

## Configuring Word and Outlook 2002

**A**lthough most people use Word or WordPerfect "out of the box," this is a mistake, because they are depriving themselves of a great deal of power and increased ease of use that is afforded by both programs.

This article focuses on configuring Word 2002 with particular reference to users coming from WordPerfect. Most of these options are also applicable to earlier versions of Word.

### Installation

Configuration starts with your installation. You should never use Word's default installation, because by default it does not install document converters for WordPerfect files. Therefore if someone tells you that Word "cannot open" your WordPerfect file, it is likely that the program was installed using the default settings. When you install Word be sure to use custom settings and install WordPerfect converters.

Installing WordPerfect Help and/or WP keystrokes may seem like a good idea. However, the keystrokes listed are those used by WP 5.1, not any of the Windows versions of WordPerfect. If you install WP keystrokes, the keyboard will default to WP5.1 keystrokes. I do not recommend this. A much better comparison of the two

programs' functionality is found in WordPerfect help under "Keyboard Shortcuts" and "Microsoft Word Help". You might want to print this out for ease of reference.

Language settings. Word 2002 ships with a primitive speech recognition tool which is definitely not ready for prime time. Not installing this function will save you a lot of hassle (getting rid of it once installed is problematic).

### Configuration

Once Word is installed, you should go through and tweak the default settings to the way you want. Settings are found under Tools|Options ("Options") and Tools|Customize ("Customize"). I suggest you review them all. Many "weird" or unexpected results in Word can be traced to one of these settings. The following are settings I recommend: you may choose additional or different options.

By default, Word now shows truncated or variable menus (including your most recently used functions). This means you can never tell where something really can be found and can be extremely disconcerting. (Go to Customize|Options|always show full menus). Also check "show the keyboard shortcuts on menu options" option.

Smart Tags. This new feature is a mixed bag. On the one hand, it can be useful for importing information from Outlook. On the other hand, its main function is to "leap" to a web site directly. This could be useful for online reference to court cases, but it opens the door to both abuse and viruses. You may wish to turn it off. (Options|Save|Embed Smart tags off)

Do full justification like WP 6.1. Word does "full justification" by adding spaces between words, which leads to an ugly "spacy" look. WordPerfect adjusts space between both words and letters which leads to a much "smoother" look. (Options|Compatibility|Do full justification like WP 6.x)

Configure your custom dictionary either by importing a list of words into it or by running a number of your standard

documents through the spell checker and adding words to the custom dictionary. "Custom.dic" is an ascii (plain text) file and can be edited in Notepad. In Windows 2000, it is found under Documents and Settings|username|ApplicationData|Microsoft|Proof.

The grammar checking function will just cause annoyance (especially for legal writing). Turn it off at Tools|Options|Spelling & Grammar.

Make sure you leave paragraph symbols turned ON. Microsoft stores format information for a given paragraph in the symbol at the end of the paragraph. Deleting a paragraph symbol (especially the last one in a document) can lead to unexpected results. (Options|View|Paragraph Marks).

One copy of Word or many copies? By default, Word opens a separate copy of itself for each document you create. Unless you have lots of memory (if you get a new PC using Windows 2000 or Windows XP, it is worth springing for 512Mb of memory), this can create problems. You can change this setting so that only one copy of Word is running: (Options|View|uncheck Windows in Taskbar). If you do this and have multiple documents open, select Windows in the menu bar to see the various documents.

Page Setup. Word defaults to left and right margins of 1.25". Most law firms use 1" margins. Go into File|Page Layout. Change the margins as needed, then click the "Default" button at the lower left of the Page Layout window to set those margins as your default for all future documents.

### Track Changes

Unless you really need them, turn Track Changes OFF. There are many formatting problems with track changes in Word 2002, not least of which is that it makes the word count function unpredictable, which can have serious consequences when submitting briefs to court (this was a problem that existed in Word 97 and was then fixed by Microsoft, but has popped up its ugly head again). It also can prevent you from choosing how deleted text is displayed. (Tools|Track Changes)

Make sure you set Tools|Options|Security to Warn before sending file with

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### About This Newsletter

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Contact Heckman Consulting at:

One Fencove Court

Old Saybrook, CT 06475

Tel: (860) 395-0881

Fax: (860) 395-0386

email: [heckman@heckmanco.com](mailto:heckman@heckmanco.com)

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tracked changes. While this can be annoying (you get the warning every time you print a document), it can also save you a lot of grief. Otherwise, if you send your document to opposing counsel they may be able to see any changes you made when you were editing different versions of the document. However, even this setting does not eliminate all “metadata” and you should consider purchasing Payne Consulting’s Metadata Assistant ([www.payneconsulting.com](http://www.payneconsulting.com)) if you routinely exchange documents with other firms.

Finally, Word 2002 offers the option to send documents to Microsoft in the event of a crash. Since there is a possibility that sending a document to Microsoft could be construed as breaching attorney-client privilege (probably a slim one, but better safe than sorry – that’s why you carry malpractice insurance), I recommend against doing this as a matter of policy.

### Button Bars

The final area to customize is your button bars. Both Word and WordPerfect ship with what might be called “demo button bars,” that is, ones that contain neat features if you are doing a demo, but which you will likely never use in actual document production (especially in a legal environment). Everyone will have their own favorites: my recommendation is to create buttons for frequently used functions that are more than one level deep in the menu structure.

Style Separator. Word 2002 now lets

you put two styles on the same line (part of Microsoft’s effort to catch up with functionality WordPerfect has had for years). However, this option does not appear on any menu and must be added to the button bar to function. From the View menu, choose Toolbars | Customize. Select the Commands tab and “All Commands” from the Category list. Select InsertStyleSeparator and drag it to the standard toolbar.

Two productivity features that are not used enough are AutoText and AutoCorrect. You will want to review the Tools | AutoCorrect functions. In particular, in the AutoFormat as you Type section, consider turning off the “Apply Built-in Heading Styles” and the “Replace Internet ...paths with hyperlinks,” as well as “Set... Indent with Tabs.” You may wish to make other changes as well.

### Outlook

The main thing is NOT to use Word as your email editor. It will create endless problems. Tools | Options | Mail Format and uncheck “Use MS Word” and “Use MS Word rich text.”

### Security Issues

Using Microsoft products is an open invitation to virus attacks. There is no substitute for standard anti-virus practices: (1) always view, never open an email from anyone you don’t know or one you are not expecting from someone you do know; (2) turn off the viewer pane in Outlook (anything that appears here is automatically “opened”); (3) turn ON file extensions to prevent viruses with double extensions from slipping through (e.g., Anna.jpg.vbs); (4)

depending on how paranoid you are, rename cscript.exe and wscript.exe in the windows (or winnt) directory to prevent viruses from executing – note: this is the most extreme step and may have unwanted side-effects, so this step is not for everyone. Also, you want to have an up-to-date anti-virus program with weekly updates for both your server and workstations. Norton and McAfee are two leading anti-virus makers.

You have to apply security patches for Outlook and Internet Explorer as well as for Word. Outlook uses IE to render HTML email and for other functions, so even if you use Netscape you still have to worry about patching Internet Explorer. In addition, Microsoft’s “critical patches” are notoriously buggy (the most recent one, for example, mysteriously changes the font in some Outlook screens). So you need to be careful about applying Microsoft patches, but you also need to apply them. If you are using Windows XP, go to Control Panel | Performance and Maintenance | System and set Automatic Updates to choose before you download.

### Resources

There are many resources for information concerning Word. Two of the best are Payne Consulting’s Word 2002 for Law Firms (available at any major bookstore) and Woody Leonhard’s newsletter at [www.woodyswatch.com](http://www.woodyswatch.com), “Woody’s Office Watch – Weekly advice and commiseration from Woody Leonhard, Certified Office Victim” which features up to date information on all subjects Microsoft. ■

Heckman Consulting llc  
One Fencove Court  
Old Saybrook, CT 06475

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