

# AMICUS

MARCH 2010

## MICROSOFT WORD 2007 FOR LAWYERS (AND PARALEGALS!)

Document automation is important to lawyers, especially as alternative billing continues to gain momentum, pushing law firms toward greater and greater efficiencies. When you bill by the hour, there isn't much incentive to do things quickly, but when you're doing alternative billing, being able to produce work quickly is important to profitability.

Lawyers often re-use documents to gain this advantage. Mr. Smith's will was brilliant, so when Mrs. Jones calls for a will, you take Mr. Smith's will, change a few key bits of information, and save it. But if you're not careful you might inadvertently save Mrs. Jones' will over Mr. Smith's will, thus wiping his out. And there is a risk that you could expose some of Mr. Smith's information, either via oversight or metadata, to Mrs. Jones or to others.

Time savers are important, but you can't sacrifice quality. Automating processes can help firms achieve greater profitability, and maintain quality, if done correctly. Word provides several tools to help overcome these problems.

One is templates. If you have a document you're really proud of—Mr. Smith's will, in this case—take a few minutes to create a template that is based on that document. Then when Mrs. Jones calls, you can base her will on that template, rather than on Mr. Smith's will. The template is a separate document, so you don't risk overwriting Mr. Smith's will. Moreover, you can clean the template of sensitive data and metadata so that you can be more confident that you are not breaching Mr. Smith's confidence in any way.

Another useful tool is "Building Blocks." In earlier versions of Word, this was called "AutoText," and it was a great way to create shortcuts for boilerplate text—sentences, whole paragraphs and even pages of text that you use repeatedly.

With Building Blocks, when you get to a place in your document where you'd like to insert some standardized text, you can type just a few unique characters, press a key and Word will automatically insert that boilerplate text for you, saving you quite a bit of time and the hassle of cutting and pasting from another document. And, by using Building Blocks you can be assured that the text will be spelled and phrased the same way every time—reducing the risk of quality problems.

The basic tool that is most useful for creating legal-specific documents is a Word template—not only templates that you create, but also ones for legal documents that you might obtain from other sources including colleagues and companies that create such templates professionally.

Word also provides tools of specific interest to lawyers and legal staff, such as "Compare Documents," commonly referred to as "red-lining;" Styles; the Office clipboard, which can clip and store up to 24 separate items; and the capability to produce some really advanced tables.

Attorneys can also embed financial or statistical data from Excel spreadsheets into Word.

Line numbering has long been a staple of legal documents and Word 2007 handles that with aplomb. Headers, footers, footnotes, watermarks and even tables of contents, citations and tables of authorities can all be generated easily within Word 2007.

Word metadata gets a lot of bad press because of the sensitive information it can sometimes expose, but when it comes to going paperless—or at least "less paper"—metadata is essential. Word lets you assign keywords, tags and other information to make a document easier to find and organize. In Word 2007, you can find a lot of this metadata on the "Document Informa-

tion Panel" that you can access by clicking the Office button, then going to "Prepare," and then "Properties."

Another great new feature in Office 2007 is the ability to create PDF files from Office documents in nearly one step. Click the Office button, choose "Save As" and then select PDF, and the Office program you're using saves your document as a PDF file.

I say "nearly one step" because it is not installed in Office 2007 by default for legal reasons. It's free and easy to get, however. If you do not have it installed, when you try to access the feature, Word will offer to connect to Microsoft.com to download and install the add-in for you. Did I mention it's free? It's not really a replacement for Acrobat Pro, as it won't do a lot of the complex PDF documents that Acrobat Pro can do, but for creating basic PDF files, it's great.

You should never send Word documents to anybody who does not need to edit them. If you want to send a document to somebody, convert it to a PDF first, using Acrobat or the built-in tool discussed moments ago. A PDF file carries far less potentially damaging metadata and you do not have to worry about whether the other party can read your document.

That said, if you have to send a Word document because the other party does need to edit it, then most obvious step is to use Word's built-in metadata cleaning tool. Click the Office Button, then hit "Prepare" and start the metadata inspector. This built-in metadata cleaner is good, but you might also consider getting a third party tool

Edited & excerpted from: Ben M. Schorr, *Word wise: Microsoft® Word 2007 for lawyers*, ABA January 2010 Newsletter retrieved from: <http://www.abanet.org/media/youraba/201001/article01.html> (click on link for complete article). Thank you, Diane Tally, for suggesting that this information is pertinent for paralegals as well as lawyers!



IT IS ALMOST  
TIME!!

2010

ANNUAL  
MEETING  
&  
SEMINAR

Holiday Inn  
Sunspreet Resort

WRIGHTSVILLE  
BEACH

MARCH 18-20

For more information:

Contact: Stephanie Elliott-Park

Email: [education@ncparalegal.org](mailto:education@ncparalegal.org)  
Or

Check out our website at  
[www.ncparalegal.org](http://www.ncparalegal.org)

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## DISTRICT 1—DIANE MORGAN, ACP, NCCP



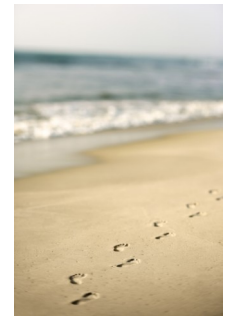
LET'S MEET AT THE BEACH IN 2010!

**LAST CALL FOR ALL DISTRICT 1 MEMBERS TO TRY TO ATTEND THE 2010 ANNUAL MEETING & SEMINAR** which will be held in our district at the **WRIGHTSVILLE BEACH HOLIDAY INN—**

**SUNSPREE RESORT!!**

What a great opportunity for District I to get together for fellowship and support of our organization!

**Please email me at [dmorgan@nhc.gov](mailto:dmorgan@nhc.gov) with any suggestions for a Meet & Greet at Annual**



## DISTRICT III —SYLVIA ERICKSON, NCCP

**Mother, mother ocean**

**I have heard you call**

**Wanted to sail upon your waters**

**Since I was three feet tall**

**You've seen it all, you've seen it all**

-Jimmy Buffett

(A Pirate Looks at 40)

**It's time to go to the beach!!!**

District III is looking forward to seeing everyone at NCPA's 30<sup>th</sup> Annual Meeting & Seminar at the Holiday Inn Resort in Wrightsville Beach, North Carolina on March 18, 19 and 20, 2010. Plan to stop by and say hello during District III's meet and greet on Friday, March 19, 2010 during our lunch break on the patio. District III covers Bladen, Columbus, Cumberland, Duplin, Harnett, Hoke, Lee, Moore, Richmond, Robeson, Sampson and Scotland County and currently has 32 members.

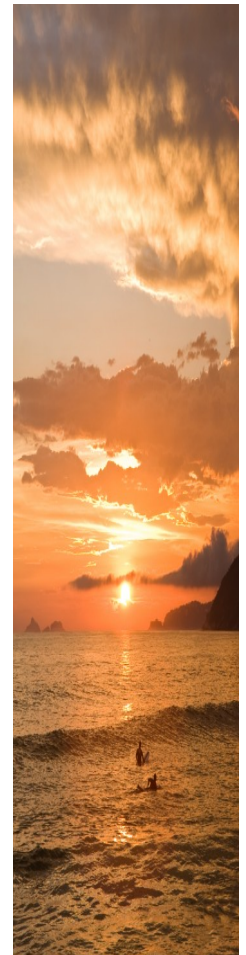
The Cumberland County Paralegal Association (CCPA) will hold a bake sale on March 29, 2010 from 8:00 a.m. to 1:00 p.m. at the Cumberland County Courthouse. CCPA's annual seminar is scheduled for Saturday, April 17, 2010 from 8:00 a.m. to 5:00 p.m. at Methodist University. CCPA's next monthly meeting is scheduled for Thursday, March 11, 2010 at 1:00 p.m. at Deno's Pizza Palace located at 407 N. Eastern Boulevard in Fayetteville.

See you at the beach!

Sylvia L. Erickson, NCCP District III Director

(910) 484-0179

[sylvia\\_erickson@fd.org](mailto:sylvia_erickson@fd.org)



DISTRICT IV —KAREN ENGLAND, NCCP

**DISTRICT IV NEWS**

--News around the District Guilford Paralegal Association (GPA) held its January 12 meeting at Elon Law School in Greensboro. Nancy Short Ferguson spoke to members on the Unauthorized Practice of Law. On February 9, 2009, GPA held its month meeting at Wyatt Early Harris Wheeler in High Point. This was a brainstorming meeting to discuss long-term goals and planning for the future of GPA. Many good ideas were shared by those members present.

GPA will hold its 4<sup>th</sup> Annual Spring Seminar on Saturday, May 1, 2010, at the Doubletree Hotel in Greensboro, NC. The seminar has been approved for 6 CPE credit hours – 5 general and 1 ethics. Details about the seminar, monthly meetings and all of GPA’s events are available on the website. <http://www.guilfordparalegalassociation.org/>.

Alamance County Paralegal Association (ACPA), an NCPA affiliate, hosted a 3 hour seminar on Saturday, February 20, 2010. Lawson Brown spoke to those in attendance on the subject of Ethics; Kimberly Hamilton spoke on private process serving; and Judge

Roberson spoke on matters of the Court.

For information on ACPA please contact Hattie Sheets at [hss@vernonlaw.com](mailto:hss@vernonlaw.com) or Teresa Stacey at [tas@vernonlaw.com](mailto:tas@vernonlaw.com).

It has been a pleasure to serve as District IV Director this year. If you have suggestions for our district or if I can be of assistance to any of you, please do not hesitate to contact me at [kengland@wehwlaw.com](mailto:kengland@wehwlaw.com).

Karen F. England, NCCP  
District IV Director



*For whatever we lose (like a you or a me) it's always ourselves we find in the sea.*  
- e.e. cummings

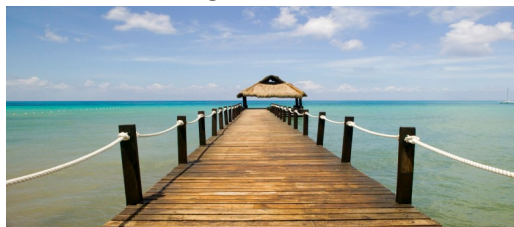
DISTRICT VII– STEPHANIE IVANS, NCCP

District VII had a meeting at Papas & Beer in Asheville on Tuesday February 9, 2010 at 6 p.m. We had 6 in attendance. Attorney Susan Russo was our speaker and her topic was Hot Practice Areas for Paralegals and New Trends in the Law. I am planning another meeting for our area to be held in Sylva.

I will be e-mailing the details to members in the near future. I also plan to post the info on the NCPA website. Please make a note to District VII members that I will be attending the Annual Seminar and Meeting and

I would be glad to be a proxy for those who cannot attend this year (I have already received some).

Stephanie Ivans, NCCP



### DISTRICT VIII—BETH FALGOUT, NCCP

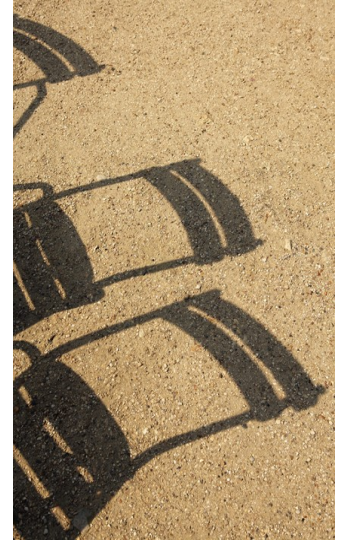


District VIII members,

I look forward to seeing you at Annual in Wrightsville Beach.

Send me an email if you will attending and we will schedule a time and place to get together.

Beth Falgout  
Interim Director District VIII  
[bfaigout@invtitle.com](mailto:bfaigout@invtitle.com)



### DISTRICT IX—BEVERLY KING, NCPA

"down by the seashore, where life is a little easier!"

-- Unknown

#### District IX

The Catawba Valley Paralegal Association will have its Pampered Chef fundraiser kickoff on March 9, 2010 at the Catawba Country Club.

There will be a Pampered Chef party on March 23, 2010 at 6:30 p.m. at Wendy Spires home.

For more information please see [www.catawbavalleyparalegalassoc.org](http://www.catawbavalleyparalegalassoc.org) or contact Beverly Moore, NCCP at [bev@tissuelaw.com](mailto:bev@tissuelaw.com).



#### Upcoming CPE Events:

April 13, 2010, 6:00 pm  
CPE @ CVCC Auditorium

Presenter: D. Shawn Clark, Attorney

"The Motley Career"

May 11, 2010

CPE - Blair (Tripp) Cody III, Attorney

CVCC Auditorium

I have really enjoyed serving as District IX Director. Thanks to all District IX Members for your support.

\* \* \* \* \*  
\* Please consider \*  
\* volunteering \*  
\* with \*  
\* NCPA. \*  
\* Many oppor- \*  
\* tunities require \*  
\* only a few \*  
\* hours of your \*  
\* time, some \*  
\* phone calls, or \*  
\* a little \*  
\* research... and \*  
\* if you are ready \*  
\* for more \*  
\* involvement, \*  
\* we can use all \*  
\* you are willing \*  
\* to give. \*  
\* \* \* \* \*

**COMING  
SOON!!**

**2010  
NCPA  
SURVEY**

**STAY  
TUNED  
FOR  
FURTHER  
DETAILS!**

The Sea, once it  
casts its spell,  
holds one in its net  
of wonder  
forever.”

--Jacques Cousteau



**NALA NEWS & DEADLINES: JACQUELINE M. THURMAN, CP, NCCP**

NALA Announces Advanced Paralegal Certification Programs for Personal Injury Paralegals. ACP certification credentials will be awarded in the following practice areas. The practice area course and the PI Core Course may also be taken as advanced continuing education for those not pursuing the ACP credential:

- ACP Automobile Accidents
- ACP Entity Medical Liability
- ACP Individual Medical Liability
- ACP Intentional Torts
- ACP Premises Liability
- ACP Product Liability
- ACP Workers' Compensation
- ACP Wrongful Death

**CP Exam is now Computerized!**

**The Certified Paralegal Examination will transition from paper-and-pencil test to computers for the 2010 September exam.**

**2010 NALA Convention**

Celebrates its 35<sup>th</sup> Anniversary in sunny Jacksonville, FL  
July 14-17, 2010.

The Advanced Institutes will be offered for those working in Elder Law, Veterans Law and with Veterans Administration, and Bankruptcy. Educational tracks include the Essential Skills program, and special sessions for those working in corporate law and litigation.

Hot Topics program includes updates on foreclosures, energy law and employment law.

**For further information check out NALA web site or contact Jacqueline M. Thurman, NALA Liaison at [jaqueline.thurman@yahoo.com](mailto:jaqueline.thurman@yahoo.com).**