

Legal Office Guru

Assemble Documents Faster

Best Practices for Copying and Re-Using Text from
Prior Documents

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A Little Bit About Me



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- I'm blogger-in-chief at LegalOfficeGuru.com
- I've spent over 20 years working in and around law offices as a legal secretary, paralegal, and software trainer
- I now leverage my law-and-IT background to help lawyers and their staff caught up in "the new legal normal" do things better, faster, and cheaper using the technology tools they already have available

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Before we get started ...

- I'm using Microsoft Word in Office 365 today, so if you're using an earlier version, your display may vary.
- Fortunately, these features haven't changed much.

- I'll also be switching between PowerPoint and live Word documents depending on the context. The embedded videos in PowerPoint allow me to zoom in on details, but the live documents give you a bigger view.

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First ... why learn to recycle text better?

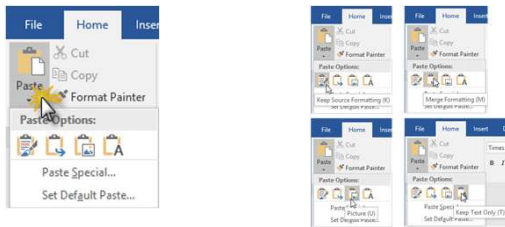
- Many elements of documents are repeated from prior documents
- Usual copy-and-paste methods often result in formatting disasters
- Looking for prior examples of frequently-used document elements takes time better spent doing more substantive legal work

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1. Learn to paste better

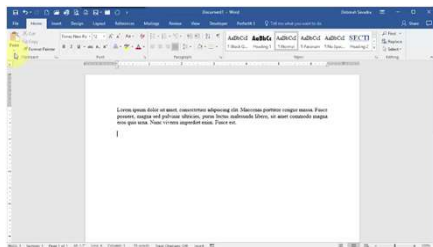


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1. Learn to paste better



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1. Learn to paste better

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2. Teach Word to paste better

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3. Fix pasted text on-the-fly

This is some formatted text I'm pasting in from another document. *I've reformatted it with different font and paragraph settings to demonstrate the various ways text can be pasted into a document.*

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4. Multi-Paste with the Clipboard

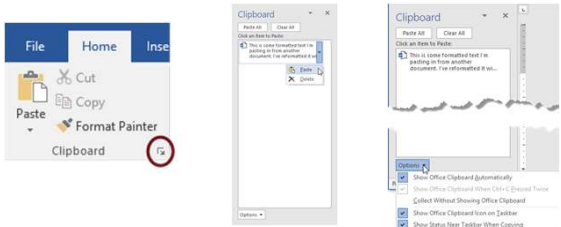
- Windows saves up to 24 of your Copy/Cut actions to its Clipboard
- Access Clipboard from within Microsoft Word or any Office application
- Great for repeating the same text or other elements within the same document—you can choose an element from the Clipboard to paste again and again

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4. Multi-Paste with the Clipboard

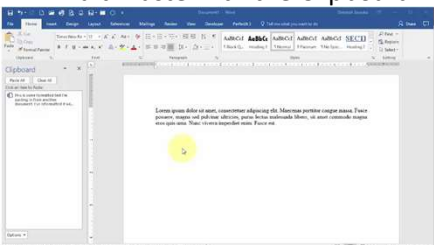


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4. Multi-Paste with the Clipboard



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5. Move Beyond Pasting with Quick Parts

- Why spend time looking for, copying, pasting, and fixing text you re-use frequently?
- Quick Parts gives you 2-click access to common document elements like signature blocks, notary acknowledgements, certificates of service, etc.

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5. Move Beyond Pasting with Quick Parts

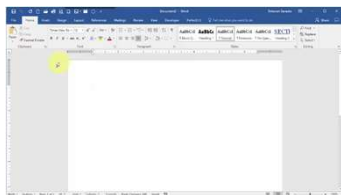
- Quick Parts is part of Microsoft Word's Building Blocks feature
- BuildingBlocks.dotx (template) is where Word stores built-in text and design elements like page numbering formats, watermarks, etc.
- Save your own Quick Parts in custom templates to make text available in the right context (pleading template, corporate formation template, etc.)

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Example of a Quick Part



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How to save text to Quick Parts

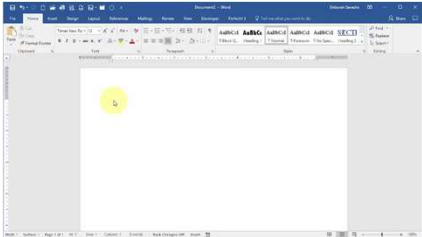
1. Find an example and copy it
2. Open a new document with **CTRL-N** or **File tab > New > Blank Document**
3. Paste your example into the blank document and convert formatting to Normal Style (more later on why that's key)
4. Select text with mouse or keyboard
5. **Insert tab > Quick Parts > Save Selection to Quick Part Gallery**

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How to save text to Quick Parts



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Why is it important that Quick Parts be “Normal”?

- Quick Parts in “Normal” text Style prevents disruption of new document’s formatting
- “Normal” Quick Parts conform to formatting of destination document
- Otherwise, you lose the benefit of using Quick Parts, since you have to re-format on-the-fly!

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6. AutoText = Quick Parts - Mouse

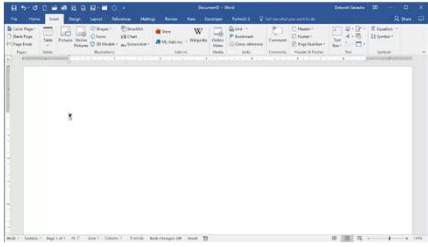
- Great for those who want to keep hands on keyboard
- Requires unique prompt of at least 4 characters
- Again, this is a Building Block, just in a different gallery

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6. AutoText = Quick Parts - Mouse

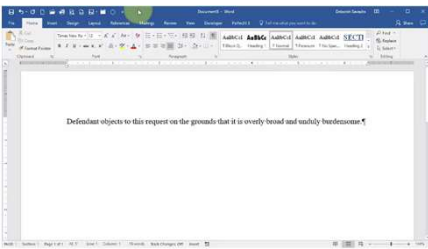


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6. AutoText = Quick Parts - Mouse



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7. Special Considerations for TOA/TOC

• Lorem ipsum dolor sit amet, consectetur adipiscing elit. *Johnson v. Booker T. Washington Broad. Serv., Inc.*, 234 F.3d 501, 510 (11th Cir. 2000) [TA]

Johnson v. Booker T. Washington Broad. Serv., Inc., 234 F.3d 501, 510 (11th Cir. 2000)'s *Johnson v. Booker T. Washington Broad. Serv., Inc.*, 234 F.3d 501, 510 (11th Cir. 2000)'s (1) (citing *Faragher*, 524 U.S. at 907).

CERTIFICATE OF COMPLIANCE [C] **CERTIFICATE OF COMPLIANCE** [C] **CERTIFICATE OF COMPLIANCE** [C] **CERTIFICATE OF COMPLIANCE** [C]

• The undersigned certifies that this brief complies with the type-volume:

- Table of Authorities and Table of Contents markup isn't formatting; it's hidden text

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7. Special Considerations for TOA/TOC

- Importing TOA/TOC codes may wreak havoc with your new brief.
- Before recycling TOA/TOC coded text:
 - Set hidden text to show (¶ button on Home tab) in source document
 - Check cut-and-paste settings (File tab > Options > Advanced > Copy & Paste Settings)
 - Copy and paste text into a blank "staging" document
 - Remove these codes with Find & Replace
- Full article at <https://legalofficeguru.com/recycle-briefs-safely>


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7. Special Considerations for TOA/TOC

Show Hidden Text



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7. Special Considerations for TOA/TOC

File tab > Options

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7. Special Considerations for TOA/TOC

CTRL-H

or

Home tab > Editing > Replace

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7. Special Considerations for TOA/TOC

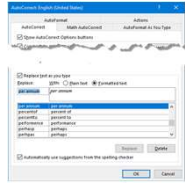
- Move clean text to document-in-progress using **CTRL-A** (to select all text) and **CTRL-X** (to cut it from the staging document).
- Don't forget to use your Paste Options!

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If-we-have-time bonus: Hacking AutoCorrect

- Unformatted entries:
<https://legalofficeguru.com/make-up-for-your-bad-typing-with-autocorrect/>
- Formatted entries:
<https://legalofficeguru.com/formatted-autocorrect-entries/>




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Questions?



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