

Getting More from Microsoft Word in Legal Practice

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↓ Practice file (.docx)

↓ PDF handout

Lawyers spend significant time working in Microsoft Word, often with lengthy documents and files that have passed through multiple hands. This session covers Word features that make that work faster and more reliable: controlling formatting and numbering, cleaning up troublesome documents, reusing standard text, and securing documents for filing or sharing.

Follow along (optional): download the practice file (a stay motion filed in the U.S. Bankruptcy Court for the District of Utah, with exhibit slip pages added) and work through the **Practice** boxes in each section, or just use this page as a reference later. This page covers more than we'll have time to demo.

The big idea: know what's possible

There are usually several ways to do anything in Word: a ribbon button, a right-click menu, a keyboard shortcut, a dialog box. You don't need to memorize them. The most valuable thing to take away today is **knowing what's possible**. Once you know a feature exists, you can look up the steps or ask an AI tool when you need them.

1. What is a Word file, really?

Why it matters: What you see on screen isn't everything that's in the file. Comments, tracked changes, author names, and hidden formatting all travel with the document.

A .docx file is a ZIP folder of XML files. Rename a copy from .docx to .zip and open it:

- word/document.xml – the text
- word/styles.xml – the style definitions
- word/comments.xml, docProps/core.xml – comments, author, and other metadata

When AI tools work with .docx files, they interact with the underlying code, not the visual editor. A well-structured document (real styles, real numbering) is easier for both people and AI tools to work with.

2. See what's really there

Why it matters: Inherited documents often look right but are built wrong (fake headings, typed numbers, formatting applied by hand). When a document misbehaves, the fix is usually obvious once you can see how it was built.

Tool	What it does	Windows	Mac
Show/hide ¶	Shows paragraph marks, tabs, spaces, section breaks	Ctrl+Shift+8	Cmd+8
Quick Access Toolbar	Keeps the tools you use most one click away (e.g., Show/hide ¶)	Right-click any button → <i>Add to Quick Access Toolbar</i> . If the toolbar is hidden: right-click the ribbon → <i>Show Quick Access Toolbar</i>	Word → Preferences → Ribbon & Toolbar → Quick Access Toolbar
Navigation pane	Lists every heading (empty if no heading styles are used)	Ctrl+F, then <i>Headings</i>	View → Sidebar → Navigation

3. Styles

Why it matters: If headings are just bold text, changing how they look means fixing every one by hand, and Word can't build a table of contents, number them, or show them in the Navigation pane. Styles tell Word *what* each paragraph is ("this is a heading"), not just how it looks, so one change updates every heading at once.

Styles pane (Ctrl+Alt+Shift+S (Mac: Home → Styles Pane)): lists every style and highlights the one the cursor is in. Check *Show Preview* to see what each style looks like.

Style area: shows the style name of every paragraph in the left margin. File → Options → Advanced → Display → *Style area pane width* (e.g., 1"), then View → Draft (Mac: Word → Preferences → View → *Style area width*, then View → Draft).

Modify a style: right-click the style in the gallery → *Modify*, or format one paragraph the way you want and right-click the style → *Update [Style] to Match Selection*.

Apply styles quickly:

- Select one bold heading → Home → Select → *Select All Text With Similar Formatting* → click the style
- Ctrl+Alt+1/2/3 (Mac: Cmd+Option+1/2/3) applies Heading 1/2/3; Ctrl+Shift+N (Mac: Cmd+Shift+N) applies Normal

Run-in headings (heading and body text in one paragraph): put the cursor right after the heading text and insert a **style separator** (Ctrl+Alt+Enter). The heading gets the Heading style (and shows up in the TOC and Navigation pane); the text after it stays Normal.

- *Mac:* there is no style separator command. Workaround: end the heading as its own paragraph, select only its ¶ mark, and format it as Hidden (Format → Font → Hidden).

Table of contents: References → Table of Contents. Update it with F9 (Mac: Fn+F9) or right-click → *Update Field*.

Practice (with the [DEMO] motion)

- **Title:** apply to the motion title in the caption. Set it to all caps, bold, character spacing expanded 1 pt (Font → Advanced), 12 pt space after.
- **Heading 1:** apply to MEMORANDUM and CERTIFICATE OF SERVICE. Same as Title, plus underline and small caps; *Keep with next* (Paragraph → Line and Page Breaks).
- **Heading 2:** apply to the bold roman-numeral headings (I. Background, II. Legal Standard, III. Argument, IV. Conclusion). In section 7 you'll link Heading 2 to a multilevel list (I., II., III.), with the numbered paragraphs (1., 2., 3.) as its next level in the Normal style.
- **Normal:** justified; *Widow/Orphan control* on.
- **Create a table of contents** right before MEMORANDUM.

4. Sections, headers & footers

Why it matters: Sometimes different parts of one document need different page setup: no page number on the caption page, two columns for a service list, no page numbers on exhibit slip pages, or a landscape page for a payment table. Section breaks divide a document into parts that can each have their own headers, footers, page numbering, columns, orientation, and margins.

Insert section breaks: Layout → Breaks → *Section Breaks*. *Next Page* starts the new section on a new page; *Continuous* starts it on the same page (e.g., to switch to two columns for a service list).

Headers and footers (double-click in the header/footer area; tools are on the *Header & Footer* tab):

- **Link to Previous:** on = same as the prior section; turn it off to make this section different
- **Different First Page:** e.g., no page number on page 1
- **Restart numbering:** Page Number → *Format Page Numbers* → *Start at: 1*

Line numbers (also a section setting): Layout → Line Numbers → *Restart Each Page*. Handy for negotiation calls (“page 3, line 12”).

Practice (with the [DEMO] motion)

- **Section break before the exhibits:** with ¶ showing, delete the page break before EXHIBIT “A” and insert a *Next Page* section break in its place.
- **Header on every page,** right-aligned, bold italic: *DRAFT – Attorney Work Product – Privileged and Confidential*
- **Motion:** no page number on the first (caption) page.
- **Exhibit slip pages:** no page numbers. In the slip pages’ footer, turn off *Link to Previous*, then delete the page number.

5. Security & filing

Why it matters: Filed and shared documents can reveal more than you intend: an old client’s name in the comments, the other side’s edits in tracked changes, a full SSN in an exhibit, or “redacted” text that’s only covered with black highlighting. These checks catch those problems before the document leaves your office.

Before a document leaves your office

- **Remove comments, tracked changes, and metadata:** File → Info → Check for Issues → *Inspect Document* (don’t remove headers/footers unless you mean to).
 - ▶ *Mac:* Review → Protect Document → check *Remove personal information from this file on save*. Accept/reject changes and delete comments manually first.
- **Check for personal identifiers** (Fed. R. Bankr. P. 9037) with wildcards (explained in section 6):
 - ▶ Full SSNs: [0-9]{3}-[0-9]{2}-[0-9]{4}
 - ▶ Long account numbers: [0-9]{8,}

- **Check for unfilled placeholders:** \[*\]
- **Highlighting text in black is not redaction.** Delete the text in Word before converting, or use a true redaction tool in your PDF software.

What Document Inspector looks for

Category	What can be hiding there
Comments, revisions, versions	Internal discussion; the other side's (or your) earlier wording in tracked changes
Document properties and personal information	Author, "last modified by," company, template path, custom properties like a client-matter number
Custom XML data	Data stored inside the file but not shown on the page, added by document management systems, SharePoint, add-ins, or templates (e.g., matter numbers, workflow status)
Headers, footers, watermarks	"DRAFT," "Privileged," old case numbers
Invisible content	Objects (text boxes, shapes) formatted as invisible
Hidden text	Text formatted as hidden: invisible on screen and in print unless ¶ is on
Collapsed headings	Sections folded closed, which a reader can skip right past
Embedded documents	A spreadsheet or document pasted in as an object, including the parts you can't see

Document Inspector doesn't catch everything: white text on a white background, or text covered by an image, still goes out with the file.

Control editing

- **Restrict Editing:** Review → Restrict Editing (Mac: Review → Protect Document): allow only tracked changes, only comments, or only filling in fields.
- **Password to open:** File → Info → Protect Document → *Encrypt with Password*. (Lost passwords can't be recovered.)

Save as PDF for filing: File → Save As → PDF → *Options* → check *Create bookmarks using: Headings*. Your heading styles become clickable PDF bookmarks.

Practice (with a copy of the [DEMO] motion)

- Add a comment and a tracked change, then run *Inspect Document* and remove *Comments, Revisions, Versions, and Annotations*.
- Look at what *Document Properties and Personal Information* found before removing it.
- Save as PDF with *Create bookmarks using: Headings* (after the Styles practice) and open the bookmarks panel in the PDF.

6. Clean up: Find & Replace and wildcards

Why it matters: Documents that pass through many hands pick up junk: pasted formatting, double spaces, blank lines used for spacing, inconsistent symbols. Fixing these one at a time takes hours; Find & Replace fixes them all at once.

Clear out inherited formatting

- **Ctrl+Space** removes manual character formatting (Mac: **Ctrl+Space**); **Ctrl+Q** removes manual paragraph formatting
- Paste without formatting: right-click → Paste Options → *Keep Text Only*
- **Format Painter** copies formatting from one place to another:

- ▶ Click once to apply it once; double-click to apply it repeatedly (Esc to stop)
- ▶ Keyboard: Ctrl+Alt+C copies formatting, Ctrl+Alt+V pastes it (Mac: Cmd+Shift+C / Cmd+Shift+V). *Older versions of Word use Ctrl+Shift+C / Ctrl+Shift+V instead.*

Find & Replace (Ctrl+H → *More* → *Special* for the codes below)

Find	Replace with	Fixes
^p^p	^p	Blank lines used as spacing
two spaces	one space	Double spaces after periods
^l	^p	Manual line breaks (Shift+Enter)

Wildcards: Find & Replace with patterns

Check *Use wildcards* to search for a *pattern* instead of exact text (e.g., “any 3 digits, a hyphen, 2 digits, a hyphen, 4 digits”). Word’s wildcards are its own version of what programmers call “regular expressions.”

Symbol	Means	Example	Matches
[0-9]	Any one character in the range	[0-9]	7
{n} / {n,}	Exactly <i>n</i> of the previous item; add the comma to search for <i>n</i> or more	[0-9]{3}	362
?	Any one character	s?t	sat, set
*	Any run of characters	\[*\]	[DEBTOR NAME]
\	Treat the next symbol literally	\[	[
< / >	Start / end of a word	<debt	debtor, not indebted
() + \1	Group part of the match, reuse it in the replacement	Find Section ([0-9]{3}) → Replace §^s\1	Section 362 → § 362

Useful patterns

- Unfilled template placeholders: \[*\]
- Typed paragraph numbers, including roman numerals (a tab, the number, a period, a tab): ^t[0-9IVX]{1,}.\^t
- Full SSNs: [0-9]{3}-[0-9]{2}-[0-9]{4}

Tips: use *Find Next* a few times before *Replace All*. Patterns match what you describe, not what you mean (“5.” could be a paragraph number or the end of “\$5.”). You don’t need to memorize the syntax: describe what you want to an AI tool and ask for a Word wildcard pattern, then test it.

Practice

- In the [DEMO] motion, find every typed paragraph number with ^t[0-9IVX]{1,}.\^t (use *Find Next* only; you’ll remove them in section 7).
- In any of the bankruptcy templates, find every unfilled placeholder with \[*\] (Find → *Reading Highlight* → *Highlight All*).

7. Numbering & cross-references

Why it matters: Typed numbers (“1.”, “(a)”) and typed references (“see Part III”) don’t update when you add, delete, or move a paragraph, so one late insertion means renumbering by hand and hoping you caught every reference. Numbering linked to heading styles, and cross-references that point to it, update themselves.

1. **Remove the typed numbers.** Replace (Ctrl+H) → *Use wildcards* → Find `^t[0-9IVX]{1,}.^t`, Replace with nothing. (See section 6 for how this pattern works.)
2. **Link numbering to your heading styles.** Home → Multilevel List → *Define New Multilevel List* → More.
 - Level 1 → *Link level to style*: Heading 2 → number style *I, II, III* → format *I*.
 - Level 2 → no linked style → number style *1, 2, 3* → format *1.* → uncheck *Restart list after* so paragraph numbers keep counting through each heading
 - Apply the list to the numbered paragraphs, then press Tab (or Home → Multilevel List → *Change List Level*) to make them level 2.
3. **Replace hard-coded references.** References → *Cross-reference* → Reference type: *Heading* (or *Numbered item*) → Insert reference to: *Heading number*. Check *Insert as hyperlink* to make it clickable (it stays clickable in the PDF).
4. **Move sections around** by dragging headings in the Navigation pane. Then select all (Ctrl+A) and press F9 to update cross-references.
 - Alt+F9 (Mac: Option+Fn+F9) toggles field codes so you can see which numbers are live.

Practice (with the [DEMO] motion, after the Styles practice)

- Remove the typed numbers (step 1) and set up the two-level list (step 2): I., II., III. for the headings; 1., 2., 3. for the paragraphs, counting straight through.
- In the Conclusion (¶ 15), add “for the reasons stated in Part” and insert a cross-reference to the heading number of *III. Argument*.
- In the Navigation pane, drag *II. Legal Standard* above *I. Background*, press Ctrl+A, F9, and watch every number and the reference update. Then undo.

8. Quick Parts: reuse text, type once

Why it matters: The same caption, signature block, certificate of service, and standard paragraphs appear in nearly every filing. Retyping or copying them from an old filing is slow and is how the wrong judge, case number, or Zoom passcode ends up in a new document. Quick Parts let you save a block once and insert it anywhere, and document properties let you type a detail once and have it fill in everywhere it appears.

Building blocks (save once, insert anywhere)

- **Save:** select the text → Insert → Quick Parts → *Save Selection to Quick Part Gallery* (Alt+F3). Give it a name and, optionally, a category (e.g., *Captions*, *Zoom – Judges*).
- **Insert:** Insert → Quick Parts → click the entry, or type its name and press F3.
- **Edit or delete:** Insert → Quick Parts → *Building Blocks Organizer*.
- **Where they’re saved:** by default, your personal *Normal.dotm* or *Building Blocks.dotx*, so only you have them. To share with your office, choose a firm template (.dotx) in the *Save in* box.
- *Mac:* Insert → AutoText (verify).

Good candidates from Utah bankruptcy filings

Building block	Why it’s a good candidate
Signature block (<i>DATED / firm / /s/ / Attorney for</i>)	On every filing; short, so an easy first one
Caption (attorney block, court heading, <i>In re</i> table)	Long and fussy to retype; the table comes through intact
Certificate of service	A building block can be an entire page

Building block	Why it's a good candidate
Zoom hearing paragraph, one per judge	Pick the judge from the gallery; meeting ID and passcode come with it
Court mailing address	Appears in several notices
Standard paragraphs: <i>YOUR RIGHTS MAY BE AFFECTED</i> ; jurisdiction and venue	Language that shouldn't vary

Document properties (type once, update everywhere)

- Insert → Quick Parts → *Document Property* → choose a property (e.g., *Title*). Insert the same property everywhere that detail appears.
- Edit any one of them and every copy updates immediately.
- Example: in the LF 9013-2 notice, *[Motion/Application/Objection]* appears five times. Bind each one to the *Title* property and change it once.
- Properties can go inside a building block, so a saved caption can pick up the debtor name, case number, and chapter automatically.
- Document properties are metadata. Removing document properties with Document Inspector (section 5) may affect them; check the text before filing.

Fields (dynamic text Word calculates): Insert → Quick Parts → *Field* → e.g., **PAGE**, **DATE**, **NUMPAGES**. This is where footer page numbers come from.

Practice

- In the [DEMO] motion, select the whole Certificate of Service page and save it as a building block (**Alt+F3**) in a new category called *Filings*.
- Open a blank document and insert it two ways: from Insert → Quick Parts, and by typing its name and pressing **F3**.

9. Make Word yours

Why it matters: Word's defaults were chosen for everyone, not for lawyers. A few minutes in the settings saves time on every document from then on.

Best habit: explore the settings. Every application has a settings screen full of features and default behaviors you can change. In Word, look through **File** → **Options** (Mac: **Word** → **Preferences**).

Settings worth a look

- **Advanced** → **Cut, copy, and paste:** set *Pasting from other programs* to *Keep Text Only* to stop importing other documents' formatting.
- **Advanced** → **Show document content** → **Field shading: Always:** see which numbers and references are live fields.
- **Advanced** → **Editing options** → **Keep track of formatting** and *Mark formatting inconsistencies:* Word underlines formatting that doesn't match nearby text.
- **Proofing** → **AutoCorrect Options** → **AutoFormat As You Type:** turn off automatic numbered lists or automatic hyperlinks if they get in your way.

Shortcuts you create

- **AutoCorrect for § and ¶:** copy the symbol, then File → Options → Proofing → *AutoCorrect Options*. Replace \s with § and \p with ¶ (pick something you won't type by accident). Consider deleting the entries that turn (c) into ©, (e) into €, and (r) into ®, which can misfire in lists like "(c)" and "(e)". Mac: Tools → AutoCorrect.
- **Keyboard shortcuts for Accept/Reject Change:** File → Options → Customize Ribbon → *Keyboard shortcuts:* *Customize* → Review Tab → **AcceptChangesOrAdvance** / **RejectChangesOrAdvance**. Mac: Tools → Customize Keyboard.

Templates

- **Save as a template (.dotx):** File → Save As → *Word Template*. Double-clicking a template creates a new document from it; to **edit the template itself**, open it from inside Word (File → Open) or right-click → *Open*.
- **Content controls** for fill-in templates (date pickers, drop-downs, locked text): enable the Developer tab (File → Options → Customize Ribbon), then Developer → Controls. Combine with Restrict Editing → *Filling in forms*.

Extras

More features worth knowing that we won't have time to demo.

Style Inspector & Reveal Formatting

Why it matters: When a paragraph doesn't look the way its style says it should, someone has added formatting on top of the style. These tools show exactly what was added, so you can remove it instead of guessing.

Tool	What it shows	Windows	Mac
Style Inspector	The paragraph style, the character style, and any manual formatting layered on top (e.g., "Normal, Plus: Bold"), with a button to clear each layer	Styles pane → <i>Style Inspector</i> button (bottom)	(not available)
Reveal Formatting	Every formatting setting for the selected text; can compare two selections	Shift+F1	View → Reveal Formatting

Hard spaces & hyphens

Why it matters: Word breaks lines at spaces and hyphens, so "§" can end up alone at the end of a line with "362" on the next, or a case number like 24-25156 can split across two lines. A nonbreaking ("hard") space or hyphen looks the same but keeps both sides together.

Character	Use it for	Windows	Mac
Nonbreaking space	§ 362, 11 U.S.C., p. 5	Ctrl+Shift+Space	Option+Space
Nonbreaking hyphen	Case numbers like 24-25156	Ctrl+Shift+-	Cmd+Shift+-

In Find & Replace, ^s is a nonbreaking space and ^~ is a nonbreaking hyphen, so you can fix a whole document at once (e.g., replace "§" with §^s).

Links & long URLs

Why it matters: Links in filings and emails should go where they say and shouldn't carry tracking data. And a long URL has no spaces, so Word can't break it and leaves a gaping line instead.

Hyperlinks (Ctrl+K (Mac: Cmd+K))

- **Web page or file:** paste the address; the *Text to display* can be anything, so hover to check where a link actually goes.
- **Place in this document:** link to a heading or bookmark (good for long briefs and tables of contents).
- **Email address:** creates a <mailto:> link; can pre-fill the subject line.
- **Cross-references** (section 7) with *Insert as hyperlink* checked are clickable internal links, including in the PDF.
- **Tracking tags:** links copied from AI tools, search results, and social media often end with tags like utm_source=chatgpt.com. Anything starting with utm_ tells the destination site where the click came from. Delete it before putting a link in a filing or email, but keep the rest of the address: some links need what follows the ?.
- Stop Word from turning typed web addresses into links: AutoCorrect Options → *AutoFormat As You Type* → uncheck *Internet and network paths with hyperlinks*.

Characters that let long words and URLs break

Character	Use it for	Windows	Mac
Optional hyphen	Where a long word may hyphenate	Ctrl+-	Cmd+-
No-width optional break	An invisible break point inside a long URL (no hyphen appears)	Insert → Symbol → More Symbols → <i>Special Characters</i> , or type 200b then Alt+X	(not in the menu; verify)

Practice

Click to copy this link to 11 U.S.C. § 362 (as an AI tool might hand it to you):

https://www.govinfo.gov/content/pkg/USCODE-2023-title11/html/USCODE-2023-title11-chap3-subchapIV-sec362.htm?utm_source=chatgpt.com

- Paste it into a justified paragraph in Word and look at the line above it.
- Insert a few no-width optional breaks (after a / or &) and watch the line close up.
- Press Ctrl+K and change *Text to display* to the address without `?utm_source=chatgpt.com`. Hover over the link: the address underneath still has the tracker.

Shortcut cheat sheet

Action	Windows	Mac
Show/hide ¶	Ctrl+Shift+8	Cmd+8
Styles pane	Ctrl+Alt+Shift+S	
Reveal Formatting	Shift+F1	
Heading 1 / 2 / 3	Ctrl+Alt+1 / 2 / 3	Cmd+Option+1 / 2 / 3
Normal style	Ctrl+Shift+N	Cmd+Shift+N
Remove character formatting	Ctrl+Space	Ctrl+Space
Remove paragraph formatting	Ctrl+Q	
Copy / paste formatting	Ctrl+Alt+C / Ctrl+Alt+V*	Cmd+Shift+C / Cmd+Shift+V
Style separator	Ctrl+Alt+Enter	(not available)
Save selection as Quick Part	Alt+F3	
Insert Quick Part by name	type name, then F3	
Update field(s)	F9 (Ctrl+A first for all)	Fn+F9
Toggle field codes	Alt+F9	Option+Fn+F9
Insert hyperlink	Ctrl+K	Cmd+K
Find & Replace	Ctrl+H	Ctrl+H
Repeat last action	F4 or Ctrl+Y	Cmd+Y
Change case	Shift+F3	Fn+Shift+F3
Move paragraph up/down	Alt+Shift+↑/↓	Ctrl+Shift+↑/↓

Action	Windows	Mac
Nonbreaking space	Ctrl+Shift+Space	Option+Space
Nonbreaking hyphen	Ctrl+Shift+-	Cmd+Shift+-
Track Changes on/off	Ctrl+Shift+E	Cmd+Shift+E
Insert comment	Ctrl+Alt+M	Cmd+Option+A
Search Word's commands	Alt+Q	

* Older versions of Word use Ctrl+Shift+C / Ctrl+Shift+V.

Questions?