

## Configuring WordPerfect/Word

Configuring your word processor starts with installing it. You almost always want to use a Custom installation in order to get rid of things you don't want or add things you do need but are not installed by default. Word, for example, no longer installs Word Perfect converters by default. So if you use WordPerfect and recipients complain that they "can't open" your files it is because that option was not installed. In WordPerfect, you may want to add the DAD bar, which puts icons for the WordPerfect programs in your system tray. This article will focus mainly on WordPerfect, since our Newsletter 22, devoted to "Configuring Word and Outlook 2002," is available at [www.heckmanco.com](http://www.heckmanco.com). Many firms use both programs, so it is important to be able to configure both of them.

When you open WordPerfect 12 for the first time you will notice an option to work in Microsoft Word mode. This merely converts the WP format to Word, it does *not* create native Word documents, and the main thing it does is to switch to Word commands and disable WordPerfect functionality that is not available in Word. Choosing WordPerfect Legal Mode puts an extra button bar in your program with some legal-specific options (which are otherwise available through the menu).

### Heckman Consulting

Heckman Consulting is a systems integration firm specializing in the legal market. John Heckman has over 20 years experience in the legal community. For back issues of this newsletter, go to [www.heckmanco.com](http://www.heckmanco.com). After seven years in Connecticut, we relocated to the New York metropolitan area in 2004. You can now contact us at:

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### File Location

Once you have the program installed, you have to decide where to put your files. The defaults imposed by Microsoft are based on individual users, not corporate standards. Documents are by default stored under "My Computer," so they cannot be shared, since only the specific user will be able to access them. The first thing to do is change this setting. Go to Tools | Settings (henceforth referred to as "Settings") | Files. Change the default document location to wherever on your network your files are stored, e.g., g:\docs or g:\data. In Word, this is available under Tools | Options | File Locations.

Next, you need to decide where your templates and macros will reside. Go to Settings | Files and change the default template to "c:\program files\WordPerfect Office 12\template\custom wp templates," and macros to "c:\program files\WordPerfect Office 12\macros\wpwin" (as opposed to the default "Documents and Settings etc." which is different for every user). This makes it easier to maintain firm standards, since all users will reference the same location.

### Settings

There are a variety of adjustments in Settings that you should consider.

- Under Display | Document, set cursor active in text only. This will result in "cleaner" formatting and may avoid problems with some macros.
- Files | Document. You may want to change the auto backup time from 10 minutes to 5 minutes. Then you will never lose more than 5 minutes work in the event of a computer crash.
- Environment. You may want to turn "activate hyperlinks" OFF. Otherwise, they appear on your screen in blue, and print out noticeably grayish.
- Environment | Interface. Make sure Shortcut Keys are enabled. This lists them on the drop-down menu and makes it easier to learn (there is a reason they are called *shortcut* keys).
- Convert. Check the "Do not format using printer metrics" box. Different

printers (even different models from the same manufacturer) may format the same document differently. This will ensure that the document will print the same on all printers.

- Application Bar. You may want to display the date at the bottom of the WordPerfect windows. If you do, you can insert the date in a document by clicking on it.

Note that the way the screen and toolbars display is governed by the options selected under "View." If some items mysteriously "disappear" you can probably get them back by looking at this menu item and changing/re-selecting options. If *everything* disappears, Escape or Alt-V will bring it back.

In Word, similar settings are under Tools | Options. The various tabs are relatively self-evident.

Two of the most critical options to turn off in Word are SmartTags and Track Changes. SmartTags are notorious for being unreliable (randomly changing embedded web addresses for example); more important they provide an open path for viruses and spyware into your system.

Unless used very carefully, Track Changes poses critical metadata issues: if you send the document to opposing counsel, they may be able to see all the edits you have made in the document. If you use Track Changes it is imperative to get a metadata cleanser, such as the one offered by Payne Consulting ([www.payneconsulting.com](http://www.payneconsulting.com)).

### Formatting

Strange formatting behavior is often explained by settings in Tools | QuickCorrect. I suggest setting the following defaults under "Format As You Go":

- Do NOT capitalize next letter after end-of-sentence punctuation. There are too many exceptions (especially in citations).
- Do NOT correct TWo IRregular CAPs. There are so many acronyms these days that this will drive you crazy.
- Do NOT check QuickIndent - Tab works more like Indent. Again, this will drive you nuts.
- If you do a lot of litigation with extensive case citations, you may want to uncheck replacing ordinals with superscript (1<sup>st</sup>).

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## Configuring WP *(Cont.)*

- Normally, you want to leave Smart Quotes turned on—they produce a much better-looking document.

### Default Font

If you want to use a default font other than the ubiquitous Times Roman, simply turn on reveal codes, and at the very top of the document click on “Open Style: Document Style.” Select the desired font and check the “Use as Default” box at the lower right, and all future documents will be created with the new font. Some firms prefer to use Arial or Garamond, Century Schoolbook, Palatino or some other font.

In Word 2003, this is done by editing the “Normal” style. Make sure to have “auto update” OFF, since otherwise you can end up with entire paragraphs bolded, when you only wanted to bold one word.

### Functionality

WordPerfect has two important functions that are lacking in Word: Save to PDF and Document Comparison.

**Save to PDF** is under File | Publish to | PDF. You do not need a separate copy of Acrobat and you do not need to use a clumsy “print to” function to do this. You can massage the parameters of the PDF file that is created if you wish.

**Document Comparison.** Under File | Document | Compare | Compare Only. You can set the “redlining” options under Settings (if you do not have a color printer, select colors carefully as they may not print optimally). Once you have chosen your set-

tings, select the document against which the document on the screen is to be compared, and select Compare Only.

Note that while Word technically has this function, it is so unreliable that Microsoft recommends not using it on legal documents. The Word equivalent is to use Track Changes, but that carries with it the problems associated with metadata.

### QuickCorrect/QuickWords/Autotext

Word’s Autotext function is well-known: you select an item (address or other information) you wish to be able to reproduce, and save it as AutoText. Thereafter, when you start typing, Word offers to complete the entry.

WordPerfect splits this functionality into two parts. QuickCorrect was originally intended to correct common spelling errors on the fly: so if you type “eht” instead of “the,” it is corrected as you type. However, this feature can be expanded significantly. For example, if you create a “quickcorrect” entry of “cgss” you can have it “correct” to “Connecticut General Statutes Section.” In addition, if you type the entry in all caps, the expansion is also all caps. To create a QuickCorrect entry, type the full entry, select it, then go to Tools | QuickCorrect and type in the abbreviation. Do not use an abbreviation you may actually want to type (such as a person’s initials). In this instance, follow it with an “x” or preface it with a non-alpha character (e.g., jfhx or ~jfh).

QuickCorrect expands text that does not contain any formatting (Hard Returns, Tabs, fonts, etc.). Quick Words works the same way, but lets you insert formatting, so

that it can be used for addresses, signature blocks or any boilerplate text. The process of creating a QuickWord is the same: select the entry, go to Tools | QuickWords and type in the abbreviation. When you hit the space bar, the entry expands.

### Usability Features

What WordPerfect terms the “Property Bar” is normally the second button bar. It is context-sensitive, so that different options will appear when you are using different functions (tables, footers, etc.). In normal text, there are two useful functions at the right-hand end of this bar. The first is the normal spell-check box. If the word is misspelled, it appears in red as you type. Clicking on the down arrows gives you suggestions. However, if the word is spelled *correctly*, clicking on the down arrow brings up Thesaurus options, which can be useful in reducing repetitive terminology.

To the left of this box, there is a “snowflake” icon. When you click the down arrow, this gives you the last 16 special symbols you have used: ¶, §, ©, ™, or even a smiley face: ☺. This is a very quick and easy way to insert symbols into your documents.

### Button Bars

You will most likely want to customize button bars. The procedure is the same in both Word and WordPerfect: right-click on the button bar, select “Edit” and add any options you want.

Making the adjustments that best suit your practice will make your computing life both easier and more productive. ■

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