

# Document Competency: What Every Legal Professional Should Know for Effective & Efficient Drafting in Word

Modules from A Discussion of Document-Creation Workflows and Best Practices Guide

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## MODULE FOR STAGE 7: On-Screen Review: Navigating and Reviewing Electronic Documents

On-screen review can be part of any of drafting stage, but will be most important during collaboration, review, or finalization processes. When creating a document, legal professionals will often compare two similar documents or reference a set of definitions in one part of the document while drawing on those defined terms in a distant part. Whether working with one long document or multiple documents, effectively using Microsoft's on-screen review features improves the process. One of the most useful, but overlooked features, is the option to view documents side-by-side and synchronously scroll, which allows for easy comparison between two documents. Another is the split-screen view, which makes it easy to display a cross-reference target in the top half of the window, while showing the reference in context in the bottom half of the window.

On-screen review can give the drafter and the reader a complete picture of how a document fits together, while also allowing for hiding or minimizing portions of the document to reduce distraction and overwhelm. Using styled headings activates the Navigation Pane, which reveals outline levels in the document, offers quick navigation through the document, and reduces the need to scroll large chunks of the document by collapsing (hiding) information at the heading level. It can also reveal document elements or weaknesses that might not otherwise be apparent.

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When collaborating, the flexibility of on-screen review makes it easy to review, accept, dismiss, or hide feedback using Comments and Track Changes. Controlling the granularity of changes shown and the ability to ignore an overzealous commenter can make a daunting process manageable.

### Tasks You Should Expect to Perform During Stage 7

- Viewing and comparing documents side-by-side
- Using the Navigation Pane
- Checking the Style Area view
- Activating Show/Hide mode
- Printing/previewing
- Splitting the screen
- Viewing multiple pages
- Collapsing/expanding headings
- Reviewing suggested revisions: Simple Markup, All Markup, No Markup, Show Markup
- Showing/hiding ink

## Here's How You Can Take It to The Next Level

Microsoft Word's Show/Hide feature can display control characters such as paragraph endings, manual line breaks, tabs, non-breaking hyphens, non-breaking spaces, page, column or section breaks, and fields which generate automatic content (e.g., Tables of Contents, page numbering, etc.). Use this feature to display these characters and codes. It is also helpful for troubleshooting formatting issues, especially in recycled documents.

Similarly, understanding the view settings in Microsoft Word's Track Changes feature to dismiss or make visible specific markup, such as comments, insertions, and deletions is critical during any review process where change tracking is enabled.

It is also possible in Microsoft Word to collapse and expand headings. This collapses all levels below the heading until the next heading level 1. This view is useful for collapsing areas of the document, thus reducing the need to scroll large chunks of the document. This view can be alarming when collapsed—the collapsed sections are not visible—causing the document to appear as if it is missing pages.

*Understanding the view settings in Track Changes to dismiss or make visible specific markup, such as comments, insertions, and deletions is critical during any review process.*

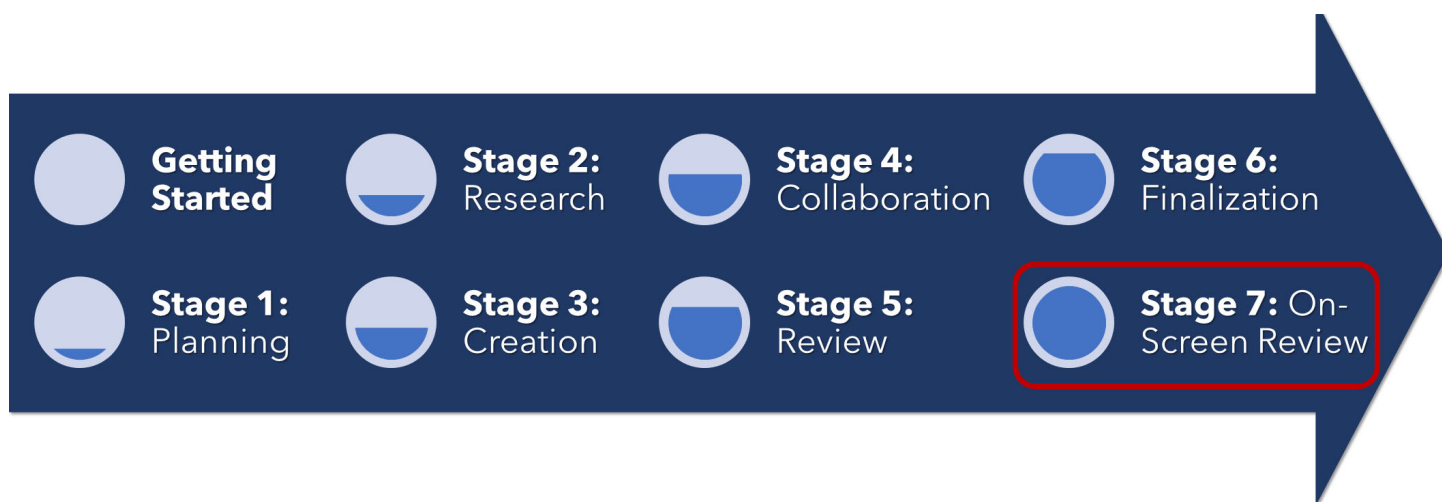
### Effective On-Screen Review Checklist

Have you completed these on-screen review tasks?	Here's How to Do It in Word	Work More Efficiently with These Professional-Level Tools
<input checked="" type="checkbox"/> <b>Viewed and compared documents side-by-side</b> from Window group of View tab	<a href="#">How-To</a>	<p><i>Note: You will use these within specific workflows. As such, added them to the Quick Access Toolbar as shortcuts or used tools from in your template package (BigHand) or incorporated into automated workflows such as DocXtools, or Contract Companion (e.g., Style View and/or Split Views)</i></p>
<input checked="" type="checkbox"/> <b>Used Navigation Pane to review headings</b> and overall document structure and flow or to reorganize document	<a href="#">How-To</a>	
<input checked="" type="checkbox"/> <b>Checked Style Area view to confirm style assigned to each paragraph</b> through Draft or Outline views available on View tab	<a href="#">How To</a>	
<input checked="" type="checkbox"/> <b>Activated Show/Hide mode using Show/Hide ¶ button to reveal hidden characters</b> like spaces and paragraph markers	<a href="#">How To</a>	
<input checked="" type="checkbox"/> <b>Previewed how document would print</b> using Print Preview under File tab	<a href="#">How-To</a>	
<input checked="" type="checkbox"/> <b>Split the screen to view two parts of the same document (or multiple documents) at the same time</b> using Split Screen from Window group of View tab	<a href="#">How-To</a>	
<input checked="" type="checkbox"/> <b>Viewed multiple pages simultaneously</b> to get a sense of overall layout from Zoom group in View Tab with Print Layout activated	<a href="#">How To</a>	

<input checked="" type="checkbox"/> <b>Collapsed/expanded headings</b> to facilitate focused review based on outline level	<a href="#">How-To</a>
<input checked="" type="checkbox"/> <b>Showed or hid ink from a digital markup</b>	<a href="#">How-To</a>

NOTE: When surveyed, legal practitioners suggested that non-substantive document-creation tasks should take no more than 5 minutes per page. If you are spending more than 5 minutes per page, please consider technology training or trying a professional-level tool that will improve your efficiency and effectiveness.

## Putting the On-Screen Review Tasks in Context



## About the Effectiveness Project

This module is an excerpt from a comprehensive working paper by the Effectiveness Project team. The Effectiveness Project is an ongoing collaboration of legal professionals that seeks to provide a clear framework for document creation through identifying best practices, suggesting baseline skills, and offering curated how-to resources. The group was formed in March 2020 and released its working paper in August 2021.

The team is led by Ivy B. Grey, former practicing lawyer and Vice President of Strategy & Business Development for WordRake and Tony Gerdes, Director of Knowledge and Innovation at Offit Kurman, P.A., and Contributing Member of LTC4™ (Legal Technology Core Competencies Certification Coalition). The group also includes Rachel Baiden, Global Technology Training Manager, Squire Patton Boggs; Adrian Bailey, Chief Architect, DocStyle, LLC; Chris Cangero, Chief Executive Officer, DocStyle, LLC; Dave DiCicco, Senior Director of Product Management, LexisNexis; Florentina Field, Co-Founder of Prelimine, Litigation Attorney; Jacob Field, Co-Founder of Prelimine; Sherry Kappel, Evangelist, Litera; Colin Levy, LegalTech Evangelist and Blogger; and Dyane L. O’Leary, Associate Professor of Legal Writing and Director, Legal Innovation & Technology Concentration, Suffolk University Law School. The Effectiveness Project also received contributions from Alma Asay, Founder, Allegory; James Gillis, Estates and Trusts Attorney, Offit Kurman, P.A.; and Douglas Lusk, Founder, National Society for Legal Technology.

## Resources to Learn More About the Need for Document Competency

### | General Introduction:

1. [The Lawyer's Guide to Microsoft Word 2013](#) by Ben M. Schorr

2. [Microsoft Word for Lawyers](#) by the Lawyerist
3. [Formatting Legal Documents with Microsoft Word 2016](#) by Jan Berinstein, Ph.D.
4. [Wildcard Cookbook for Microsoft Word](#) by Jack Lyon
5. [Macro Cookbook for Microsoft Word](#) by Jack Lyon
6. [Microsoft Word For Legal Practitioners](#) by Monica Korf

## | Comprehensive:

1. Eugene Volokh, *Chief Justice Robots*, 68 Duke L.J. 1135 (2019) (discussing the roles for AI in legal practice, including writing briefs).
2. Ivy Grey, *Ethical Duty of Technology Competence: What Lawyers Need to Know* (Aug. 2020) available for download at [https://www.wordrake.com/tech\\_competence](https://www.wordrake.com/tech_competence)
3. Heidi Frostestad Kuehl, *Technologically Competent: Ethical Practice for 21st Century Lawyering*, 10 Case W. Res. J.L. Tech. & Internet 1 (2019).
4. E-Book: *The Lawyer's Guide to MS Word Training and Resources*, Intelligent Editing June 22, 2019), <https://legal.intelligentediting.com/blog/free-e-book-the-lawyers-guide-to-ms-word-training-and-resources/>
5. "Smart" Lawyering: Integrating the Duty of Technology Competency into the Legal Writing Curriculum, 19 U.N.H. Law Rev. 197 (2021) (Section IV(A)) available at <http://ssrn.com/abstract=3671632>.