

fssMacroSuite

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fssMacroSuite

User Guide

by Roger Ellis

fssMacroSuite

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1 Introduction



Welcome to the fssMacroSuite program. The fssMacroSuite ribbon was designed to add some essential tools to the standard Word Ribbon. Some of the tools are buttons that execute recorded keystrokes called **macros**. Most of our buttons fire a much more serious set of vba code routines and the term macro is a bit of a misnomer. The fssMacroSuite ribbon reorganizes Ribbon buttons and adds new Groups and Buttons in order to give the user a full **suite** of productivity macros.

The goal is to amplify what is on the Word ribbon and make it simpler without having to learn a totally new interface.

The **fssMacroSuite-Home/Templates Tab** (which can be renamed to reflect your firm name) is designed as a replacement for the standard Word 2007/2010 **Home Tab**. We do no remove the standard **Home Tab**, it occurs as the third tab in the ribbon interface. However, you will find just about every group of commands on the **fssMacroSuite Home/Templates Tab** plus the **QuickDocs** buttons, the **Template Selection** and the **Utilities** groups.

Word 2010 Home Tab:

File	YourFirmNa	me-Ho	me/Templates 1	fourFirmNam	ne-TOC/TOA/Nur	nbering	Home	Insert	Page Layout	Reference	es Mailin	gs Review	w View				۵
Paste	🖌 Cut 🛅 Copy 🍠 Format Paint	Be ter	ookman Old S ~ 14 B <i>I</i> <u>U</u> ~ abe	· A A	n" Aa+ ₩]]+ 💇 + <u>A</u> +		•)≣ • '⁄;;•	課 6 (=-	₹ 21 ¶ 2• ⊞ •	AaBb 11	1. AaE 122	a. AaB 1733	AaB1 11 DocTitle	AaBbCcl	AaBbC ¶Normal	Change ↓ Change Styles *	A Find * ab Replace Select *
CI	ipboard	6		ont	6		Para	graph	rg.		_	_	Styles		_	6	Editing

fssMacroSuite-Home/Templates Tab:

File	fssMacroSuite-Home/Templates	fssMacroSuite-TOC/TOA/Numbering Home	Insert Page Layout References	Mailings Review View	
Letterhead	Office Main * Templates *	Bookman Old Styl + 13 + 1Ξ + 1Ξ + 14/2	DI 1/2 inch A Quick Styles *	≪AutoText * ¶ Cir Para X Deletion *	👬 Find 👻 🚔 🔏 Cut
Memo	Dept. Litigation * Templates *	A゙ ベ <u>A</u> * [™] * 🥮 i i i i i i i i i i i i i i i i i i	+14 DI 1 inch 44 Styles	🕃 Symbols * 👖 Unformatted 📹 Clean up	ab Replace
Fax	Misc. Envelopes * Templates *	B I ∐ - abs x, x' 📕 ≣ 🗐 🖩	I ‡≣≁ 🔲 Normal	🤜 Dates/Stamps 👻 🗄 F Right 🛃 Reveal 🏴 Ltrhd	Select * * Format Painter
QuickDocs	Template Selection (v.12d) 5	i Font 🕫 Par	agraph 🕫 Styles 🛱	Insert Utilities	Editing Clipboard G

As you can see from the two images, both tabs contain

Font, Paragraph, Styles, Editing, Clipboard

but the fssMacroSuite-Home/Templates tab adds QuickDocs, Template Selection, Insert, Utilities

Many office users constantly have to create letters, fax covers, memos or other standard documents. The **QuickDocs** Group gives each office user the ability to define the "hot" three quick documents that they need. The label and the template are definable.

With the **Template Selection** tab, you can easily design a folder structure to hold your firm's templates. You have three definable categories (by default they are named: Office, Dept., Misc.) and you can create an unlimited number of choices and templates to go in those categories. You do not need to hire an expert to do this. All you need to do is create a folder and save a template in that folder.

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The second tab of the fssMacroSuite contains tools for working with Tables of Authorities (TOA), Table of Contents, Discovery and Paragraph Numbering.

File	fssMacroSuite	-Home/Templates	fssMacroSuite-TOC/TOA/Num	bering	Home Insert	Page Layout	References	Mailings	Rev	view	Viet	w
7	🍓 Insert TOA	🔝 Insert TOC	¶ Field Shading	¶¶ Separat	or 🕼 Delete To	OC Fields • S	sequence # • 1	Response	1	23	4	5
Gr	Edit Category	📑 Update TOC	📖 Select All	¶ Hidden	Para	• 5	pecial Interr. #	Response	6	78	9	
Cite	Update TOA	Go to TOC	{ r } Toggle fields	fc Mark E	ntry				+	A Sel	ect 🔸	
	TOA		TOC-Standard		TOC-Fields		Discover	у	1	Numbe	ring	

The function of these tools will be explained later in this documentation.

So, again, welcome to the fssMacroSuite with the tools to make your use of the new Ribbon interface more efficient and productive.

Roger Ellis President Fee Simple Software

2 Tab - fssMacroSuite - Home/Templates Tab

File	fssMacroSuite-Home/Templates	fssMacroSuite-TOC/TOA/Numbering Home	Insert Page Layout References	Mailings Review View	
Letterhead	Office Main * Templates	* Bookman Old Styl * 13 * 1Ξ * 1Ξ * 1Ξ * 1Ξ *	DI 1/2 inch 🛕 Quick Styles *		👬 Find - 🚔 🔏 Cut
Memo	Dept. Litigation - Templates	・ A゙ ベ <u>A</u> * 👻 * 🤭 詳 課 独 ¶	+14 DI 1 inch 44 Styles	🕃 Symbols - 👖 Unformatted 🝏 Clean up	ab Replace
Fax	Misc. Envelopes * Templates	- B I U - abs x, x' 📰 📰 🔳	‡≣≁ 🔲 Normal	쩋 Dates/Stamps 👻 🖪 F Right 🛃 Reveal 🌁 Ltrhd	Select * * Format Painter
QuickDocs	Template Selection (v.12d)	🕼 Font 🕼 Parag	graph 🗔 Styles 🗔	Insert Utilities	Editing Clipboard 🕞

The purpose of the fssMacroSuite - Home/Templates tab was discussed in the Introduction.

Each Group on this tab is explained below:

2.1 Group - QuickDocs



You may set the QuickDocs buttons to any template that you wish. fssMacroSuite ships with three custom templates that provide a connection to your Outlook Address Lists and to your LetterHead List

You select the "From" person from the Letterhead List and the "To" person from your Outlook Address List contacts. If you do not have the practice of filling in addresses, phone and fax numbers for your contacts, it would be to your advantage to do so.

Each of the templates has a "Userform" that has been designed to have a consistent look and layout.

IMPORTANT NOTE: Using Outlook is purely optional. You may enter the data manually.

2.1.1 Letterhead

The letterhead template accepts manual input or it can read addresses from Outlook.

- 1. Outlook does not have to be running for the template to work.
- 2. In the QuickDocs group, click the button that has been set to your letterhead, nomally the "Ltrhead" button.
- 3. For keyboard centric users, tab through the data entry fields and shift-tab to back up. Use the space bar to fire command buttons. Some command buttons are not in the tab sequence, particularly the "Make Default.." buttons, so you must use the mouse to click them.
- 4. Complete the dialog box shown below:

tterhead (Select the "I	rom" staff member then fill in the Recipient or lookup the Recipient in Outlook)						
From From	Cheatham, Will I. Make this the Default "From" choice						
Use Outlook Option –	Use Outlook to select To (Recipient) name						
	Accept Default or choose another Outlook contact list Contacts-FSS Make this the Default Contact List						
	Enter some characters to speed up response Last Name Ellis Select an Outlook Recipient for this template Ellis Softwary Lice this Contact / Designed						
To (Recipient)	Ellis, Roger - Fee Simple Software, Inc.						
nue	Mr. <u>Jump</u> rist Roger Pilutie W. Last Ellis Jum V						
Greeting style	Dear Title LastName Make this the Default Greeting Style						
Greeting	Dear Mr. Ellis						
Name	Mr. Roger W. Ellis Business Title President						
Company/Firm	Fee Simple Software, Inc.						
Address	605 O'Neal Drive Birmingham, AL 35226 Use Shift+Enter to create a line break for mult-line addresses and City ST and Zip lines						
Letterhead Specific –							
Via	CC: Use						
Re:	to enter						
Closing	Very truly yours v bcc entries						
Enclosures							
	QK <u>C</u> ancel						

2.1.1.1 The "From" section

Letterhead (Select the "From" staff member then fill in the Recipient or lookup the Recipient in Outlook)								
From								
From	Cheatham, Will I.		-	Make this the Default "From" choice				
Use Outlook Option —	Cheatham, Will I. Dewey, John R.	Will I. Cheatham John Dewey	ir s					
	Howe, Andy K.	Andy Howe	V					
	•							

The from choice box (hereinafter called a "combo box") allows you to pick one of your staff or attorneys for the letterhead. Notice the **"Make this the Default "From" choice"** button. When you first use this template, you may set the selected attorney or staff person as the default choice that is set every time that you run the template.

You do not have to set a Default if you do not wish to. If you enter a few characters of the last name of

9

the desired "From" person, the combo box will hunt for the first match to those letters.

The list of staff/attorneys is derived from the Letterhead list.

2.1.1.2 The "Use Outlook" Section

- Use Outlook Option -	Use Outlook to select To (Recipient) name	
	Accept Default or choose another Outlook contact list	Contacts-FSS Make this the Default Contact List
	Enter some characters to speed up response Last Name	Contacts
	Select an Outlook Recipient for this template	Contacts-Pitch Control Contacts (Mobile)
To (Recipient) Title	Jump First Middle	Contacts-FSS (Mobile) Contacts-Pitch Control (Mobile)

This section requires that you pick an Outlook address list (list of contacts). You may use your Contacts list or use a shared List. If the list appears in your Outlook screen as a choice, then it should appear in the combo box as a choice.

You can set a default contact list by clicking on the "*Make this the Default Contact List*" button after you have selected a valid list.

Enter a few characters of the last name of your contact to filter the list:

— Use Outlook Option –	Use Outlook to select To (Recipient) name		
	Accept Default or choose another Outlook contact list	Contacts-FSS	Make this the Default Contact List
	Enter some characters to speed up response Last Name	Ell	
	Select an Outlook Recipient for this template	Roger - Fee Simple Software, Inc. 💌	Use this Contact/Recipient
To (Recipient)	Linet Middle	Ellis, Roger - Fee Simple Software, In	c.

Tab from the selected name and use your thumb to hit the space bar to confirm the "Use this Contact/ Recipient" button or use the mouse.

2.1.1.3 The "To (Recepient)" Section

To (Recipient) Title	First Roger M	iddle W. Last Ellis Suffix 🔽
Greeting style Greeting	Mr. Miss Make this the De	fault Greeting Style
Name	Ms. Dr.	Business Title President
Company/Firm	Fee Simple Software, Inc.	
Address	605 O'Neal Drive Birmingham, AL 35226	Use Shift+Enter to create a line break for mult-line addresses and City ST and Zip lines

Once you have selected your contact or manually jumped to the "To" section, you must select a Title (Mr., Mrs., Miss etc.). As with all combo boxes, you may type a few characters and the tab out to select the value.

The name of the "To" recipient will be combined into a Greeting based on your designated Greeting Style:

tyle		Make this the Default Greeting Style	
tina	Dear Title LastName		- 1
	Dear FirstName		
ame	Gentlemen	Business	Title
	Manually edit		
Firm	E C 1 C 0 1		

The first time that you fill in one of the templates, please set a default Greeting Style.

To (Recipient) Title	Mr. Jump First	Roger Middle W.	٦
Greeting style	Dear Title LastName	Make this the Default Greeting Style	
Greeting	Dear Mr. Ellis		

Note that if you manually enter an address or any mult-line data, use Shift-Enter.

2.1.1.4 The "Letterhead Specific" Section

Via Re:		• CC:	bcc	:	Use Shift+Enter to enter
Closing		-			bcc entries
Enclosures	•	_			
		ПК	Cancel		
		011	gancer		

Select a choice from the Via combo box if necessary

terhead Specific —		-
Via	v	2
Re:		
Closing	Via Certified Mail - Return Receipt Requested Via Electronic Mail	
Enclosures	Via Facsimile Via Overnight Courier	
	Via Hand Delivery	
	Via U.S. Mail	

Fill in some Re: content

Select a Closing

Re:	
Closing	
losures	Vary truly yours
	Sincerely

Note that the preferred closing that was set in the Letterhead List is used. When you select the "From" person the closing that you filled in for that "From" person is used. You may type in any preferred closing that you wish if you want to override.

Fill in Enclosure or Enclosures if warranted.

Enter cc and bcc content.

If you enter bcc content, a page break will be added and the bcc data will be listed on the second page.

Mr. Roger W. Ellis February 21, 2012 Page 2							
bcc: dae kae cre							

2.1.2 Memo

emorandum (Select the	"From" staff member then fill in	the Recipient or	lookup the Recipie	nt in Outlook)		
From From	Cheatham, Will I.	• •	Make this the Default '	"From" choice		
Use Outlook Option —	Use Outlook to select To (Reci	pient) name				
To (recepient) Title	Jump First	1	Middle	Last	Suffix	•
Greeting		Make this the	e Default Greeting Styl	e		
Name			Business	Title	•	
Company/Firm						
Address			Use Shift+E mult-line ad lines	nter to create a line break fo Idresses and City ST and Zip	ur.	
Memorandum Specific						
Re:				cc:		Use Shift+Enter to enter multiple cc's
	l	ŌK	Ca	incel		

2.1.2.1 The "Memorandum Specific" Section

The Memorandum Specific section only has two data entry fields: RE: and CC:

Once you fill in a "Regarding" RE: phrase and then any (optional) CC: information the template will open and let you type in your Memo content.

2.1.3 Fax Cover

ax Cover Sheet (Select	the "From" staff member then fill in the Recipient or lookup the Recipient in Outlook)	×
– From – From From	Cheatham, Will I. Make this the Default "From" choice]
— Use Outlook Option —	Use Outlook to select To (Recipient) name	
– To (recepient) Title Greeting style	Jump First Middle Last Suffix Make this the Default Greeting Style Make this the Default Greeting Style Image: Comparison of the style	
Greeting Name Company/Firm	Business Title	
Address	Use Shift +Enter to create a line break for mult-line addresses and City ST and Zip lines	
– Fax Specific Fax <u>N</u> umber: No. <u>P</u> ages: Re:	Office Phone No.: Client Matter No.:	
Comments:	Use Shift+Enter to create multiple lines if needed	
I <u>f</u> problems, call:	at:	
	<u>D</u> K <u>C</u> ancel	

2.1.3.1 The "Fax Specific" Section

Fax Specific Fax <u>N</u> umber:	Office Phone No.:	
No. <u>P</u> ages:	Client Matter No.:	
Re:		
Co <u>m</u> ments:		Use Shift+Enter to create multiple lines if needed
I <u>f</u> problems, call:	at:	
	Off Ormal	

If you use the **Outlook Option** and the contact that you selected had a fax number and office phone number filled in, they will automatically be placed in the Fax Number and Office Phone No. fields. Fill in the rest of the fields

If you did not select a contact with the Outlook Option, then fill in each field manually.

2.2 Group - Template Selection

What is a template? A template is a Word document that is saved with a .dotx or a macro-enabled template with a .dotm suffix. You may take any Word document and save it as a template by using save as and selecting the .dot? suffix. Typically you would prepare the document to be clean of any edits, so that you have a shell to fill in with file specific information. You can then use the same template over and over as the beginning point of document creation. Most large firms have developed a large number of templates for their practice. The beauty of a template is that you never change the original (unless you intend to edit it) because when you select a template it creates a new copy of itself.

fssMacroSuite provides three specialized templates that are "macro-enabled". Those templates utilize pop-up forms (called UserForms in Word terminology) to elicit information that can then be placed into the new document that is being created. The Userform that we provide for LetterHead for instance, inserts the name of the person that the letter is from into muliple locations in the letterhead itself and at the signature area. That is one of the reasons for using specialized templates. They can save a lot of time. Over the course of a day, or a week, the amount of time saved by using a template adds up and justifies the cost of creating the template.

2.2.1 Choose a Category

SMS-	Home/Temp	SMS-TO					
Office	Chicago	Te	mplates 🔹				
Dept.	Admin • Templates •						
Misc.	Envelopes	Ter	mplates *				
Template Selection 🕞							

There are three storage Categories for templates to help you classify your templates. You may name the three categories to any name that you wish. The only caveat is to keep the names fairly short to conserve space on the Ribbon. The standard install uses:

Office - If your firm has multiple offices, use this to differentiate office specific templates.

Dept - Store practice area or departmental (admin, accounting) templates here

Misc. - The catch all. Typically categories like Envelopes, Labels etc.

Check with your IT department if you wish to add sub-categories in each of the three main categories. There is no practical limit on how many sub-categories or templates that you may have.

2.2.2 Choose a Sub-category



As you can see from the image above, there are three sub-categories under the Dept. category in our Demo configuration. Each computer station can be configured to have a "default" sub-category in each of the three categories. See the <u>User Configuration</u> topic for information about how to set the default sub-categories.

2.2.3 Choose a Template



Once you have selected your sub-category, click on the Templates drop-down menu to see available templates. The above image shows our Demo Dept.- Litigation Templates.

VourFirm-Home/Templates			YourFirm-TOC/TOA/Numbering Home					Home		
ţ	Office	Main	*	Temp	lates 🔻	Calibr	i (Body)	- 11	*	:Ξ + ±Ξ
	Dept.	Admin	*	Temp	mplates 🔹 🗛 🗛 🦉 🦉 🛊					
	Misc.	Envelopes	*	Ð	Check	Request	t.dotx			
s	Tem	plate Select	ion	Ð	Deliver	y Reque	est.dotx			
C	A	T 🖬 🏢	T	Ð	Emerge	ency Cor	ntact For	rm.dotx		
				•	Employee Name.dotx					
				•	Marketing Reimbursement Request.dotx					
				P)	New C	lient Inf	ormatior	n.dotx		
				•	New M	latter co	ncerning	g existing	Client	.dotx
				•	Project Request Form.dotx					
				•	Staff Self Review Form.dotx					
				•	Staff Timesheet.dotx					
				•	Word Processing Request.dotx					
				0	Refrest	n List				

The above image shows our Demo Dept.- Admin Templates

2.3 Group - Font



The font group duplicates the regular Home tab's font group and includes:

- Grow Font
- Shrink Font
- Font Color
- Text Highlight Color
- Clear Formatting
- Bold
- Italic
- Strikethrough
- Subscript
- Superscript

2.4 Group - Paragraph



The Paragraph group duplicates the regular Home tab's paragraph group (plus two double indent buttons described below) and includes

- Bullets
- Numbering
- Multilevel List
- Decrease Indent
- Increate Indent
- Sort
- Show/Hide
- Left Justification
- Center Justification
- Right JustificationFull Justification
- Puil Justilication ■ DI ½ inch
- (Double-Indent, ½ inch)
- DI 1 inch
- (Double-Indent, 1 inch)

2.4.1 Direct Formating 1/2 and 1 Inch indents

₩ DI 1/2 inch

This button applies double indent (direct formating) on the current paragraph with 1/2 inch left and right indents

+1+ DI 1 inch

This button applies double indent (direct formating) on the current paragraph with 1 inch left and right indents

2.5 Group - Styles



The Styles Group is a replacement/copy of the standard Home Tab Styles group

2.5.1 Quick Styles

QuickStyles: Displays the Quick Styles pane

🍌 Quick Styl	les 🔻 🔫 Aut	:oText 🔻	🛒 Cir Para	X Deletion -	👫 Find			
AaBb	1. AaE ^{π22}	а. АаВ ¶33	AaB1 T DocTitle	AaBbCcl ۴	AaBbC			
AaBb	AaBbC	AaBbC	AaBbC	AaBbC	AaBbC			
Ith	TrainerNote	II TrainerN	Tvg	TvgIm	II vGraphic2			
AaBbC	AaBbCc	AaBb	AaBb	AaBb	(i) AaBl			
¶No Spaci	r	Heading 1	11 Heading 2	11 Heading 3	¶Heading 4			
1) AaBb	a) AaBbC	i) AaBbC	<i>а. АаВb</i>	App(AaBl			
¶Heading 5	¶Heading 6	¶Heading7	¶Heading 8	THeading 9	t			
AaBb(<i>AaBbCc.</i>	AaBbCc.	AaBbCc	A <i>aBbCcL</i>	AaBbCci			
st	Subtle Em	Intense E	Strong	_{Quote}	Intense Q			
<u>AaBbCcI</u>	AaBbCc]	AaBbCcl	AaBbC	AaBbCeD(AaBbC			
Subtle Ref	Intense R	Book Title	¶List Para		11 TOC Hea			
■ <i>1</i> πib	AaBbC ¶List Bull							
Save Selection as a New Quick Style Clear Formatting Apply Styles								

2.5.2 Styles

Styles: Displays the Styles pane



2.5.3 Normal

Normal: Applies the Normal style at the insertion point

2.6 Group - Insert



The Insert Group ia a special fssMacroSuite group. Each button is described below:

2.6.1 AutoText

🔫 AutoText 🔻

This button produces a quick list of any autotext entries that you may have saved.

2.6.2 Symbols



This dropdown menu provides some commonly used symbols. If you have ever tried to find an x'ed box symbol, you will appreciate the convenience.

2.6.3 Date/Stamps



These Dates/Stamps selections give you a convenient way to insert dates and the name of your current document.

2.7 Group - Utilities



1. Utilities Group

2.7.1 Clr Para

🕈 Clr Para

This button removes paragraph formatting in the current paragraph

2.7.2 Deletion



The choices in this drop-down menu allow you to

Delete headers

Delete Section breaks

Delete footers

Delete cross-references

2.7.3 Unformatted



This button allow you to paste text that is in the clipboard into the document without any formatting

2.7.4 Clean up



Important: Save the document before using the tool. The button copies the current document and pastes the text into a new document without any formatting. The macro closes the document without saving the current changes.

2.7.5 F Right

F Right

WordPerfect veterans will miss the flush right option. With Word you must set a Right Tab. This button offers a quick and dirty way to get the same effect as a WordPerfect flush right by creating a hidden two cell table and setting the alignment of the second table cell to be right aligned. The cursor will be positioned into the second cell for your data entry.

÷	
_	
	i

You may decide to have left aligned text and right aligned text on the same line.

Turn on Table Gridlines to see the table structure and to place your cursor in the correct cell.

₽	
Some left aligned text	Some right aligned text

The end result with table gridlines turned off:

Some left aligned text

Some right aligned text

2.7.6 Reveal

Reveal

This button checks to see if the current document contains tracked changes.

2.7.7 Lttrhd

*** Ltrhd

The Ltrhd button is a special button that can be used in conjunction with the fssMacroSuite provided Letterhead/Memo/Fax Cover Sheet templates. It will allow you change the attorney that is inserted in the "from" sections of those forms to a different attorney.

Perhaps you a form that you had finished but you selected the wrong "from" attorney or staff person. Click this button and you will see this special userform:

×
rhead, fax cover and memo fssMacroSuite templates
•
Continue

When you click on the drop-down arrow on the right of the combo box it will expand to show more choices or simple type some the characters of the last name of the staff person that you wish to choose.

tterhead Attorn	ey					
- Select a diff	erent attorney fo	or the letterhead,	fax cover and	memo fssMacroSu	iite templates	; ———
Attorney	Cheatham, Will I.					-
	Cheatham, Will I.	Will I. Cheatham	Insincerely	WICheatham@dcł	(212) 444-3335	WIC
	Dewey, John R.	John Dewey	Sincerely	JRDewey@dch-lav	(212) 444-3334	JRD
	Howe, Andy K.	Andy Howe	Warmly	AKHowe@ dch-lav	(212) 444-3336	AKH
Ca	•					E F
Ca						

Select a different attorney or staff person and the name and other values associated with that name will be copied into the document.

2.8 Group - Editing



This Group duplicates the functionality of the standard Word Home Tab's Editing Group of buttons and menus.

2.9 Group - Clipboard



This Group duplicates the functionality of the standard Word Home Tab's Clipboard Group of buttons and menus.

3 Tab - fssMacroSuite - TOC/TOA/Numbering

File	SMS-Home/Te	mplates	SMS-	FOC/TOA/Numbe	ring	Home	Insert	Page Layout	References	s Mailings	Review	View	Der	elope	er 🛛	
7	🖳 Insert TOA	📄 Insert	тос	T	Field	Shading	¶¶ Separato	r 🔗 Delete 1	TOC Fields	Sequence #	 Response 	1	2	3 4	1 5	5
Gr	Edit Category	📑 Upda	te TOC	🗄 Select All			¶ Hidden P	ara		• Special Interr.	# • Respon	ise 6	7	8 9	9	
Cite	📲 Update TOA	Go to	тос	{ r } Toggle fields			{rc} Mark Ent	ry				+	A	Select	+	11
	TOA			TOC-Standard				TOC-Fields		Disco	very		Nun	berin	g	

This fssMacroSuite Tab contains groups of controls to help deal with Tables of Authorities/Table of Contents/Discovery and Numbering.

Each group is discussed below:

3.1 Group - TOA



Word has special tools for Tables of Authorities. This group consolidates them for easy access.

3.1.1 Mark Cite



Mark Cite: Displays the Mark Cite dialog.

Mark Citation	<u>? ×</u>
Selected text:	
	Next Citation
	Mark
Category: Cases	Mark All
Short citation:	Category
	Category
Long citation:	
	Cancel

3.1.2 Insert TOA

🗟 Insert TOA

Insert ToA: Displays the Insert ToA dialog

ble of Auth	orities		? ×
Index T	able of Contents 📔 Table of Figures	Table of Authorities	
Print Pre <u>v</u> iew	1	Category:	
Cases Baldwin v	v. Alberti,	All Cases Statutes Other Authorities Rules	
58 Wn. Dravo Cor	2d 243 (1961) 5, 6 rp. v. Metro. Seattle,	Treatises Regulations Constitutional Provisions 8	•
Use passi	im		
Keep orig	inal formatting		
'a <u>b</u> leader:	······ ·		
forma <u>t</u> s:	From template		
		Mark Citation	odify
		ОК	Cancel

3.1.3 Edit Category

Edit Category

Edit Category: Displays the Edit Category dialog..

Edit Category	? ×
Category:	
Cases Statutes Other Authorities Rules Treatises Regulations Constitutional Provisions	
Replace with:	
Cases	
Replace OK Can	cel

3.1.4 Update TOA

🖹 Update TOA

Update ToA: Updates the ToA field

3.2 Group - TOC-Standard

nplates	SMS-	тос	/TOA/Numberi	ing	Home
📄 Insert	t TOC	T		Field	Shading
📑 Upda	te TOC	E.	Select All		
🔓 Go to	TOC	{r}}	Toggle fields		
		то	C-Standard		

This group consolidates several buttons that are useful for working with Table of Contents creation.

3.2.1 Insert TOC

Insert TOC

Insert ToC: Displays the Table of Contents definition dialog as shown below:

able of Contents	<u>? ×</u>
Index Table of Contents Table of Figures	Table of Authorities
Print Pre <u>v</u> iew	Web Preview
BodyText1	BodyText
DocTitle1	DocTitle
Heading 11	Heading 1
TableHead,th1	TableHead,th
Show page numbers	Use hyperlinks instead of page numbers
I✓ <u>Right align page numbers</u> Ta <u>b</u> leader: ▼	
General Forma <u>t</u> s: From template 💌 Show levels: 3 🌲	
	Options Modify
	OK Cancel

3.2.2 Update TOC

📑 Update TOC

Update ToC: Updates the Table of Contents field are changes are made to a document. You might delete a page or reorder some text that would make it necessary to rebuild the Table of Contents.

3.2.3 Go to TOC

Go to TOC

Go to ToC: Go to the Table of Contents page. This is an fssMacroSuite addition.

3.2.4 Show Hide Formatting Marks

¶

This duplicates the same button that appears on the fssMacroSuite's Paragraph Group and the Standard Word Ribbon's Paragraph Group.

This is a toggle on/off button that when toggled on reveals paragraph marks and other formatting indicators.

3.2.5 Select All

E Select All

Select All: This is a button that is used to select all content. The hot key for this is Control-A. To end the selection: click anywhere in the white space of the document.

3.2.6 Toggle Fields

{ाट} Toggle fields

Toggle fields: Toggles the display of field codes e.g., "{PAGE}" and field results, e.g., "-1-".

3.2.7 Field Shading

Field Shading

Field Shading: If your document has field codes embedded in it, this will turn on shading around all field codes.

3.3 Group - TOC-Fields



This Group consolidates several tools for working with Tables of Content.

3.3.1 Separator



Separator: Insert Style Separator (Ctrl+Alt+Enter)

3.3.2 Hidden Para

¶ Hidden Para

Hidden Para: Insert paragraph mark with "Hidden" character formatting and the color red applied. Used for compatibility with firms using this method to mark Table of Contents entries with run-in headings.

3.3.3 Mark Entry

{ि Mark Entry

Mark Entry: Mark Table of Contents Entry; mark text with TC fields; allows user to specify ToC levels.

3.3.4 Delete TOC Fields

Delete TOC Fields

Delete ToC Fields: Delete all TC marked entry fields from document.

3.4 Group - Discovery



Inserts sequence fields used to number interrogatories, requests and responses. See descriptions for each button below:

3.4.1 Sequence

Sequence #

Inserts: REQUEST NO. 1

The number is a field code that increments up by one on each insert.

3.4.2 Response (Sequence #)

Response

Inserts: RESPONSE TO REQUEST NO. 1

The number is a field code that increments up by one on each insert.

3.4.3 Special Interr.

Special Interr. #

Inserts: SPECIAL INTERROGATORY NO. 1

The number is a field code that increments up by one on each insert.

3.4.4 Response (Special Interr. #)

Response

Inserts: RESPONSE TO SPECIAL INTERROGATORY NO. 1

The number is a field code that increments up by one on each insert.

3.5 Group- Numbering



fssMacroSuite ships with 25 predefined numbering schemes. Click on the word Select to open the numbering dialog.

3.5.1 Numbering Dialog Page 1



3.5.2 Numbering Dialog Page 2



3.5.3 Numbering Dialog Instructions

Click to select a numbering scheme, e.g., Style Sheet #3.

Word confirms your selection.



Heading styles 1-9 are now formatted with the selected numbering scheme.

3.5.3.1 Applying Heading Styles

After selecting a numbering scheme, apply the heading styles using any of the following methods:

In the Numbering group, click a level number.



Or use these keystrokes:

Heading 1	Ctrl+Alt+1
Heading 2	Ctrl+Alt+2
Heading 3	Ctrl+Alt+3
Heading 4	Ctrl+Alt+4
Heading 5	Ctrl+Alt+5
Heading 6	Ctrl+Alt+6
Heading 7	Ctrl+Alt+7
Heading 8	Ctrl+Alt+8
Heading 9	Ctrl+Alt+9

Note: Word includes the Ctrl+Alt+ for Heading Styles 1 to 3. fssMacroSuite added the extra keystroke mappings for 4-9.

or from the Styles group, click the Quick Styles icon, then click a heading.

yout	Refere	ences
A	Quick Style	es 🕶
<u>4</u>	Styles	
	Normal	
	Styles	E.

A Quick Styl	es 🔹 🤫 Aut	toText =	📌 Clr Para	X De
AaBb	1. AaE	a. AaB	AaB1	Aal
11	π22	1733	11 DocTitle	
AaBb Ith	AaBbC TrainerNote	AaBbC	AaBbC Tvg	Aal
AaBbC	AaBbCc	AaBb	AaBb	A
¶ No Spaci	r	Heading 1	¶ Heading 2	11 Hea
1) AaBb	a) AaBbC	i) AaBbC	a. AaBb	А]
¶Heading 5	¶Heading 6	¶Heading7	¶Heading 8	
AaBb(<i>AaBbCc.</i>	<u>AaBbCc.</u>	AaBbCc	Aa£
	Subtle Em	Intense E	Strong	Qi
<u>AaBbCcI</u>	AaBbCc]	AaBbCcl	AaBbC	AaB
Subtle Ref	Intense R	Book Title	¶List Para	¶Ca
T Ib	AaBbC TList Bull	w Ouick Style		
Apply S	ormatting tyles	ew <u>Q</u> uick style		

Click Styles, then click a heading in the Styles pane.

A Quick Styles 🔹	Styles	* X
4 Styles	Clear All	_ =
Normal	Heading 1	<u>¶a</u>
Styles 🕞	Heading 2	<u>¶a</u>
	Heading 3	<u>¶a</u>
2	Heading 4	па
<u> </u>	Heading 5	па
	Heading 6	па
	Heading 7	па
	Heading 8	па
	Heading 9	па
	Normal	T
	No Spacing	¶
	Title	па
	Subtitle	<u>¶a</u>
manh Ona	Subtle Emphasis	a
graph One.	Emphasis	a
Paragraph	Intense Emphasis	a 📋
oranh One i	Strong	a
	Quote	<u>na</u> 🚽 🖡
Paragraph	Show Preview	
5. A	Disable Linked Styles	
wo Paragra	A 4 4	Options
wo Paragra		

Sample numbered document:

- I. Paragraph One Paragraph One
 - A. Paragraph Two Paragraph
 - 1. Paragraph Three Paragraph Three

4 User Configuration

Start Microsoft Word 2007/2010. In the Template Selection group, click the dialog launcher icon:

File	YourFirmName-Home/Templates			YourFirmName-TOC/TOA/Numbering			ering Home	Insert	Page Lay	yout P	References		
Letterhead	Office	Main	*	Templates -	Bookm	ian Old Styl	* 13		i≡ - i <u>s</u>	¥ 2€ DI	1/2 inch	A Quick	< Styles *
Memo	Dept.	Litigation		Templates 🔻	A A	A - 12	AB		∰ ∰ ĝ↓ <mark>¶</mark>	≯1 € DI	1 inch	4 Styles	5
Fax	Misc.	Envelopes		Templates z	BI	<u>U</u> - abe	$\mathbf{x}_2 \mathbf{x}^2$			+		📃 Norm	al
QuickDocs	Tem	nplate Select	ion	(v.12d) 👘		Font		15	Paragrap	bh	Γ ₂	Style	s Gr
					200								

4.1 Setting Paths and Default choices

The following configuration dialog displays

Configure the fssM	acroSuite	Template Folde	er Path and Default Template	Categories		X		
First time setup: do not know the l	You must ocation of	first use the br your template	owse button to browse to the s "parent folder" ask someor	e templates ne in your su	"parent" folder pport staff.	. If you		
Templates path: C:\Program Files\\fss\\fssMacroSuite\								
Label your catego must be named "	ory folders Location"	s then select the , "Department"	e "Default" folders for your ca , and "Misc" but can be labele	ategory fold ed as needeo	ers. The three f d.	olders		
"Location" folder Lab	oel	Office	Main		Browse			
"Department folder L	abel	Dept.	Litigation		Browse			
"Miscellaneous" folde	er label	Misc.	Envelopes		Browse			
You must click on	the "Refr	esh" button to	see choices for the Default A	ttorney.				
Default Attorney for Letterhead Templates: Cheatham, Will I.								
Label each Quick	doc on the	e left and then <mark>t</mark>	prowse and select the Quickd	oc template	•			
Quickdocs Label 1	Letterhead	fssMS_Demo	Browse					
Quickdocs Label 2	Memo	fssMS_Demo_Memo_12d.dotm Browse						
Quickdocs Label 3	Fax	fssMs_Demo	fssMs_Demo_Fax_Cover_12d.dotm Browse					
Finally change the	e name of	your SMS Home	e Template tab and TOC/TOA	tabs if you	wish.			
Your name for the Home/Templates Tab: fssMacroSuite-Home/Templates								
Your name for the Table of Contents/Table of Authorities/Numbering Tab:								
Be sure to hit "Save Configuration Settings" and then "Close". Validate Security is rarely used.								
Validate Security Save Configuration Settings Close								

Under Template path, click the Browse button and select the Macro Suite top level folder.

Note: You can add or rename the folders under the Department, Location, and Miscellaneous folders

Under Default folder for the Department Templates, select the appropriate folder, e.g., Admin.

Under **Default folder for Location templates**, select the appropriate folder, e.g., Main. You may wish to rename the "Main" folder to the name of the city of your primary office.

Under **Default folder the Miscellaneous Templates**, select the appropriate folder, e.g., Misc.

Under **Default Attorney for Letterhead Templates**, select an attorney specific to that particular user.

Optional: You may change the first tab in the ribbon to display the firm name instead of Macro Suite-Home/Templates:

Under **"Your name for the Home/Templates Tab"** enter the [Firm Abbreviation] in front of the word "Templates."

Under "Your name for the Table of Contents/Table of Authorities/Numbering Tab" enter the [Firm Abbreviation] in front of the phrase "TOC/ToA/Numbering."

Browse to the **Quick Docs** section. Select and Label each Quick Doc in turn. Short labels are recommended since the label can take up a lot of Ribbon space.

Click "Save Configuration Settings."

Click Close.

Exit and restart Word.

4.1.1 Settings stored in INI files

Note: If your firm uses Roaming Profiles, where more than one user can log on to a computer and get their own settings applied, then each user will have their fssMacroSuite settings preserved. The values that you set in the configuration dialog are **automatically** stored in ini files in these locations, depending on your version of Windows:

Windows 7	Word 2007	C:\Users\ YourUserName \AppData\Roaming\fssMacroSuite\
	Word 2010	C:\Users\ YourUserName \AppData\Roaming\fssMacroSuite\
Windows XP	Word 2007	C:\Documents and Settings\yourusername\Application Data\fssMacroSuite
	Word 2010	C:\Documents and Settings\yourusername\Application Data\fssMacroSuite

The ini files are named fssMS_Local.ini and fssMS_Global.ini. In testing, ini files were faster than registry entries, so they were utilized.

fssMS_Global.ini contains settings that are typically consistent from station to station in a

network.

```
[config]
StartFolder=C:\Program files\fssMacroSuite\fssMacroSuite_Demo\
Dept_Default=Litigation
Loc_Default=Main
Misc_Default=Envelopes
Home_Tab_Default=YourFirmName-Home/Templates
TOC_Tab_Default=YourFirmName-TOC/TOA/Numbering
Location_Label=Office
Dept_Label=Dept.
Misc_Label=Misc.
```

fssMS_Local.ini contains settings that can be variable by user, such as who

```
[Attorney]
Key=Cheatham, Will I.
One=Cheatham, Will I.
Two=Will I. Cheatham
Three=Insincerely
Four=WICheatham@dch-law.com
Five=(212) 444-3335
Six=WIC
```

```
Seven=Attorney-at-law
Eight=Will Cheatham
 [QuickDocs]
QDLabel1=Letterhead
QuickLetterhead=fssMS_Demo_Letterhead_12d.dotm
QDLabel2=Memo
QuickMemo=fssMS_Demo_Memo_12d.dotm
QDLabel3=Fax
QuickFax=fssMs_Demo_Fax_Cover_12d.dotm
```

4.2 Letterhead List

fssMacroSuite provides templates that connect with Outlook to provide "To" data. The Letterhead List is a Word document that contains a table of staff names for the "From" data. Typically the letterhead list will be populated with all firm attorneys. Some firms also include the firm's staff members. To do this, they use column Eight and put in the staff member's name and a soft return (Shift - Enter) followed by the staff member's title.

To update staff names in the letterhead list, please follow these steps:

1. Open: C:\Program Files\fssMacroSuite\Letterhead_List\fssMacroSuite_Letterhead_list.docx

bkmFrom_O ne1 to bkmFrom_O ne4	bkmFrom_T wo1 to bkmFrom_T wo4	bkmFrom_T hree1 to bkmFrom_T hree4	bkmFrom_Four1 to bkmFrom_Four4 Emai Mandatory1	bkmFrom _Fiv e1 to bkmFrom _Fiv e4	bkmFrom_ Six1 to bkmFrom_ Six4	bkmFrom_ Sev en1 to bkmFrom_ Sev en4	bkmFrom_ Eight1 to bkmFrom_ Eight4	bkmFrom_ Nine1 to bkmFrom_ Nine4	bkmFrom _Ten1 to bmkTen4
Last,First Mandatory	Signature Mandatory	Closing Madatory		Direct Dial Phone Mandator y	Initials Mandatory	Title Optional	Letterhead Name Optional	Optional	Optional
Cheatham, Will I.	Will I. Cheatham	Insincerely	WICheatham@d ch-law.com	(212) 444 3335	- WIC	Attorney- at-law	Will Cheatham		
Dew ey, John R.	John Dew ey	Sincerely	JRDew ey@dch- law .com	(212) 444 3334	- JRD	Attorney- at-law	John R. Dew ey		
How e, Andy K.	Andy How e	Warmly	AKHow e@ dch- law .com	(212) 444 3336	- AKH	Attorney- at-law	Andy K. How e		

fssMacroSuite-Staff Letterhead Listing

- Input the names, titles, and preferred letter closings. You should consult with your fssMacroSuite contact about the use of the columns. Those fields marked "mandatory" must be used as directed in order to work with the associated Letterhead/Memo/Fax templates.
- 3. Use the Sort tool on the first column in the table to sort by Last Name, First Name. Note: The sort button only appears when you are in a table. It appears in the Table Tools tab as shown below.



4. Save and close fssMacroSuite_Letterhead_list.docx.

