Introduction

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Microsoft Word is one of the most venerable elements of the Microsoft Office suite—there are few applications more fundamental than putting words on paper—and one of the most important applications in the practice of law. No matter what area of law you practice, you probably have to put words on paper almost daily.

> "One of the hardest things in life is having words in your heart that you can't utter."
> —*James Earl Jones*

Just as with the last book, I began this project by asking myself the key question:

How can I make this book even better than the last one?

Not surprisingly the answer was essentially the same as last time: Most lawyers use Word, but few of them get everything they can from it. With this book I want to help you get the most out of Microsoft Word to make you more effective, more efficient, and more successful. I'm hoping you'll find this book to be useful, powerful, and maybe even a little enjoyable. I'm also hoping this book finds its way into the hands of legal assistants and paralegals—each of whom also spends a great deal of time in Microsoft Word and will, I hope, get some benefit from reading this.

To accomplish my goals I'm going to tell you about Word through my eyes. Through the eyes of a fifteen-year veteran of Microsoft Word who is also a twenty-two-year veteran of law office technology. I'm hoping that you'll keep turning the pages because every new page will bring a series of moments. "Gee whiz" moments, "Holy cow!" moments, and "Light bulb" moments. Hopefully, you'll put this book down repeatedly as

you rush to your computer to try that new trick. If this book ends up on your desk with a colorful array of sticky notes protruding from the pages, I'll know I've succeeded.

What's So Special about Word Processing?

We all use Word and it seems like typing, saving, and printing are relatively simple tasks. So why do you need a book to explain how to do it? Because the documents we create are complex and important—your law practice depends, to some degree, upon the quality of the documents you produce and the efficiency with which you produce them. In this book I'm going to try to help you do it more productively, more efficiently, and more enjoyably. And since this is a book aimed at lawyers and law firms, I'm going to skim over the features I don't think are very useful to lawyers and try to focus on those tools that you'll actually use. For example, I don't think most lawyers care much about SmartArt, so I'll not waste a lot of time on it in here. I could easily do 700 pages on Microsoft Word 2010 if I tried to cover every feature and option in depth. I'll save your time (and mine) and try to keep my emphasis on those features and capabilities that will matter to law firms. If you really want a large, comprehensive work on Microsoft Word 2010, there are some excellent general books on the market—anything with Beth Melton's or Stephanie Krieger's name on it is undoubtedly worth reading if that's what you're after.

Those Who Love Software or the Law Should Not Watch Either Being Made

I thought an exploration of how the Office 2010 suite was made would be enlightening here. The story really begins with Office 2003. When you installed Office 2003 or 2007, a funny little icon was added to the system tray (down on the task bar, next to the clock) where it sat, mysteriously, staring at you. When you eventually clicked on it, a dialog box was presented that offered to let you opt in to something called the "Customer Experience Improvement Program." The Customer Experience Improvement Program (CEIP) sends a lot of non-identifiable data back to Microsoft about how you actually use its software. Don't worry, it doesn't send any actual documents or e-mail addresses or anything like that. Instead it's primarily concerned with *how* you use the software—what buttons you click, how many documents you have open, how many sub-folders you create, how long you spend in each program (that's how we know that

Outlook stays open longer than any other Office application). The reason for gathering this historical usage data (known internally at Microsoft as "SQM" or "Service Quality Monitoring" data) is to make the next version of Microsoft Office better.

> "Designing Microsoft Office is like ordering pizza for 400 million people."
>
> —*Steven Sinofsky, Microsoft*

Prior to the CEIP, boxes of dry erase markers were used in brainstorming sessions. Huge quantities of Chinese food were consumed behind one-way mirrors in the usability labs, and survey after survey after survey was analyzed all in the name of trying to figure out how users actually used the products. The results of all of that work became Office XP, the immediate predecessor to Office 2003. Clearly a better way was needed, and the CEIP is it. Microsoft receives a mind-boggling volume of data from the CEIP; in fact, as of April 2006, the company had received more than 1.3 *billion* sessions of Office 2003 usage. That data taught a lot of interesting, useful, and surprising lessons and was of tremendous help in designing Microsoft Office 2010. As a result, Office 2010 has been built with volumes of direct feedback from real end-users in real-life situations.

> The most commonly clicked toolbar button in Microsoft Word 2003, and it's not even close, is "Paste"—followed, in order, by "Save," "Copy," "Undo," and "Bold."

Those results can be seen in several areas, most notably in the user interface (UI). Outlook 2007 replaced the old "File, Edit, View" menu structure with what is called the "Ribbon." (See Figure 1.1) Developed using CEIP data, the Ribbon is intended to be a more discoverable interface where every feature in the product is easy to find and use. The CEIP data also was used to find out what desirable features—features that users asked for—were rarely used, indicating that they were too hard to find.

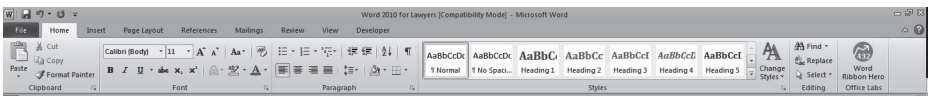

FIGURE 1.1

One key indicator that Office needed a new UI was that four of the top ten feature requests received from Word 2003 users were for features that were already in the product. People just didn't know how to find them! According to Jensen Harris, group program manager for the Microsoft Office User Experience Team (which means he's the lead dog on the team that designed the new UI), features like adding a watermark to Word documents were so hard to find that a lot of users asked how to do it or didn't

realize you could. With Office 2010, the feature is prominently located on the "Page Layout" tab, and Jensen has had a lot of users comment on what a "great new feature" it is.

More Bits for Power Users

Office 2010 is the first version of Microsoft Office to be offered in both 32-bit and 64-bit versions. It's not too important that you understand the technical details of that distinction. All you really need to know is that as computers have evolved, the number of bits they can handle at a time has grown. When I first started in law office technology we were beginning to see the migration from 4-bit to 8-bit computers. For most of the 15 years or so, 32-bit computers have dominated the landscape. In the last few years 64-bit computers have become more commonplace.

> "640K ought to be enough for anybody."
> —*Bill Gates*

Microsoft introduced its first 64-bit operating system for workstations with Windows XP 64-bit. Never heard of it? Almost nobody used it. Windows Vista came in a 64-bit flavor too, and it got a little more adoption than Windows XP 64-bit did, but not much. Now, with Windows 7, the 64-bit market is truly mature. It's almost impossible to buy a new computer that isn't 64-bit today, and it's almost always a better choice to buy Windows 7 in the 64-bit flavor. Why? I'll give you two reasons.

1. For all practical purposes, 32-bit operating systems are limited to 4GB of RAM. That sounds like a lot, but if history has shown us anything it's that RAM usage has tended to increase as programs have become larger and more powerful and the price of RAM (the memory that the computer uses for active processes) has fallen dramatically. As a general rule, the more RAM you have, the faster and more stable your computer will be. It's hard to find a new computer these days with less than 2GB of RAM, and we usually recommend clients start at 4GB and consider 6GB or 8GB if the budget allows. The 64-bit operating systems make that possible.
2. Windows 7 may be the last version of Windows Microsoft makes that is even available in 32 bit. It's fairly universally accepted that the 32-bit platform is on the luge ride to obsolescence. Investing in a new 32-bit system at this stage makes no sense unless you have key legacy hardware or software that demands it. And if you

do have such legacy hardware or software, you should be thinking hard about your ongoing commitment to that gear.

Most 32-bit hardware and software will work just fine with a 64-bit operating system.

When it comes to Microsoft Office, however, I'm going to temper that advice slightly. As of this writing, the 32-bit version of Office is still the wiser choice for most firms. The reason: few people really need a 64-bit version of Microsoft Office, and a number of add-ins and other pieces of software just don't work properly with the 64-bit version of Office (even though they run fine on the 64-bit version of Windows). Confused? I hope that by the time you're reading this book those problems have faded into the past, but as I sit here writing it, there are still some issues.

So Why WOULD I Want 64-bit Office?

The 64-bit version of Office is good for power users who are using *extremely* large files. The advantage, primarily more speed and stability, shows itself mostly on very large Excel workbooks and very large Microsoft Outlook mailboxes. Other than that, you probably won't see a lot of difference between the 32-bit and 64-bit versions of Office. Except, of course, that your add-ins will probably work better in the 32-bit version.

Making the Choice

Luckily, making the choice between 32-bit and 64-bit versions of Office is pretty easy—in fact *both* versions are in the box when you buy Office. You just have to decide, when you install, which version you want. If you're installing on an older computer (you can install Office 2010 on systems as old as Windows XP Service Pack 3), you're probably going to be forced into the 32-bit version anyhow. If you're installing on a 64-bit operating system, then you'll have the option to install the 64-bit version.

If you install the 32-bit version but find, down the road, that the 64-bit version becomes desirable and viable for you, you can always reinstall Office and choose the 64-bit version at that time.

So, to Be Clear . . .

We recommend that most of our clients getting new machines opt for Windows 7 Professional, 64-bit, and Microsoft Office 2010, 32-bit.

And Now, by Popular Demand . . .

Since you've probably already bought Word 2010 (seeing as how you're reading a book on it), I'm not going to try to sell you on why you should

go get it. Let me just briefly highlight some of the key new features of Word 2010 that lawyers are going to love. I'll explain them in more detail later in the book, but here's the teaser:

1. Improved Ribbon—it's a little cleaner in Office 2010 and a bit customizable, too.
2. New numbering formats.
3. Checkboxes available for forms or lists.
4. New Compare Documents option.
5. Metadata checking and cleanup, to protect your client and yourself.
6. Navigation pane helps you navigate long documents quickly and easily.
7. Save to PDF natively lets you create basic PDF files without additional software.
8. Building blocks help you assemble standard documents more quickly and easily.
9. Collaborative editing (If you have SharePoint).
10. Improved picture handling—use images to illustrate your point.
11. Backstage View—easier access to things you want to do with your document, like print or share.
12. Available 32- and 64-bit versions for real power users.

A lot of the other new features will really excite your consultant or IT person but might be a tad esoteric for you. I'll mention them throughout the book, but mostly I'll focus on the features and tools that you're going to use and care about in your daily practice.

So, let's get right into it. Turn the page for Chapter 2—A Quick Tour.