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The Greatest Hidden Windows and Office Tricks for Lawyers

Written by Dan Pinnington

Presenters:
Dan Pinnington
Peggy Duncan

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For lawyers and law firm staff alike, decent abilities in Microsoft Windows and the applications in Microsoft Office (Word, Excell, Outlook and PowerPoint) are an essential part of practising law and working in a law office. This paper reviews the essential Windows and Office features and skills that every lawyer and law office staff person should be familiar with. Some of these you may know, others are not so obvious. It is really worth your while to work through the paper and make sure you know the features and skills that will be most helpful for the work that you do.

Windows

This section reviews the essential Windows skills and some practical Windows tips with which every lawyer and law office staff person should be familiar.

Learn keyboard shortcuts

Odds are your hands are on the keyboard most of the time. Taking them off to reach for the mouse just breaks your rhythm and slows you down. With keyboard shortcuts you can do almost everything you can do with a mouse – the key is learning the shortcuts for the various programs you use. Basic Windows and document editing shortcuts are described below. Take time to learn the shortcuts for the most common tasks you complete in the programs you most frequently use. You will be able to complete things much faster.

To learn and use keyboard shortcuts you should be familiar with the syntax for describing them. Simply remember that a plus sign (+) between two or more keys means that you press those keys, in the order they are listed, almost simultaneously, moving from left to right. For example, a capital B would be described as Shift+B. You release them in the opposite order.

When you are trying to learn new keyboard shortcuts, remember that old habits don't easily fade away. You'll find yourself reaching for your mouse without thinking about it. To help you remember to use new shortcuts, try putting a Post-it on the edge of your monitor as a reminder.

Alt+Tab for switching between programs

Switching between open programs is one of the most frequent things we all do as we work on our computers. For this task most of us use a mouse to select a button on the task bar. There is a much faster way. Pressing Alt+Tab will open a rectangular grey pop-up window in the centre of your screen. It will have an icon for each program that is running on your computer. Hold down the Alt key, and repeatedly press Tab to jump from one icon to the next. To help you find the window you want, the text from the title bar of each window appears in a box at the bottom of the pop-up. Simply release both keys when you get to the window you want. In this pop-up window, the icons are presented, from left to right, in the order you last looked at their respective windows. This means that the window you were in previous to the current ones just one Alt+Tab away. This lets you jump back and forth between two programs in the blink of an eye.

Moving, minimizing, maximizing, restoring and closing windows

I expect that on occasion you will want to look at two or more windows at the same time. Perhaps you want to compare text in different documents, or cut and paste parts of one document to another. So now we need to learn about moving and resizing windows

Let's look at the minimize, maximize, restore and close caption buttons (and their equivalent keyboard shortcuts). These buttons appear in the top right corner of every window on your computer.

To make a window completely disappear by closing it, click on the close button (an "X"), or press Alt+F4.

To make a window disappear from the screen by shrinking it to a button on your taskbar, click on the minimize button (a "-"). To open a minimized window to its previous size, simply click its taskbar button.

The maximize button (a "□") expands a window to fill the entire desktop. To make a window appear in a size that is less than a full desktop, click on the restore button (two overlapping squares).

The title bar is the bar across the top of every window. You can double-click a window's title bar to change it back and forth between maximize and restore sizes. Drag and drop a non-maximized Window's title bar to move it around your desktop.

Windows vs. dialog boxes

You should be aware that there are two types of windows that can appear on your desktop. A program like Word or WordPerfect opens in a fully functional window. Dialog boxes are primarily used to communicating with or configure a program. They have a close caption button, and sometime a help caption button (it looks like a question mark). They never have a minimize or maximize button. The most commonly used dialog box is the Print dialog box. Dialog boxes don't appear on the task bar if their program is minimized. More on dialog boxes in a future column.

Resizing windows

After selecting restore, you have a window that fills only part of your screen. To change the height or width of a window, put you mouse pointer over the one of the window's edges. When the pointer changes into a double-headed arrow, drag the border to make the window larger or smaller. To change the height and width simultaneously, go to any window corner, and when the pointer changes into a diagonal double-headed arrow, drag the corner in any direction. You can't resize a window when it is displayed in a full screen (maximized).

Arranging all open windows

Let's get real fancy and explore the ways in which you can simultaneously arrange multiple windows.

To simultaneously minimize all open windows and dialog boxes, click the Show desktop button () on the taskbar. It is only available when the Quick Launch bar is displayed. If the Quick Launch bar is not displayed, right-click an empty area on the taskbar, point to Toolbars, and then click Quick Launch.

Pressing the Windows logo key () and M will also minimize all windows. +Shift+M will restore windows to their pre-minimized sizes.

You can also reduce all open windows to taskbar buttons by right-clicking an empty area on the taskbar and selecting clicking Minimize All Window. To restore all the windows to their previous state, right-click an empty area on the taskbar, and then click Undo Minimize All.

Cascading and tiling windows

Now for the fanciest part: If you right-click an empty area on the taskbar, you will be given three choices: Cascade Windows, Tile Windows Horizontally, or Tile Windows Vertically. The Cascade option stacks all windows in a diagonally stacked pile so that the title bar for each window is visible. The Tile options automatically resizes all non-minimized windows so they appear like floor tiles [do you want screen shots here?]

When using the cascade and tile options, windows reduced to taskbar buttons will not be displayed. This makes it easy to cascade or tile just a few selected windows, rather than every window for every program that is open on the computer. To restore your windows to their previous state, right-click an empty area on the taskbar, and then click Undo Cascade or Undo Tile.

Cut, copy and paste

Why retype things when you don't have to? The ability to transfer text or other data from one program to another via cut, copy and paste is one of the most powerful features of Windows. To move or copy text or other data (e.g. a picture) you must first select or highlight it. Next, to move the text, press Ctrl+X or Cut on the Standard toolbar (the button with scissors). To copy the text, press Ctrl+C or click the Copy button (two white sheets of paper). The text you are moving or copying is now in the Windows Clipboard, a temporary holding area. Now move your cursor and click where you want to place the text you are moving or copying. This can be somewhere else in the source document, another document in the same application, or even a completely different program. To add or "paste" the text in the new location, press Ctrl+V or click the Paste button (a clipboard with a sheet of paper). The text will appear in the new location. If you want to clean up the format of pasted text, use Paste Special.

Paste Special

Want to add text from a website or other source to an e-mail or Word or WordPerfect document and not deal with formatting issues (i.e. just get the basic text with no formatting)? You can use the Paste Special function to do this. Highlight and "copy" the text you want to copy and paste. Next, place the cursor at the point you want to add it to your document. But instead of clicking the "Paste" icon, click on "Edit", then "Paste Special", and then select the "Unformatted" option. The text will adopt the format of the receiving document and any formatting from the source document will be lost.

Use a "right click" for format and configuration settings

There are many formatting and configuration settings buried away in various menus and dialog boxes. They can be very hard to find. The "right click" button on your mouse comes to the rescue and makes many of these settings available with a simple right mouse click. These options and features are "context sensitive" – in other words, you will be presented with a list of choices

that are relevant to the item, field or text you are right clicking on. For example, in Outlook, right clicking on an e-mail in your Inbox presents you with Open, Print, Reply, Reply all, Forward etc. Right clicking on text in a Word document gives you access to font, text and paragraph formatting settings. You can right click on almost everything on your desktop – try it!

Use Paste Special to Clean-Up Text

Moving text with the cut and paste commands, either from one application to another, or within the same application, is one of the most powerful features of Windows. It can also be one of the most frustrating features, especially when the pasted text doesn't appear as you had expected or wanted.

In many programs you can control how Windows pastes data with the Paste Special command. This tip reviews how this command works in Microsoft Word. The steps outlined for Word are identical for pasting text in many other Windows programs.

At one time or another, all Word users will have had problems pasting data. Many lawyers will have experienced this when moving text from WordPerfect to Word, or vice versa. Often the alignment and spacing of pasted text make it very difficult to read.

Here's how you can use the Paste Special command to control the format of pasted text. First, highlight the text that you want to copy, click Edit, then Copy (or Ctrl+C if you prefer using this keyboard shortcut). This puts the highlighted data into the Clipboard. The Clipboard is just a temporary place for holding text that is being moved or copied from one location to another.

Next, click on the location you want to paste the text you are copying. Then, click on the Edit menu, and select Paste Special (not Paste, which would be your usual selection). This opens the Paste Special dialog box. It gives you several different options for the format of text you are pasting. The "Unformatted text" option is the one that will clean up your pasted text. Select it, and then click OK to paste the data.

The Unformatted text option will paste bare, unformatted text only. All other formatting information will be stripped out, including bold, underlining, italics, indents, bullets etc. If the text you are pasting had various fonts or complex formatting, you will have to manually change fonts and recreate all this formatting. Although doing this can be time-consuming, it will sometimes be easier than trying to fix a document that has problems due to formats that did not convert properly, in particular when moving text from WordPerfect to Word.

Remember that you can use the Paste Special Unformatted text option to paste text copied from a PDF file. Select the text within the PDF with the Select Text tool, or with a Ctrl+A. Note also that in the text pasted from a PDF file with the Unformatted text option will have a hard return at the end of every line. You will have to manually remove these returns. In later versions of Acrobat you can use the File|Save As command to save a PDF file in another format, including Word. In many cases this will let you avoid having to manually clean up hard returns.

Many Windows programs have a Paste Special command, and some have other format options that will help you. Excel for example, has about a dozen different options for reformatting pasted text. Next time you need to clean up text, remember the Paste Special command.

Enlarging Windows Navigation Elements

Does your cursor dance in a circle every time you try to close a window or move down a page with a scroll bar? With a few simple tweaks, you can make it much easier to click on key navigation elements.

Larger monitors with higher resolutions are a good thing. They let you see more stuff on your screen. But when viewed at a higher resolution, basic Windows navigation elements such as caption buttons and scroll bars can become quite small or skinny. This can make them harder to click on, which will slow you down in your work.

If you find these navigation elements are too small for you, there is great news. Windows lets you make them as big (or as small) as you want. Of all the tweaks that make Windows more usable, these are among the best.

Middle-aged persons with eyes that are not as strong as they used to be (that would be me) will find these tweaks to be especially helpful. So will novices who are just learning how to point and click with a mouse or touchpad, as well as anyone trying to work on a laptop on a bumpy airplane ride.

Changing Display Properties

In all versions of Windows, you change the size of Windows navigation elements in the Display properties dialog box. To open the dialog box, click on Start, point to Settings, click on Control Panel, and then double-click on Display. Or (the faster way), you can right-click on the image behind the icons on your desktop and select Properties.

Once you are in the Display properties dialog box, you need to click on the Appearance tab. Windows XP users have one extra step: Click on the Advanced button.

Next, look for the Item drop-down box. It lists the different navigation elements in the Windows interface that you can change the size and color of, and also—in appropriate cases for elements that include text—the font and font size and color.

Bigger Caption Buttons

When it comes to increasing the usability of Windows, few things will be more life changing than enlarging the size of your caption buttons. Okay now, I know that at least a few of you are

asking, "What the heck are caption buttons?" They are the little square buttons in the top-right corner of every window on your screen. They let you close, restore and minimize or maximize a window.

To resize those little squares, select Caption Buttons in the Item drop-down list. Click on the up or down arrows next to Size, and watch the Preview pane to see the effect of the change. When you have the size you want, click on Okay to apply your change to your desktop. You will find that just going from the default 18 up to 21 makes a big difference. Call me old and blind, but I prefer a really big target and have set them to 23 on my computer.

These numerical values tell Windows how many pixels wide each navigation element should be. Pixels are the tiny individual colored dots that make up everything that is displayed on your screen.

Note that increasing the size of your caption buttons will also make the buttons on your taskbar slightly larger.

Wider Scroll Bars

We all use scroll bars for moving around documents and Web pages, and making the bars just a bit wider will make them much easier to click on. Under the Item drop-down list, select Scrollbar. Next, use the up or down arrows next to Size to find the width you want. The default is 16. I have mine set to 21. Again, watch your changes in the Preview pane, and when you like what you see, click on Okay to keep the change.

Note that making your scroll bars wider will also make the up and down arrows on your scroll bars larger, which will make them easier to click on as well.

Changing the size of the caption buttons and scroll bars will give you the most bang for your buck. But look through the other things listed in the Item drop-down list. Alternatively, you can click on the various elements in the Preview box, and then make configurations changes to them.

Icon Spacing

Here's another element change that some people might find helpful for squeezing a bit more info onto their desktops: the vertical and horizontal spacing of icons. In both cases, the default is 43. Decreasing that number will squeeze the icons together, which is useful if you'd like to see more icons in any given window. Increasing it will spread them out, which is useful if you want to see more of longer file names.

Font Size and Color

Within the Item drop-down list, you can also individually change the font, size and color of text that appears in title bars, dialog boxes, menus and the like. While making individual changes may make sense in some circumstances, the better option will be to make a global change by increasing the Windows font display size. In Windows XP, you can do this by selecting Large or Extra Large in the Font Size drop-down on the Appearance tab. In Windows 2000, go to the Settings tab, click on Advanced and then on the General tab, and then select from Small, Large or Other.

The Fine Print re changes

While all of the foregoing adjustments can make your computing easier, be very careful when you make changes in the Display properties dialog box. You can easily render your computer unusable. For example, you can't see blue text on a blue background, now can you? After you make any change (and I suggest you only make one at a time), carefully look at what is in the Preview box. If you don't like what you see, hit Cancel to exit without saving the changes you have made.

Any changes you make will be saved until you make further changes, or until you choose a different theme. Going back to the Windows Classic or XP themes will reset all your changes to the default settings.

Lastly, note that some programs (especially older ones) may not recognize and implement certain of your changes, in particular when it comes to larger font sizes.

Mouse Tips

All of us spend countless hours a day unconsciously pawing our mice. Here are a few tips on how you can do more with this often overlooked and ubiquitous computer rodent.

Make your mouse more sensitive:

As most people use their mouse or touchpad as their primary Windows navigation tool, it is worthwhile to spend a few moments learning how to do more with this humble 2 button tool.

Few things annoy me more than sitting down to help someone with a computer problem only to find that I have to move the mouse about three feet across the desk to get the cursor to move just a few inches across the screen. Good exercise perhaps, but how can these people get any work done?

On a laptop, the equivalent is moving your finger across the touchpad three or four or even more times to move the cursor completely across the desktop. Arrgh!

By default Windows seems to require a relatively large mouse or touchpad motion to move a cursor across a desktop. Fortunately it is very easy way to make your mouse more sensitive, that is, make it so that a smaller mouse movement moves the cursor further across the desktop.

Assuming your IS Department hasn't locked you out, you can change your mouse configuration , by clicking on Start; selecting Settings, then Control Panel; and then double-clicking on the Mouse icon. This opens the Mouse Properties dialog box.

Look for the Pointer Options or Motion tab. Within this tab you will see a Motion or Movement slider. By moving the slider from away from slow towards fast, you can make your mouse more sensitive. Try moving it to about three-quarters of the way to fast.

But be warned, don't speed your mouse up too much at once. It will take you some time to adjust to a faster mouse. Initially you will likely find that you can speed it up a fair bit. After getting used to working at that faster setting, you will likely find you can speed it up a bit more.

I like to have a very sensitive mouse and touch pad. On my laptop about ¾ of a stroke across the touch pad will move the move completely across my desktop. And just an inch or so on my mouse will do the same. Find a speed that works for you.

A faster pointstick can be helpful too, but if you are a heavy pointstick user you will likely find that an acceptable faster mouse or touchpad setting will be too fast.

Within the Mouse Properties dialog box you can also change some other mouse settings, including your double-click speed and cursor size. Look around to see if there are any other mouse tweaks that will help you.

The amazing right-click

If you are right-handed, your right-hand index finger will be a lean mean left-clicking machine. In case it isn't obvious, a left-click is a click on the left mouse button – unless you are left-handed of course. If you re left-handed, just swap right for left, and vice versa, in the following comments.

I want to focus on the right-click (a click on your right mouse button), which few people use to its full potential. You can do amazing things by right-clicking on almost everything on your screen.

A right-click is real powerful because it gives you way to instantly jump to various features, format and configuration settings. And the key: the options presented to you are “context sensitive.” In other words, the choices are going to be relevant to the item or text that you are right-clicking on.

For example, In Outlook, right clicking on an e-mail in your Inbox presents you with Open, Print, Reply, Reply all, Forward etc. Right clicking on a blank spot on your calendar will let you create new appointments, and configure the calendar.

In Word, right-clicking on text gives you font and paragraph formatting, bullets and numbering, the dictionary, synonyms from the thesaurus, and more.

One of my all-time most favorites: In Word a right-click on a misspelled Word will give you a list of correctly spelled alternatives, and the correct one is almost always at the top of the list.

Try right-clicking the various things on your screen. Do it now. You will be amazed what you find!

Word

In a law office setting the word processor is probably the most commonly used type of software program. Unfortunately, with word processors, and indeed all software, the majority of computer users take advantage of only the most basic features. Whether you are a beginner, intermediate or even advance user, there are always little tips and tricks you can learn to help you create the documents you need for your practice. This part of the paper highlights several helpful tips for Microsoft Word (many of which also work in the same or a similar fashion in Corel WordPerfect).

Switching between documents

On occasion you will want to jump from one document to another within a single program. For example, switching between two or more letters within Word. Use Ctrl+F6 to do this. Hold down the Ctrl key, and repeatedly hit F6. Again, release both keys when you get to the document you want. This shortcut works on many, but not all, Windows programs.

Jumping text shortcuts

Even the most experienced computer users often take the long road when it comes to editing text and moving around a document. They're either clicking away like crazy with the mouse, or using the arrow keys to move the cursor around a document, one character or line at a time. With a few simple shortcuts you can move around a document much more quickly. When editing a document, the following shortcuts help you jump a whole word, or even a whole paragraph, with a single press of an arrow key:

- Ctrl+Right Arrow will jump the cursor forward a whole word at a time;
- Ctrl+Left Arrow will jump the cursor backwards a whole word at a time;
- Ctrl+Down Arrow will jump you down a whole paragraph at a time;

- Ctrl+Up Arrow will jump you up a whole paragraph at a time. If you want to select or block a larger portion of text, add the Shift key to the above combinations:
- Ctrl+Shift+Right Arrow will jump the cursor forward a whole word and select the text at the same time;
- Ctrl+Shift+Left Arrow will jump the cursor backwards a whole word and select the text at the same time;
- Ctrl+Shift+Down Arrow will jump you down a whole paragraph and select the text at the same time;
- Ctrl+Shift+Up Arrow will jump you up a whole paragraph and select the text at the same time. After blocking the words, sentences or paragraphs you wanted to select, you can copy, move, or reformat as you wish.

Text formatting shortcuts

Few things are more finicky than typing case citations. With these three keyboard shortcuts case typing citations will be a breeze:

- Press Ctrl+B to turn Bold on/off
- Press Ctrl+I to turn Italics on/off
- Press Ctrl+U to turn underline on/off

Two things to note, you can use these shortcuts together, and they are all toggles, that is, pressing the noted key combination cycles between on and off. If you want to type a case name in the middle of a sentence with bold and underline do the following: When you get to the point the case name starts, simply press Ctrl+B, then Ctrl+I, then type the case name. To turn bold and underline off, press Ctrl+B and then Ctrl+I again, and continue with the sentence.

The Miraculous Undo

No doubt, from time to time you will find yourself in a place you just don't want to be after a series of edits. To undo changes - including multiple changes - press Ctrl+Z, Alt+Backspace, or click the Undo button. You can do this multiple times.

And there is more – you can redo undone changes (including multiple changes again) by clicking on the Redo button, or by pressing Ctrl+Y, one or more times.

Undo works in all the MS Office applications, and many other programs as well.

Grab text with F8

If you need to select an entire sentence in Word, hit F8 three times in quick succession. Nothing will grab an entire sentence faster.

Pressing F8 a fourth time will select the entire current paragraph; and pressing it a fifth time will select the entire document.

Pressing Ctrl+A is a simpler way to select the entire document.

These F8 shortcuts do not work in WordPerfect , The Ctrl+A to select the entire document does.

In WordPerfect, you can use a mouse to select text by word, sentence, and paragraph and entire document by right clicking in the left margin and selecting your choice.

As an alternative, in WordPerfect you can use a mouse to select text by word, sentence or paragraph, respectively, by double-clicking, triple-clicking, or quadruple-clicking with your left mouse button anywhere within the text you want to select.

In Word you can use a mouse to select text by word and paragraph by respectively by double-clicking and triple-clicking with your left mouse button anywhere within the text you want to select.

Keep your text on one line

Every once and awhile you need to keep related text from splitting awkwardly at the end of a line. A common example of this keeping phone numbers and their area codes together on the same line.

The trick is putting in a special kind of space so your word processor will recognize that it is not start a new line. If you are a WordPerfect user this special space is called a "hard space". If you are a Word user it is called a "nonbreaking space".

Word Perfect users must press Ctrl+Spacebar to enter a hard space after the area code (to use the telephone number example). Visually, this inserts a space at the proper point, but it is in fact a hard space. WordPerfect interprets a hard space as a text character and keeps the entire string together.

Word users must press Ctrl+Shift+Spacebar to enter a nonbreaking space. Again visually it appears the same, but is treated differently if that space ends up at the end of a line.

Dodging Bullets

Both Word and WordPerfect allow you to automatically number or bullet a list of items. That is, each time you hit enter you get a new number or bullet. Just click on the Numbered List or Bullet buttons to start such a list.

Sometimes you find yourself wanting to enter an unnumbered item within a numbered item list, or two points under the same bullet.

To do this simply press Shift+Enter instead of just Enter. Shift+Enter is recognized as a line break and not a paragraph break, and it won't insert a new automatic number or bullet. When you want to move on to your next numbered item or bullet, just press Enter as you would normally.

Text Selection Made Easy

In certain situations selecting passages of text precisely with the mouse can be difficult. Probably the best examples of these situations are when you are working with information in a tightly packed table, or trying to select a large piece of a very long document or Web page.

Here is a handy trick to help you select text in these situations. First you must place the insertion point where you want the selection to start. Do this with a single left click of your mouse in this exact location.

Next, you need to get to the screen that displays the end of the passage you want. Use your scroll bars or other appropriate keys to move to where you want the selection to end. While moving to the end point be careful not to click anywhere in the document you are working with as this will move the initial insertion point.

When you get to the screen that displays the end point, while holding down your Shift key, do a single left click of your mouse in this exact location. All text in between the two insertion points will be selected. You can cut or copy the selected passage as you desire. This trick should work in most Windows applications.

Follow the Leaders

Leaders are the dots or dashes that stretch from one section of text to another. They are most commonly used in table of contents. For example:

Chapter 1.....Introduction
Chapter 2.....Background

You can create leaders manually by pressing the period button repeatedly. However, if you do this you will find that not all items in the list will line up properly. The result will be sloppy and unprofessional looking.

The solution is to use the Leaders feature when setting tab stops. Leaders are really tabs with a twist. Both Word and WordPerfect have this feature.

Word users should follow these steps: When you're ready to enter a list that contains leaders choose Format, and then select Tabs to open the Tabs dialog box. Set the first tab stop where the left side of your list will be positioned, and the second where your right side will be positioned. Then click the button under Leader that corresponds to the kind of leader line you like and click

OK. You can now type your table of contents. Press tab to insert a leader between the items on the left and right.

WordPerfect users are presented with a slightly different set of options that accomplish the same thing. They should select Format, then Tab Set. This opens the Tab Set dialog box. Within this box you will find all the same options in terms of type of leader, the leader character etc.

In both Word and WordPerfect working with tabs and leaders is easier if you have your rulers turned on. In both Word and WordPerfect select View, and click on Ruler to turn them on. You can move tabs that appear on the ruler by dragging and dropping them. Double clicking individual tab marks will open the dialog box so you can change its settings. You can delete a tab by dragging it off the ruler.

Once you are done your table of contents, you can easily set your tabs back to the default setting by selecting this option in the Tabs or Tab Set dialog box.

Easy Instant Lines

In Word you can easily create a variety of horizontal lines by typing the following characters three times, followed by Return or Enter:

- * Minus (-) produces a thin line;
- * Underscore (_) produces a thicker line;
- * Equal sign (=) produces a double line;
- * Asterisk (*) produces a thick dotted line;
- * Tilde (~) produces a zigzag line;
- * Number (#) produces three lines, a thicker middle line between two thin lines.

The lines will be the width of your page, or if you are using columns, the width of your column. In WordPerfect the first three shortcuts work in all versions after and including Version 7.

Excel

For crunching numbers and manipulating textual data, there are few if any tools better than spreadsheets. Are you making maximum use of this most amazing tool?

Spreadsheets started out as a tool for doing mathematical calculations – and they excel at this task. They give you instant results, even when you change just one figure in a very complex formula or calculation.

You should consider using a spreadsheet anytime you have to do numerical or financial calculations. Use them to calculate damages in litigation matters (including pre- and post-

judgment interest), payments on a lease agreement, personal or work related budgets and so on. They are great if you need to compare two or more scenarios.

But don't just think about numbers – spreadsheets can also search, sort, and filter textual information. Everything from lists of documents, dates, events and more. I like using them for brainstorming and outlining.

Odds are Excel or another spreadsheet is already on your desktop. To help you make the most of this amazing tool, this month I will review some of my favorite Excel tips and tricks, many of which will work in other spreadsheet programs.

Some key Excel tips are highlighted in the following text. See also the Excel at Excel chart included in the materials for this session.

Try a right click

Yes this is a repeat - but it is worth repeating. A right click on just about any item on your Excel screen will present you with a list of options of the things you most likely want to do to that item. Right click on a cell to change formats, on a column heading to change column width, and so on. Hitting Shift+F10 or the Windows Menu key is the same as a right click. Once you start right clicking, you won't stop.

Cryptic Error Messages

Inevitably you will enter something in a cell that does not compute, and Excel will give you a cryptic error message. Here is what they mean:

- #####: value is too long to display (To automatically adjust width of column to widest cell double click on column heading divider)
- #VALUE: the wrong type of argument or operand has been used
- #DIV/0!: a formula divides by 0
- #NAME?: Excel doesn't recognize text in a formula.
- #N/A: a value is not available to a function or a formula
- #REF!: a cell reference is not valid
- #NUM!: a problem has occurred with a number in a formula or function

Worksheet Tabs

Make it easier to find your work by renaming your worksheet tabs from the default Sheet1, Sheet2 etc. To do this, double-click on a tab; or right-click on it and select Rename. To reorder worksheets, drag and drop individual tabs to the right or left. To insert, delete, move, copy or hide sheets, right-click on a tab, and select the option you want.

Worksheet Navigation Shortcuts

To jump to upper left corner of worksheet (cell A1) press Ctrl+Home. To jump back to active cell (remember that scrolling doesn't move active cell), press Ctrl+Backspace

Multi-lined Cells

If you are working with textual information you will want to have mutli-lined cells. To do this, press Alt+Enter at the point you want to start a new line. This shortcut lets you control where the line break occurs, and does the same thing as clicking on Format, Cell, Alignment, and checking the Wrap text checkbox.

Formulas

Formulas can be confusing when you can't easily see and compare them. To see all formulas at once, press Ctrl+' . Toggle back to displaying values by pressing Ctrl+' again. To enter a formula result in a cell for later reference go to cell below and press Ctrl+Shift+' . To enter exact formula in a cell for later reference go to cell below and press Ctrl+'.

Formatting Printouts

Getting useful printouts of spreadsheets can be tricky because they can be very large. To address this Excel gives you a couple of ways to change printout formats. To easily change where page breaks occur , click on View, Page Break Preview, and then drag and drop page the dotted page breaks. To make dozens of other changes in format of printed output, click on the Print Preview button; or select File, Print Preview. You will find yourself using these two tips almost every time you want to print something.

Changing Excel Default Options

Software programs don't always do things exactly the way you want them to. Needless to say, this can be downright frustrating. Fortunately, in some cases, your frustrations can be reduced by changing a few default settings.

As is the case fore most Microsoft programs, clicking on Tools, then Options gives you access to the majority of the Excel default settings you can play with. In the Options dialog box there are 13 tabs with various settings you can tweak. I will focus on what I think the most practical and useful changes are.

View tab

The settings on the View tab control how things are displayed on the worksheet screen. In the Show section select or clear options under to display or hide the formula bar (useful), status bar (useful) and startup task pane (probably an annoyance for most of you). Clicking Windows in Taskbar will force Excel to display multiple workbooks as separate buttons on the Windows taskbar.

The options under Objects allow you to display or hide graphic objects in the workbook. Show all is the default and displays everything. Show placeholders displays pictures and charts as gray rectangles. Displaying object placeholders can significantly increase the speed of scrolling through a sheet. Hide all hides all graphic objects and is useful when you want to view or print a worksheet without graphical items.

In the Windows options section you set the display options for the active window. I sometimes find are useful to turn off gridlines, and turn on page breaks and formulas.

Edit tab

All sorts of useful things on the Edit tab to control the options for editing worksheet data. Any options checked in this tab affect all worksheets in the workbook.

The most useful one here is Move selection after Enter. This controls which adjacent cell you jump to after you press ENTER in the current active cell. The default is Down. You can also set it to Right, Left and Up.

Edit directly in cell lets you make edits right inside a cell by double-clicking it. This is faster than editing the cell contents only in the formula bar.

Allow cell drag and drop lets you move and copy cells and data by dragging them around the sheet. This is helpful in some situations, but can be dangerous unless you also enable the Alert before overwriting cells option. It displays a message if you drop cells over other cells that contain data.

Now for two “oh that’s why that happens” settings. With Enable AutoComplete for cell values enabled, if the first few letters you type match an existing entry in that column, Excel fills in the remaining text for you. When Enable automatic percent entry is enabled all numbers less than 1 will be multiplied by 100 when they are entered in cells formatted in the Percentage format. These are often helpful, but it’s nice to be able to turn them off when they aren’t.

General tab

In the Settings section you specify display, viewing, and opening settings for your workbook.

Enable Function tooltips to displays brief descriptions of the names of buttons and boxes on toolbars. A ToolTip is displayed when the mouse pointer rests on the button. These are real helpful.

Recently used file list displays a list of recently used files at the bottom of the File menu. This lets you very quickly access your recent work. The default is three, the max is nine. You can also set it to zero to hide your tracks.

Provide feedback with sound plays various sounds that are associated with Microsoft Office program events, such as opening, saving, and printing files, and displaying error messages. Normally I am not a fan of extra sounds and animation (because it often slows your computer down), but I find the extra audible feedback is helpful to confirm things are happening as I want them to and to warn me when they are not. Note that this setting affects all other Microsoft Office programs. Sounds assigned to different events can be changed in the Sounds Properties dialog box in Windows Control Panel.

Sheets in new workbook sets the number of worksheets you want when you create a new workbook. The default is 3.

Standard font controls the default font (and its size) for new sheets and workbooks.

Custom Lists

The Custom Lists tab has gotten me hugs and kisses following some of the Excel presentations I have done. Excel uses custom lists to create a list of entries in sequential cells when you drag and drop the fill handle (a little black square in the lower right corner of a cell) in any cell containing an entry from a custom list. By default Excel has custom lists for the days of the week and months of the year in full words and shortforms.

The real power is that you can add custom lists for anything you want. I find lawyers tend to like this for creating custom ID numbers for documents in a document brief or for a deposition. You can import a custom list from a worksheet. One trick to remember, the first character in a custom list item can't be a number.

Color tab

Under the color tab you find the standard colors Excel uses. More importantly, for those that may want to tweak which colors Excel uses on charts and graph lines, the Chart fills specifies the first eight colors Microsoft Excel uses for chart fills, and Chart lines specifies the first eight colors Excel uses for chart lines. Click on the Modify button to create custom colors, and the Reset button to the color palette to the original colors.

The Copy colors from copies a color palette to the active workbook from another currently open workbook.

International tab

Under the Number handling section you can change the decimal and thousands separators from the default Windows separators.

Save tab

The Save AutoRecover info every automatically makes a workbook recovery file at the interval you enter in the Minutes box (a number from 1 to 120). If your computer crashes, Excel automatically opens the AutoRecover file the next time you start Excel. It may contain edits that would otherwise be lost from your original workbook. AutoRecover does not replace the Save command—you must still save your workbook when you finish working on it. If you just hit Ctrl+S every few minutes you will never have to rely on Autorecover.

Spelling tab

Although you are likely mostly dealing with numbers in a spreadsheet, remember that Excel has the same spell checking functionality that Word has (click on Tools, then Spelling and grammar or hit Shift+F7). On this tab you can control the Dictionary language for the worksheet, and which custom dictionary is used for extra words.

Security tab

The Password to open option allows you to set a password to prevent others from opening a workbook unless they have the specified password. This is handy if you want an extra level of privacy when sending a spreadsheet as an attachment to an e-mail message.

There you have it, a bunch of ways to make Excel work more they way you want it to. I have only reviewed some of the setting changes you can make in the Options dialog box. I encourage you to review the others to see if there is something that would be helpful for you.

PowerPoint

You should make sure you are very comfortable with the basics of navigating PowerPoint when you are doing a presentation. It looks unprofessional when someone gets up in front of an audience, gets part way through their presentation, and then has difficulties changing slides.

Jumping one slide at a time

My favorite key for jumping to the next slide is the Space Bar. Of course, the PageDown, Enter, N key (for Next) and down or right arrows to do the same thing. However, the Space Bar is a much larger target that is so much easier to hit if you are nervous or your hands are shaking. Have you ever seen a presenter that accidentally jumped ahead a slide and couldn't go backwards? Ouch!

To jump back to the previous slide, try the Backspace key. It is bigger than the PageUp, P key (for Previous) and the up or left arrows, which accomplish the same thing.

Jumping multiple slides

One of the most common criticisms about PowerPoint is that it forces you to do linear presentations – a series of slides, one slide after another, in a preset and fixed order. Of course, topics don't always go in the exact order you planned, especially if you get a question from the audience that takes you to a non-adjacent slide in your presentation.

And remember, pressing PageUp twenty-two times to get to the slide you want is just not cool. To easily (and invisibly to your audience) jump to any slide in your presentation, press the Alt key, then the numerical digit(s) that represent the number of a specific slide, and then hit Enter. The desired slide will instantly appear on the screen. Now that's cool!

Memorize the numbers of the key slides in your presentation, or have a list in front of you. This will allow you to jump to any slide to respond to a question or make a point.

Now, what happens if you don't know the number of the slide you want to go to? A simple "right click" on your mouse presents you with a menu with a number of options. The one of interest here is Go to Slide. Move the cursor over this menu item and bingo, up pops a numbered listing of the titles for every slide in your presentation. Click on the desired slide and you will jump directly to it.

The "eject" button

If for some reason you don't get through all your slides (an unforgivable sin that I will no doubt address in more detail in a future tips and tricks column) and the moderator is about to give you the hook, you need to make a quick and graceful exit. If the last slide in your presentation is your conclusion, simply hit the End to jump to it.

In similar fashion, pressing the Home key will instantly jump you to the very first slide in your presentation. This can be handy if you want to refer to a summary or outline of points on the first slide.

A blank screen

Of course, as an audience is sitting there watching your presentation, their attention will largely be on the screen. One really powerful way to pull the attention back to yourself is to press "B" or "W" respectively to turn the screen to black or white. That blanks the screen out and the of course the audience will then focus on you, and at that point you can either emphasize or walk them through something that is particularly important or that you particularly want to give a high emphasis to. Simply pressing the "B" or the "W" again will take you back to the presentation

Avoiding common PowerPoint technical glitches

Few things scare presenters more than a technology problem. Luckily some of the most common technical snafus are easily avoided with a bit of homework and preparation.

Avoiding a blackout

Have you ever seen a screen go blank in the middle of a presentation? To extend battery life, most laptops have power management features. These features will shut down a screen or even the whole computer, after a certain period of inactivity. This is helpful when you are on a long flight, but not something you want in the middle of your presentation.

All power management features should be all turned off or disabled prior to your presentation. To do this, click on Start, select Control Panel, and click on Power Options. Under Power Schemes, select Always On.

But I can't see my screen

The next glitch frustrates a lot of people, and it's actually very easy to fix. Have you ever had the screen on your laptop go blank after plugging a projector into it?

Plugging a projector into your laptop is essentially the same as plugging in a monitor. The computer does not distinguish between the two. It thinks a monitor is attached to the laptop, and assumes you want to look at that monitor, so it turns the screen on the laptop off.

As I mentioned above, it is preferable to have slides appear on both on the laptop and through the projector to the screen the audience is viewing. The trick is tuning both on.

If you look closely at the function keys on your computer, you will see some with markings on them (other than the F1, F2, F3 etc.). They are often in a color that is different from the marking on other keys. One of these markings will be little square or rectangle representing a monitor. By pressing the Control key, or another key on your keyboard (look for markings in similar color) and this monitor key, you can to turn the laptop screen and projected image on and off. It is actually a three-way toggle on most computers. That is, it will switch between having the laptop screen on, the projected image one, on having both on simultaneously. Repeatedly hit the keys to cycle through and get both the laptop screen and the projected image on. You may have to wait a few seconds each time you press to let the images appear.

Outlook

Essential Microsoft Outlook keyboard shortcuts

These five general tips will help you move around and work with items more quickly within Outlook:

1. Learn keyboard shortcuts for completing the more common tasks. The essential Outlook keyboard shortcuts include:

- Ctrl+Shift+M to create a new message
- Ctrl+Enter to send a message
- Ctrl+Shift+I to jump to the Inbox
- Ctrl+Shift+B to jump to the address book
- Ctrl+Shift+K to create a new task
- Ctrl+Shift+N to create a new note

(If you are not familiar with the syntax for describing keyboard shortcuts, simply remember that a plus sign (+) between two keys means that you press the listed keys, almost simultaneously, moving from left to right. For example, a capital B would be described as Shift+B.)

Use plain English dates

Outlook understands plain English entries in date fields, and will enter the next occurrence of the described date. For example: typing “tomorrow” will enter tomorrow’s date, “nov 4” will enter the next occurrence of this date, “one week” will enter the date one week from today, and “2 days” will enter a date two days from the current date.

Drag and drop items of one type to create another

For example, dragging an e-mail message to the taskbar Calendar icon will open a new appointment. Information from the original item will automatically be transferred to the new item so you do not have to retype it.

Use a “right click” for format and configuration settings.

In Outlook many options or features available with a simple right mouse click, including formatting and configuration settings. These options and features are “context sensitive” – in other words, you will be presented with a list of choices that are relevant to the item, field or text you are right clicking on. For example, right clicking on an e-mail in your Inbox presents you with Open, Print, Reply, Reply all, Forward etc. Right clicking on a blank spot on your calendar will let you create new appointments, and configure the calendar. You can right click on almost everything - try it!

Sort items to quickly find the information you want.

In all views you can sort items listed in a column with a click on column title bars. Clicking a column heading a second time will reverse the order. This sort feature works the same on column style information in all Microsoft Office applications.

Eliminate your biggest daily interruption: Banish the new e-mail pop-up

Many people are presented with a beep and the “new message” pop-up window every single time a new e-mail message arrives in their Inbox. This is a huge interruption. Your train of thought gets interrupted and you get bounced out of whatever you were working on. To get more done, turn off that notification window! Go with just the beep if you have to. And, if you don’t need to know the instant when something arrives in your inbox (and most of the time you don’t), consider turning off the beep too. You’re going to check your inbox reasonably regularly anyway.

Your e-mail signature: More than meets the eye

Ah, the humble e-mail signature – that simple block of text that (hopefully) appears at the end of your e-mail messages. It is easy not to think much about it – but do so at your peril.

No doubt, you send out hundreds or even thousands of e-mails over the course of a year. These messages are read by existing and prospective clients, opposing counsel, experts or third parties, friends and family.

When sending all these e-mails, you should keep in mind three things: (1) many (but not all) of your messages should contain full contact information for you (just as your letterhead does), (2) other appropriate information (notices and disclaimers etc). Thirdly, each message you send offers a great opportunity to market you or your firm in some manner.

Is your e-mail signature doing everything it can for you? Can you do more with it? Read on to understand how to supercharge your e-mail signature.

What is an e-mail signature?

Most e-mail programs can automatically add a specific block of text to the end of every outgoing e-mail message – this is the so-called e-mail signature feature.

After you have created a signature, it will appear automatically in every new e-mail message that you create – provided you configure your e-mail program to include a default signature. You can manually insert signatures as well – see below for more on this.

In Microsoft Outlook (the steps in other programs will be similar) you create a signature by clicking on Tools, selecting Options, clicking on the Mail Format tab, and then on the Signature button. This will open the Create Signature dialog box – this is where you enter the text that will appear in a signature, and set other signature configuration options.

A sample e-mail signature appears in the sidebar to this column,

Dan

+ - + - + - + - + - + - + - + - + - + - + - + - + - + - + - + - + - +
Dan Pinnington *dan.pinnington@lawpro.ca*
Director, practicePRO
Lawyers' Professional Indemnity Company (LAWPRO)
(416) 598-5863 or 1 (800) 410-1013
(Fax) 416 599 8341
www.practicepro.ca and www.lawpro.ca

*On our LAWPRO Magazine Archives page, every
article from every past issue is just one click away.
See them at www.lawpro.ca/magazinearchives*

Let's walk-through an explanation of the contents. Your signature should contain full contact info, including:

- Your full name;
- Title or status at your firm (Partner, Associate etc.);
- Firm name;
- Phone number - including area code!
- If you list a toll-free number that doesn't work outside your state or the US, list a direct dial number too;
- Fax numbers, if appropriate your practice;
- Include your e-mail address – remember that the address in the Sent box won't always display properly on screen or in printouts, so having it right in the message can be very helpful;
- Your firm website URL; and
- Any other relevant contact information (name of assistant).

I don't put a street address in an e-mail signature as people I send messages to would only rarely want my address – but depending on the nature of your practice, it may make to include your address.

Signature Format

Remember to add three or four blank lines to the start of your signature so that you have a blank space at the start to type your message contents. This will save you having to bump your signature down a few lines in every new message you open. I also include “Dan” at the top of my signature so I don’t have to type my name at the end of every message.

To make your signature stand out more, start it with a divider line of one or more types of characters. You can also put a divider at the start of the marketing portion of the signature. To make the signature stand out and look more presentable, I make all my dividers the same length and keep all text in the signature within the dividers so that it appears in a box-like shape.

Other content

You can also use a signature to add a confidentiality notice, the IRS notice or any other content you want in every message you send. And note, if you want something to appear before the content in your message, you can still use the signature feature to place the text into each new message - you will just jump down a few lines to type the message contents.

Include marketing info

After your contact info, include a little blurb that markets you in some way. It could refer to an upcoming presentation that you are doing, or a helpful article that appears on your Web site – and to make it dead easy to get more info or a copy of the article, include a direct link in the message. This is the easiest and cheapest direct marketing you will ever do! Don’t include more than one or two marketing items as people just won’t read all of them. Instead, to keep things fresh, remember to change or rotate your marketing message every month or two.

E-mail form letters

Outlook, and many other email programs, actually allow you to create more than one signature – this is helpful if you have different signatures that you want to include on different messages. Maybe you set a default signature if you use the same one the majority of the time, or maybe you manually pick one on each message if you use a number of signatures.

But don’t stop there: Do you have one or more blocks of text that you frequently include in your messages? Consider saving the text for these as signatures. Then, the next time you want to include one or more of these text snippets in your message, place the cursor where you want to text to appear and insert the signature that contains the text you want. It is just like using a macro or autotext feature within an e-mail. Cool!

vCards

So what is that little contact card icon you sometimes see at the end of e-mails you get? It is a

vCard. A vCard is a standard file format (.vcf) that facilitates the easy exchange of contact information – consider it an electronic business card you attach to your e-mail message. vCards can contain name and address information, phone numbers, URLs, logos, photographs, and even audio clips.

In Outlook and many other e-mail programs, you can instantly add all the info in a vCard into your Address book by simply double-clicking on the .vcf attachment. If you want to make it easy for people to add you to their contact list, specific that a vCard be included in your email signature when you create and configure it.

No signature required

Do you need a full signature on every message you send? Absolutely not! Internal or informal messages and those to friends or family don't need one. So how do you quickly get rid of a default signature? As soon as you click within the body of your message, press Ctrl+A, and just start typing. This selects all the text in the message, and deletes it.

Hmmm. Didn't think there was that much to think about when it came to e-mail signatures, did you? Go take a look at your signature now, and take steps to do more with it.