

TENTATIVE OUTLINE FOR 5 HOUR LINARES PRESENTATION
NOVEMBER 13 2018

1. Word Basic Settings (1 hr)

Microsoft Word Essentials for Legal Professionals

Microsoft Word has become an important tool in today's law firms and legal departments. Even so, very few lawyers and legal professionals have taken the time to learn some basic and crucial skills that inarguably help them throughout the day. This session focuses on the most needed yet underutilized features of Word specifically for legal professionals.

- Understanding the Word interface and essential features
- Using the Clipboard to more efficiently draft legal documents (PC only)
- Professional formatting techniques

2. Settings for Complex Documents (1 hr)

Creating Outstanding Legal Documents

Creating legal documents is a part of every lawyer's and legal professional's day-to-day practice. Knowing how to take advantage of a word processor's powerful automation and document development features can help any lawyer and legal professional serve their clients more efficiently and with minimized errors in their document products.

- Formatting pages & paragraphs in complex legal documents
- Creating bulleted and numbered lists
- Storing and retrieving boilerplate text to minimize grammatical errors

3. Styles function (45 min)

Applying Styles to Your Legal Documents Will Save Your Life (and Time and Money)

Styles a very important feature in Word and also one of the most misunderstood. A style is a collection of formatting instructions used repeatedly throughout a document to make its structure consistent. Styles are also used to categorize and identify parts of a document, e.g., heading, footnote or a citation. Adding numbers to a styles selection allows you to generate and update consistent outline numbering in legal documents and quickly generate a table of contents. Understanding and using styles can help legal professionals more efficiently draft, manipulate and control legal documents. Topics include:

- Understanding Styles
- Clearing Styles and Manual Formatting
- Formatting Text with Styles
- Using Quick Styles and the Styles Pane
- Creating a New Style
- Modifying an Existing Style
- Deleting a Style

4. Tables of Contents and Authorities (1 hr)

TOC:

A table of contents in Word is based on the headings in your document. Before you create your table of contents, apply heading styles Heading 1, Heading 2, or Heading 3 – understanding Styles is critical to creating a TOC.

- Creating a TOC
- Editing a TOC
- Marking Entries for a TOC

TOA:

A table of authorities lists the references in a legal document, along with the numbers of the pages the references appear on. To create a table of authorities, you mark citations and Microsoft Word inserts a special TA (Table of Authorities Entry) field in your document.

- Mark citations
- Create the table of authorities
- Edit or format a table of authorities entry
- Add or change a citation category for a table of authorities
- Delete an entry from a table of authorities

5. Document security (45 min)

Understanding Metadata in Your Legal Documents

Microsoft Word is particularly vulnerable to exposing such information which often is useless but at other times, can be quite significant and perhaps even privileged. This session highlights potential pitfalls of sharing documents and emails in their electronic form as well as discussing tools and techniques for avoiding issues when sharing documents and emails.

- Understanding Metadata
- How is Metadata Transmitted or Shared
- Removing Metadata with Built-In Removal Tools