collaboration that commonly occurs with law firm documents. **However, the actual DeltaView output file should not be saved and edited as a Word document.** Using a DeltaView redline in this manner can result in serious document corruption.

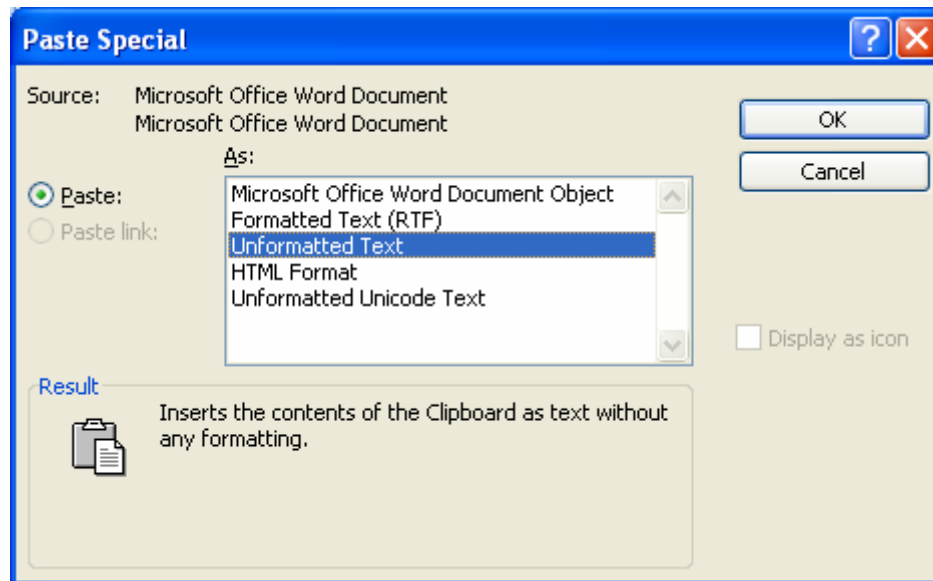
If simple guidelines are adhered to when working with Word documents, there is less of a chance of experiencing problems in the future. For the attorney or legal assistant who is not an advanced Word user, it means understanding when to work in a document and when to ask a secretary or word processing staff member to perform the work instead.

## Steps to Maintain Document Stability – Best Word Practices

- **DO** create documents using the correct firm template. Either select **File** → **New** → **Sewkis.dot** or use the **New Blank Document** button located on the Standard Toolbar. This will ensure the proper firm styles and settings are present in the document.
- **DO** take the time early in a document's lifecycle to properly convert and reformat a document using the appropriate tools. It will save money, time and frustration.
- **DO** apply styles to all documents. Styles not only ensure formatting consistency, but the correct use of styles helps ensure document stability throughout its lifecycle.
- **DO NOT** apply direct formatting to paragraph styles. Direct formatting means manual formatting applied directly to the paragraph without making the change to the style.
  - When troubleshooting a document, to show if direct formatting has been applied to a style, select **Shift + F1** and click anywhere on the paragraph in question.
    - The **Reveal Formatting** pane will be revealed. Put a check mark next to **Distinguish Style Source**.
    - Scroll down to the **Direct Formatting** section. Any paragraph formatting applied without updating the style will be revealed.
    - An easy way to remove direct formatting is to place the cursor anywhere within the paragraph. Press **Ctrl + Shift + N**. All direct formatting will be removed. Apply the desired style to the paragraph.
    - To affect multiple paragraphs, select the desired paragraphs first, and then perform steps.



- **DO** use *Edit → Paste Special → Unformatted Text* when copying text from other sources (i.e., internet, e-mails, or even other documents). This ensures that no “strange” codes are introduced into the document that could potentially cause corruption problems.
  - To use this method, copy the text from the secondary source as you normally would. Use *Ctrl + C* or *Edit → Copy*.
  - Do not use *Ctrl + V* or *Edit → Paste*. Instead use *Edit → Paste Special*. When the *Paste Special* screen is displayed, select **Unformatted Text**. Click **OK**.
  - The text is safely copied into the document without any formatting or coding.



- **DO NOT** use multiple MacPac schemes unless there is a clear need to utilize more than one outline format in a document. An example of when to use multiple schemes would be in the case of exhibits that are numbered using a different outline numbering style from the main section of the document. Use list number styles for simple numbered lists within documents that are not part of the outline.
- **DO NOT** attempt to change or fix outline numbering unless you understand how to work with this feature.
- **DO NOT** attempt to modify the normal style.
- **DO NOT** place attributes or styles (bold, italics, underline, etc.) on Page or Section Breaks. These elements should be always attribute free and styled with Normal.
- **DO** open Microsoft Word before opening DocsOpen. This ensures that Word loads properly and the third party applications are fully loaded in proper sequence.
- **DO** end documents with a proper end of document marker. This consists of a hard return that is styled in **Normal**.