RECOMMENDED WORD DEFAULT SETTING CHANGES

(For Word for Windows 2019 and 365)

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CHAPTER 1
DEFAULT SETTING CHANGES FOR WORD 2019

In General

NOTE that you get to all of the following screens by clicking the File menu ➜ Options.
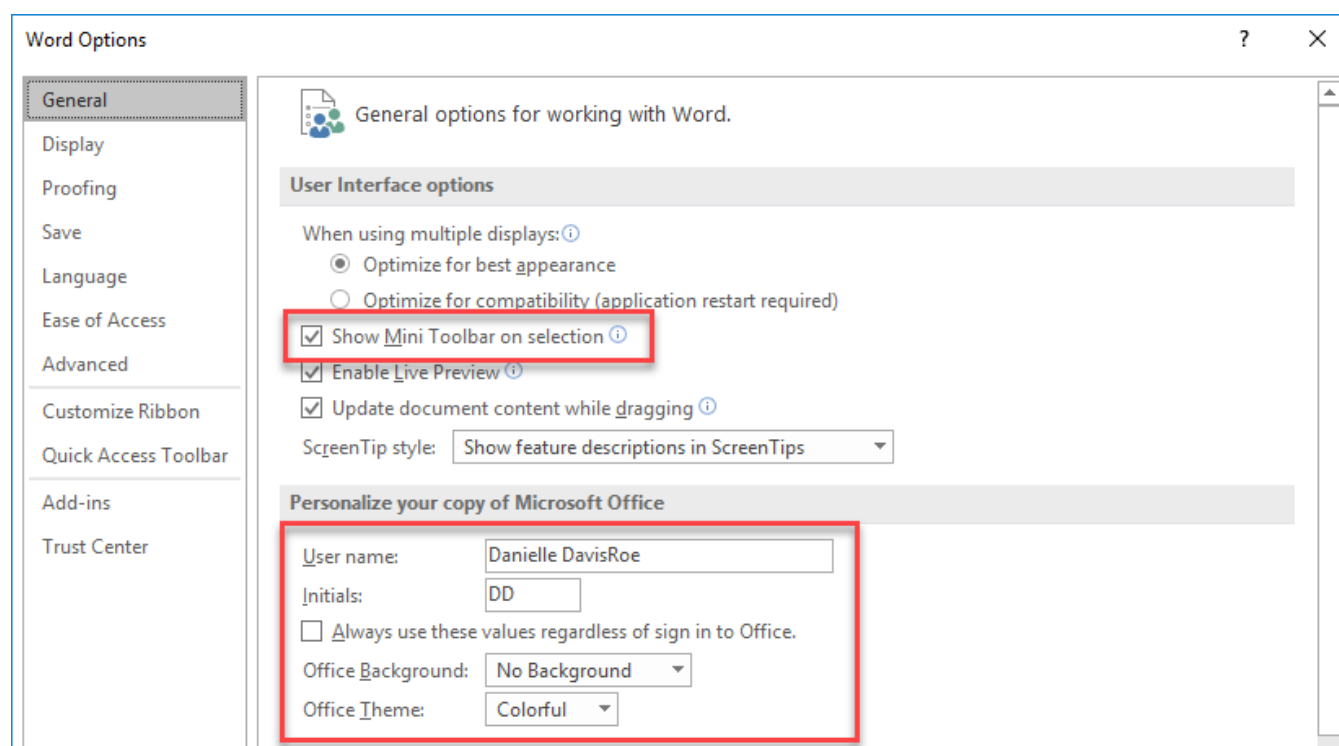
Options ➜ General

FIGURE 1-1

- Uncheck **Show Mini Toolbar on selection**. This controls whether an additional pop up window with common font options is displayed whenever text is selected. This can be distracting and cover up part of the document. Therefore, uncheck this box.

- **Personalization**: Make sure your name and initials are in the **User name** and **Initials boxes**. Check **Always use these values...** and choose an **Office Background** and **Office Theme**. The background is the frankly silly graphic that appears at the top, right-hand corner of the Word screen. You had a chance to choose something during installation but you may want to change it now that you've seen it. The default Office

Theme of stark, blinding white might not be what you would like. I recommend you change it to Colorful.
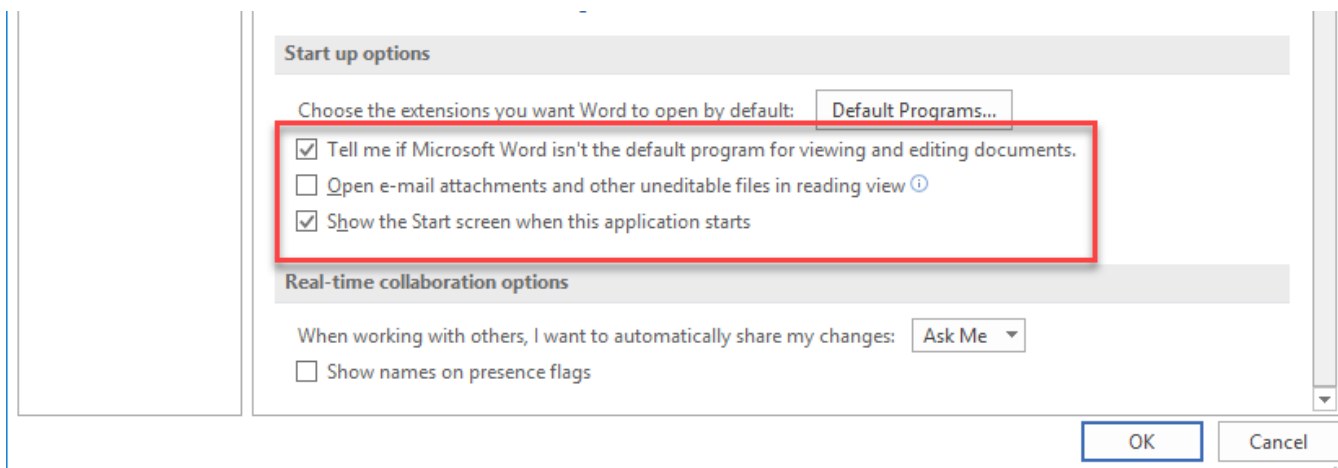

FIGURE 1-2

- **Tell me if Word isn't default program for viewing and editing documents**: This is just annoying, particularly if you just don't want Word to be your default.

- **Open e-mail attachments in Reading View**: Clear this so attachments open normally.

- **Get Rid of the Start Screen**. This is the giant template selection screen that opens whenever you open Word. If you would prefer to go directly to a blank document when you open Word, clear the **Show the Start Screen when this application starts** box.
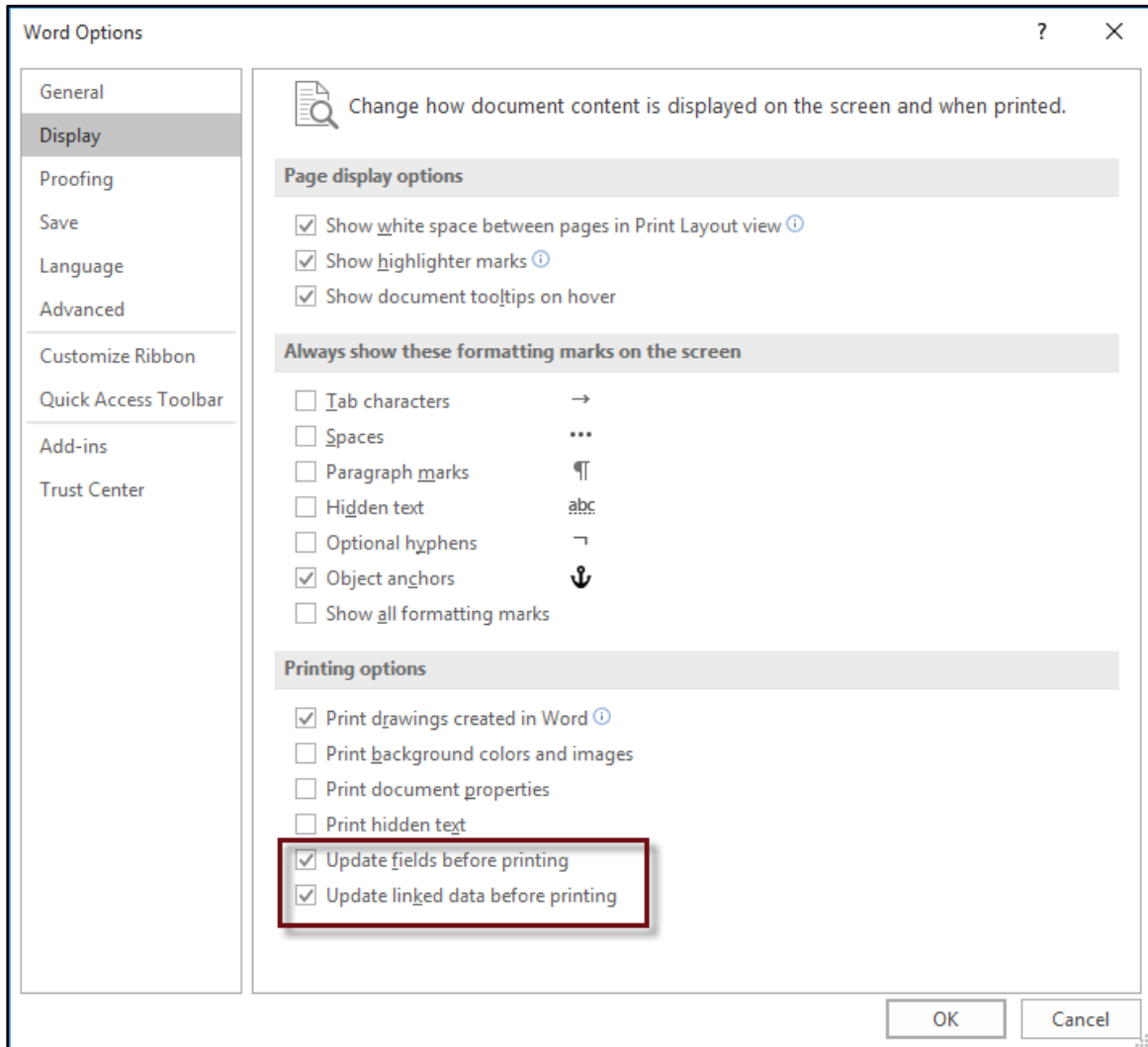
Options ➜ Display

FIGURE 1-3

- Check **Update fields before printing**. Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.

- Check **Update linked data before printing**. This will make sure that all linked files are updated before printing.
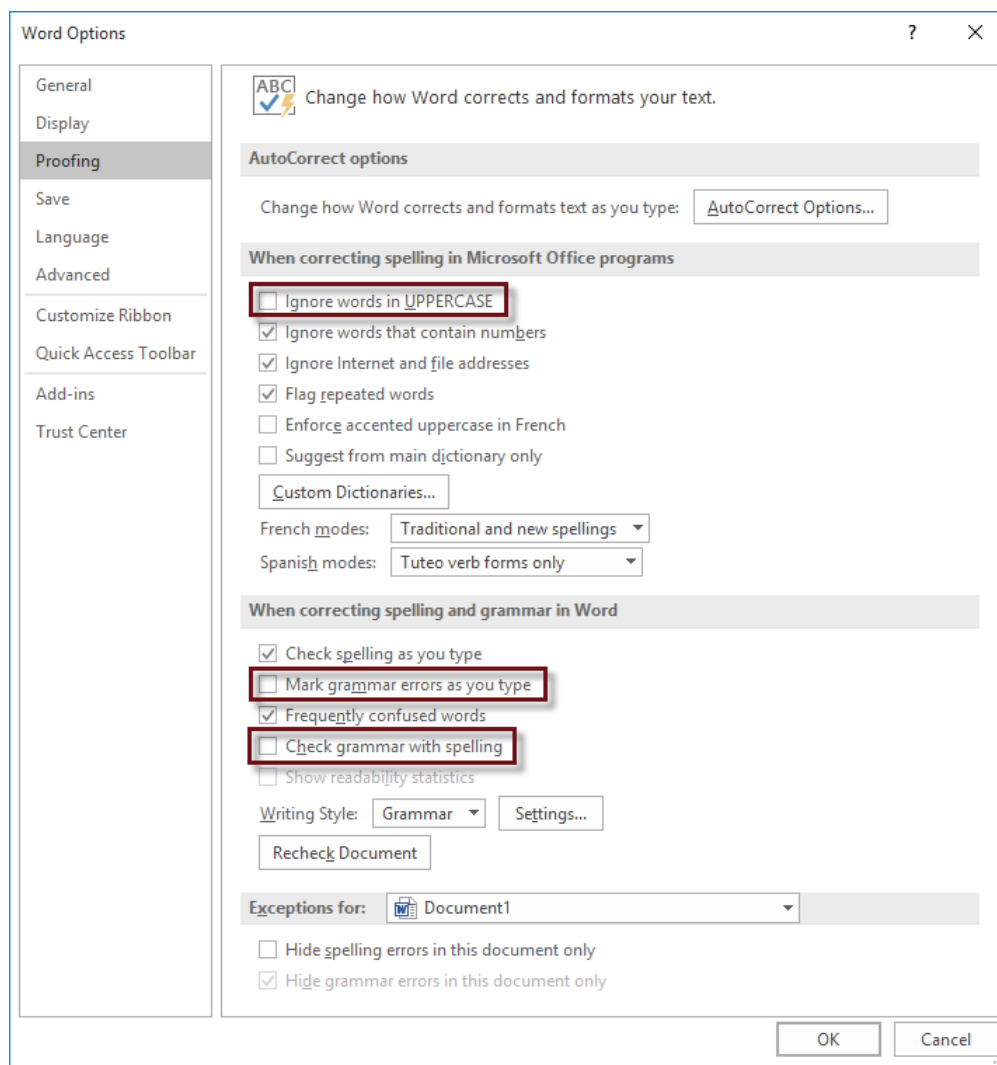
Options ➤ Proofing

FIGURE 1-4

- Uncheck **Ignore words in UPPERCASE**. Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.

- Uncheck **Mark grammar errors as you type**. This will eliminate the green squiggly lines in the document.

- Uncheck/Check **Check grammar with spelling**. Unchecking this options will speed up a spell check, if you are not concerned about checking grammar.

Options ➤ Proofing and Autocorrect

Next, go to **Proofing** and click on **Autocorrect Options** button. This will launch the **Autocorrect Options dialog**.
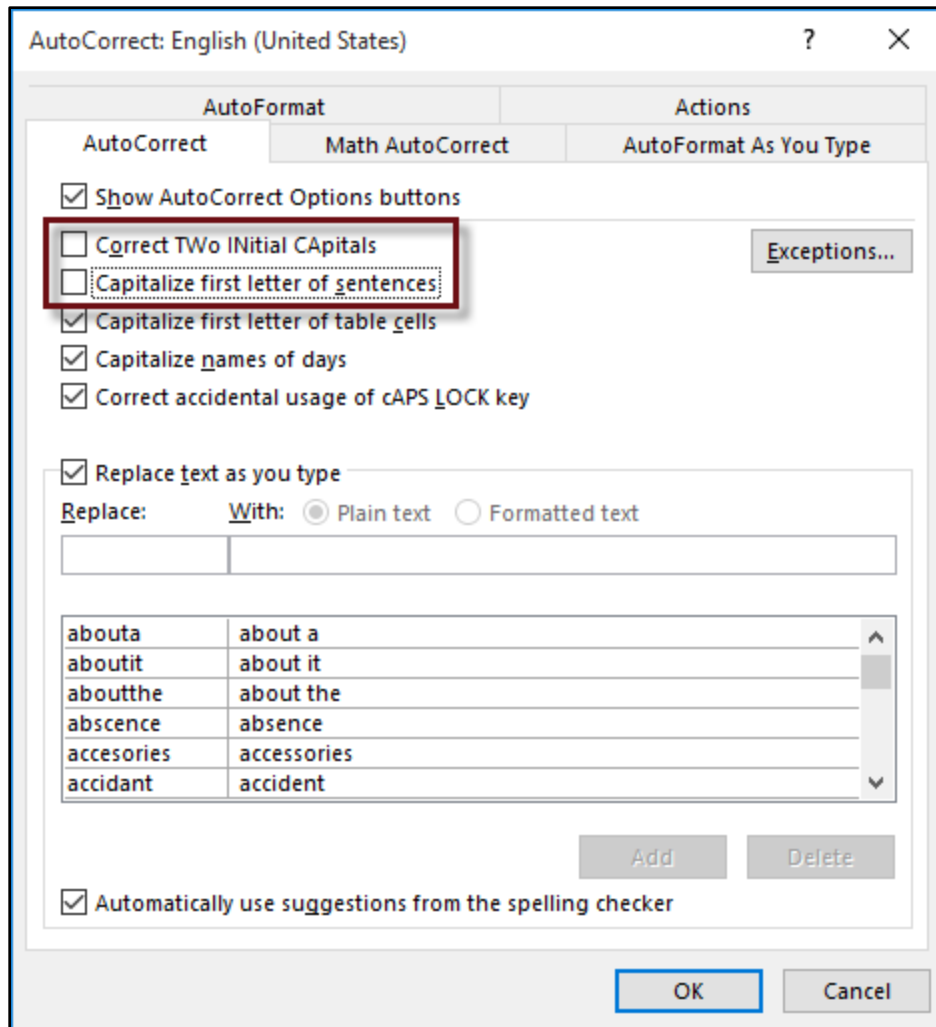
FIGURE 1-5

Uncheck **Correct TWo INitial CApitals** and **Capitalize first letter of sentences** as most people find that annoying because they MEANT to do it (IDs or cc:). **Note**: you can also delete the AutoCorrect entries in the list at the bottom of the dialog which replaces (c) with © and (r) with ®.

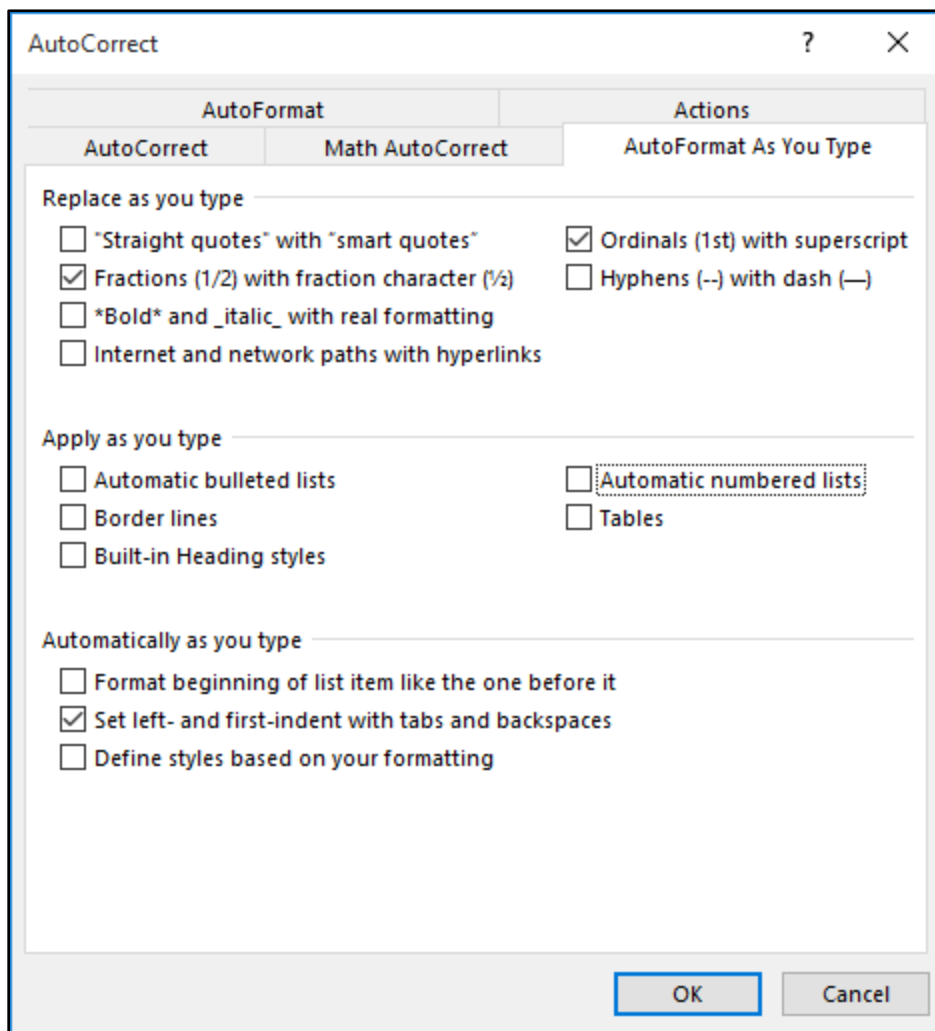Next click on the **AutoFormat As You Type** tab.

FIGURE 1-6

Uncheck everything except **Ordinals**, **Fractions** and **Set left and first indent with tabs and backspaces**. Optional items include checking **Internet and network paths with hyperlinks** will create clickable hyperlinks to internet addresses, so that a person opening the document can click on the link and go to the web address right from the document. You might also check the **Straight quotes with smart quotes** but keep in mind that this may result in your quotation marks getting converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

Be sure to uncheck everything else of this page!! The **Apply as you type section** causes Word to guess what is being typed and start inserting bulleted lists and tables on its own without any prompting to do so. Also be sure to uncheck **Define styles based on your formatting**. This option causes Word to create styles on its own.
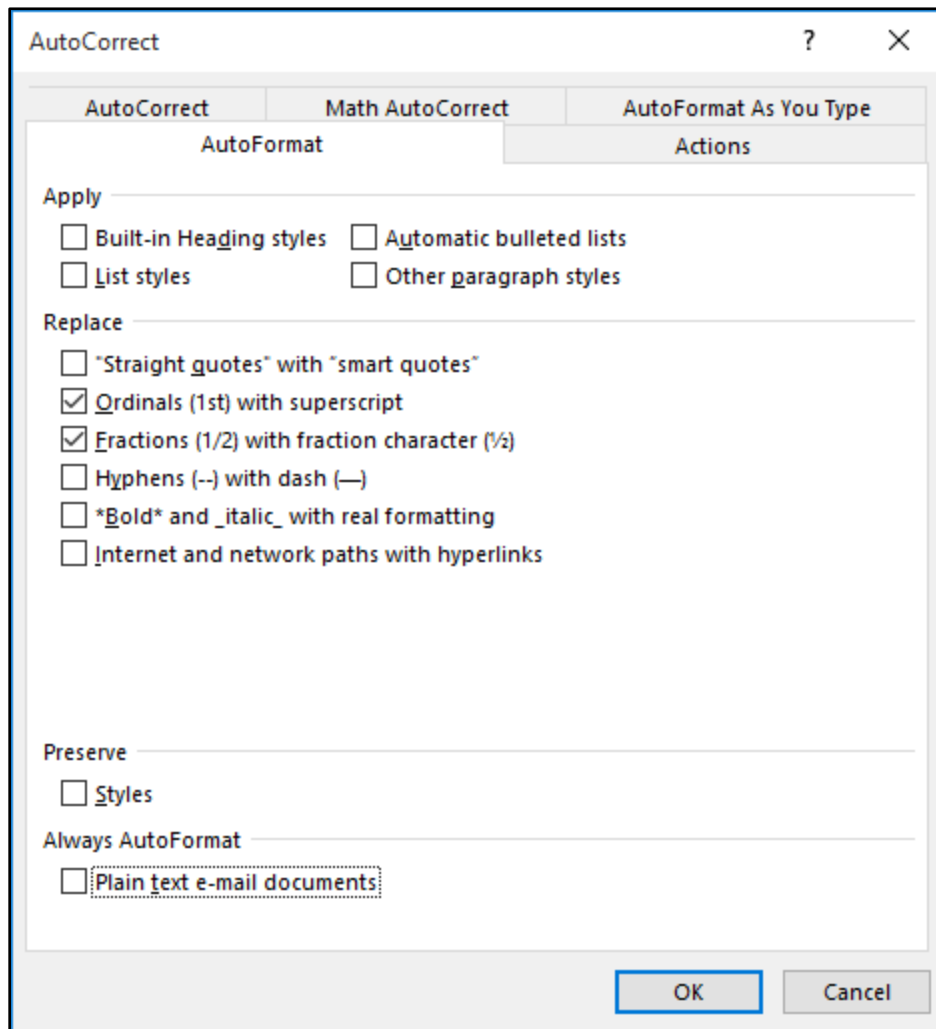
Finally, click on the **AutoFormat tab**.

FIGURE 1-7

Make these options match the **AutoFormat As You Type options**.

At this point, make sure to click the **OK** button or all of the changes will be lost.
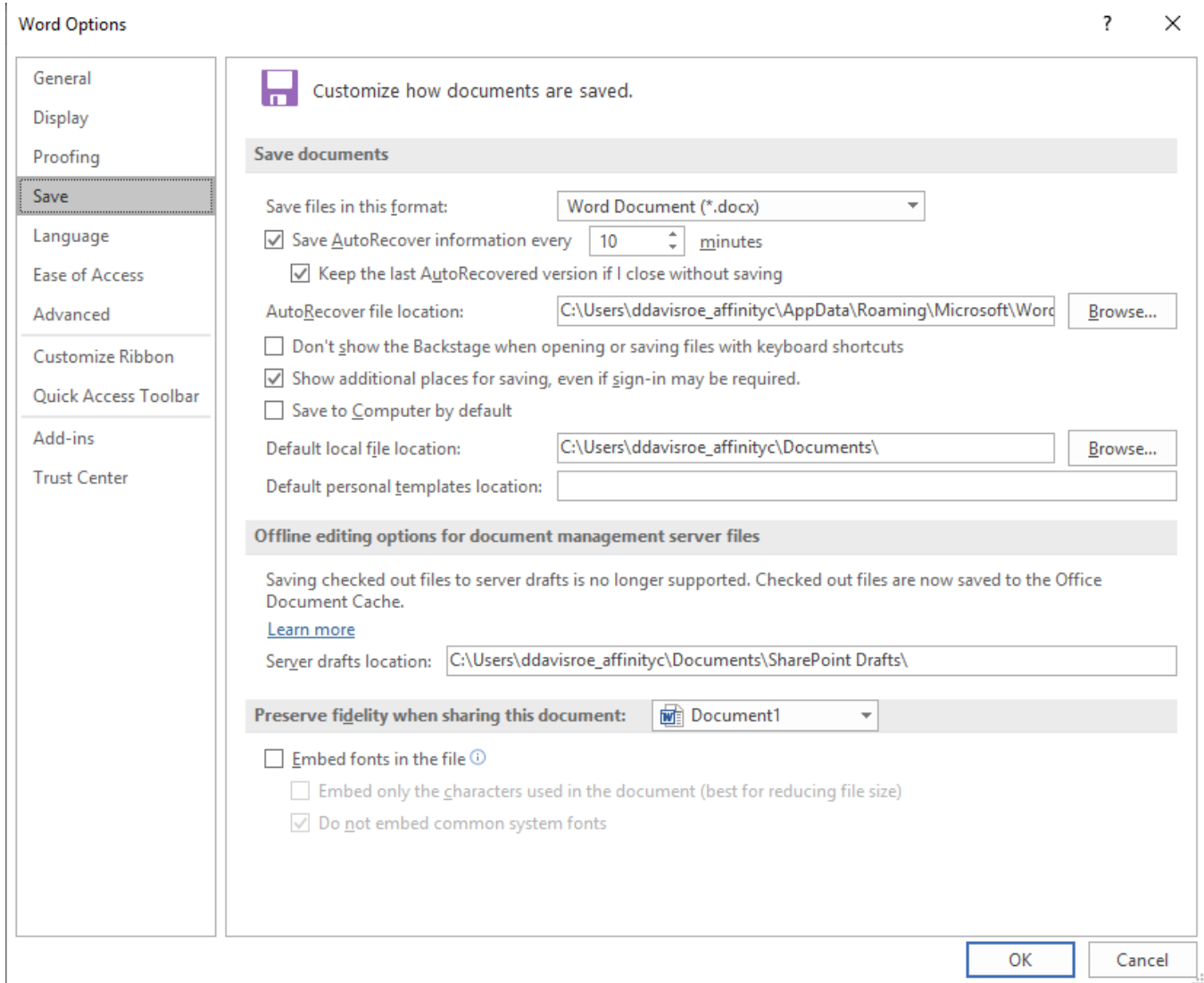
Options ➤ Save

FIGURE 1-8

- **Save AutoRecover information**: Reduce this to **5 minutes** rather than 10 minutes. More frequency is a good thing.

- **Don't show the Backstage when opening or saving files with keyboard shortcuts**: If you want Word to go directly to the open or save browse screens when you open or save a file using keyboard shortcuts (Ctrl + O and Ctrl + N), then check this box. There is no longer a setting to go directly to the open or save browse screens when clicking on the File menu.

- **Show additional places for saving, even if sign-in may be required**: This is just a waste of space on your save screen, so clear this box.

- **Save to Computer by default**: Microsoft really wants you to save everything to OneDrive and you probably don't want to. Therefore, check this box.
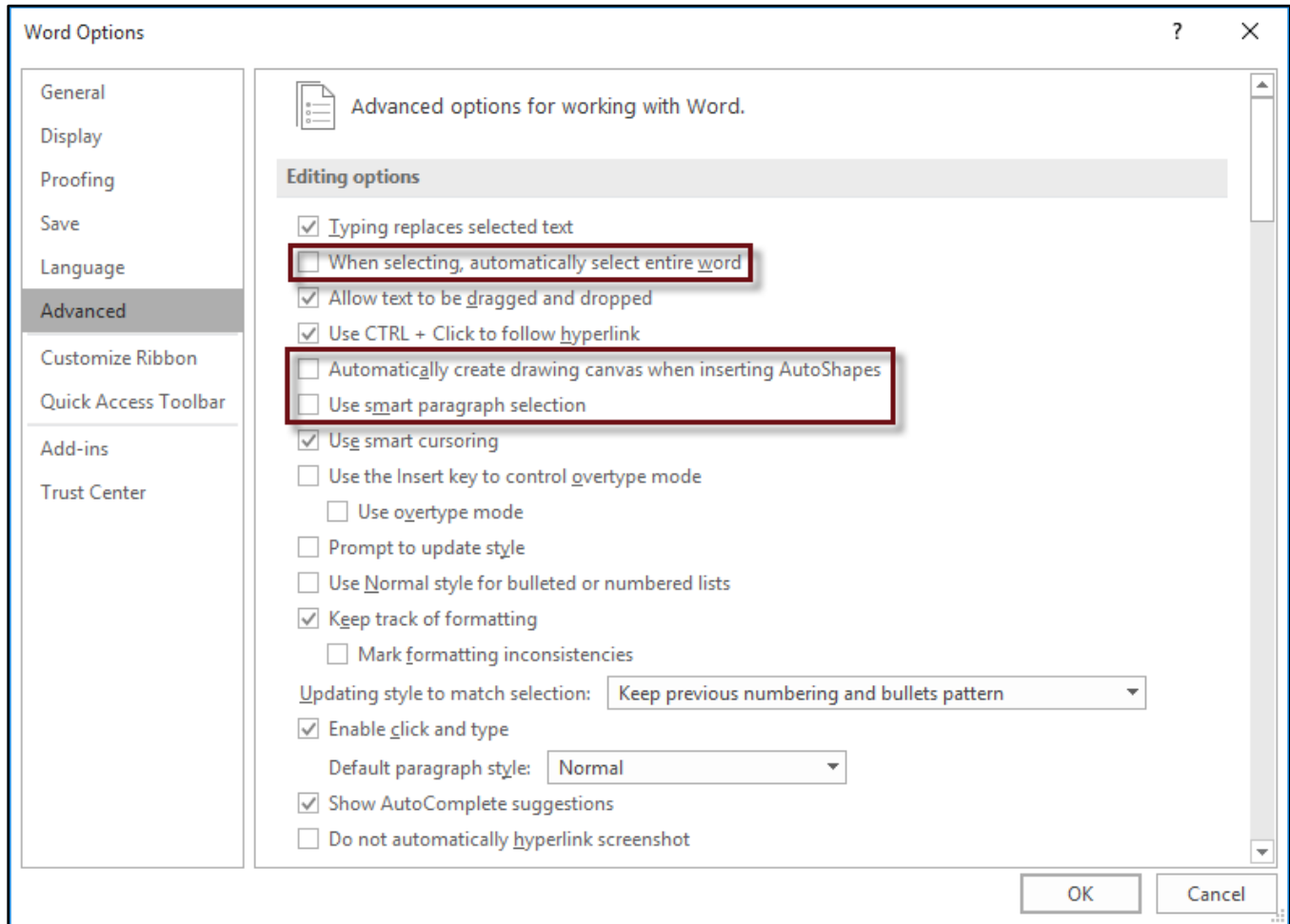
Options ➜ Advanced ➜ Editing Options

FIGURE 1-9

- Uncheck **When selecting, automatically select entire word.** Regain control over your mouse.

- Uncheck A**utomatically create drawing canvas when inserting AutoShapes**.

- Uncheck **Use smart paragraph selection**.

Some other items to watch out for are:

- Make sure **Typing replaces selected text** is checked. If not, you will not be able to overtype on top of a selected word

- **Use smart cursoring** moves the cursor when you scroll up or down through the document, this may or may not be what you want

- **Enable click and type,** in print layout, will format itself to place the text where you double click.

Options ➜ Advanced ➜ Cut, Copy and Paste

Note that in this area you can control the default paste action in a variety of circumstances. When copying from other programs (such as a browser), we recommend that you strip all formatting off of the source text. By changing the setting shown below, this will always be the case. You may want to change some of the other settings as well depending upon how you work.
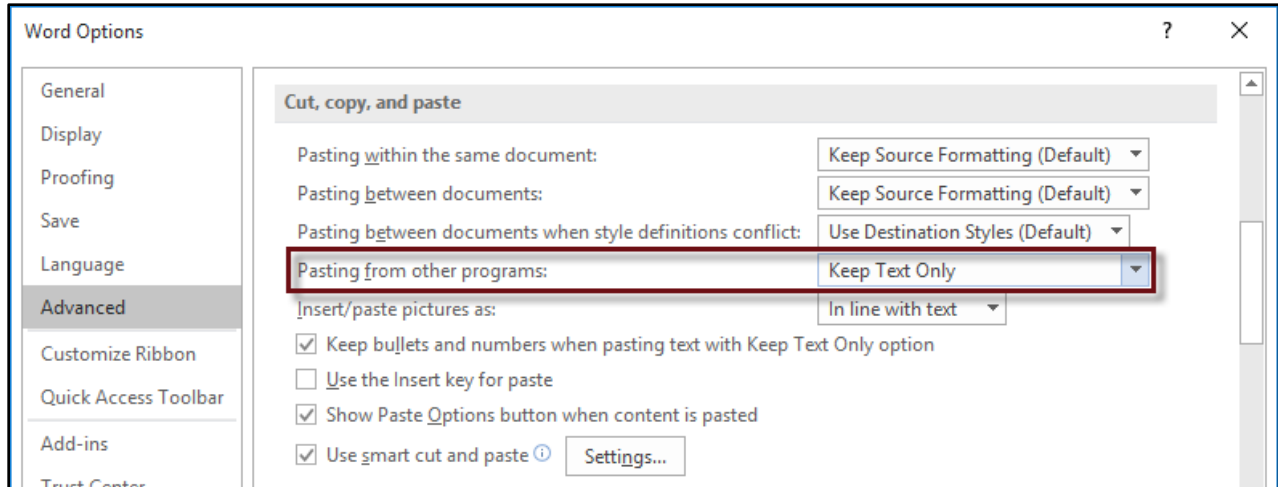

FIGURE 1-10

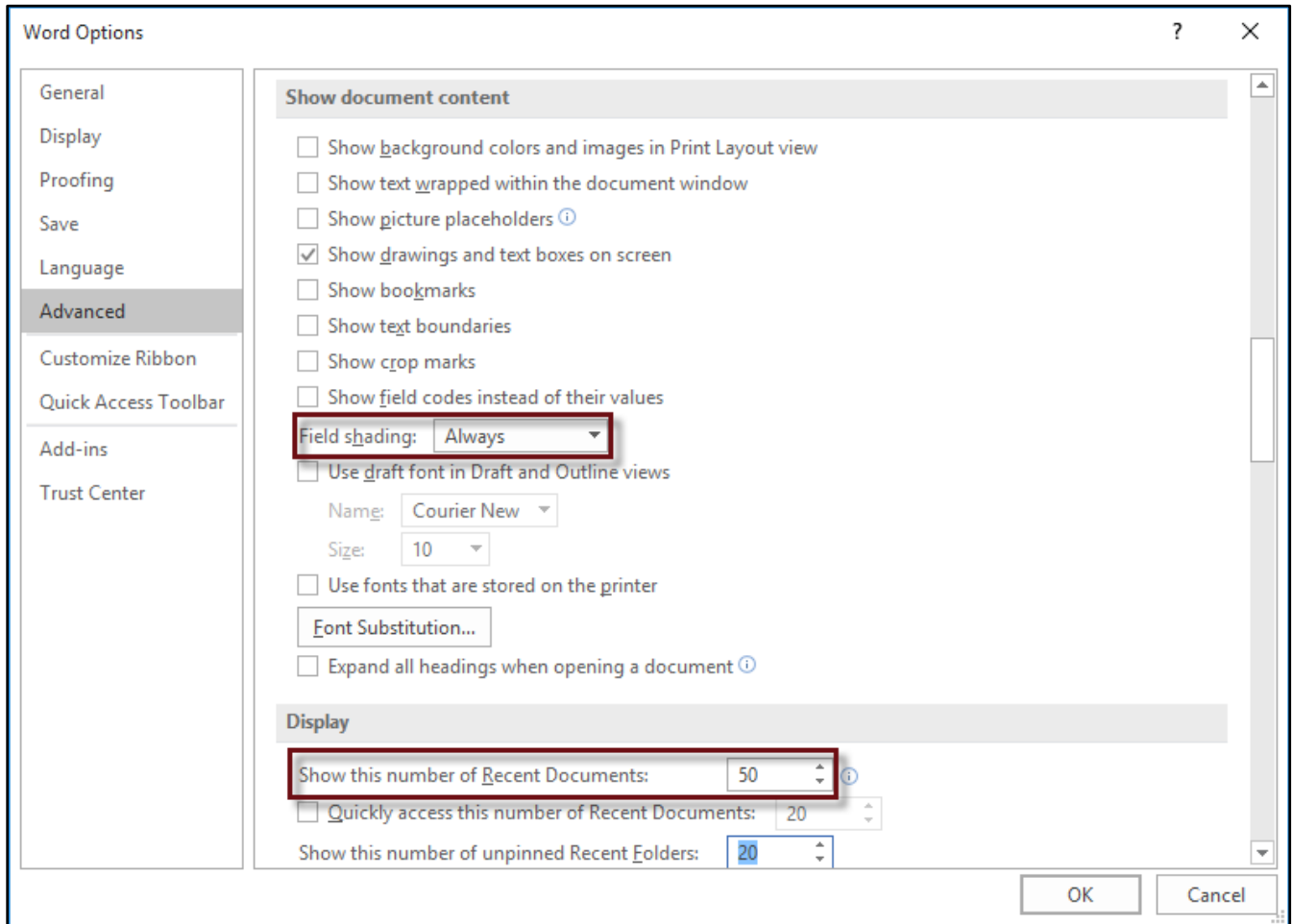# Options ➜ Advanced ➜ Show Document Content

FIGURE 1-11

- Change **Field shading** to **Always**.
- Change **Show this number of Recent Documents** to your preference.
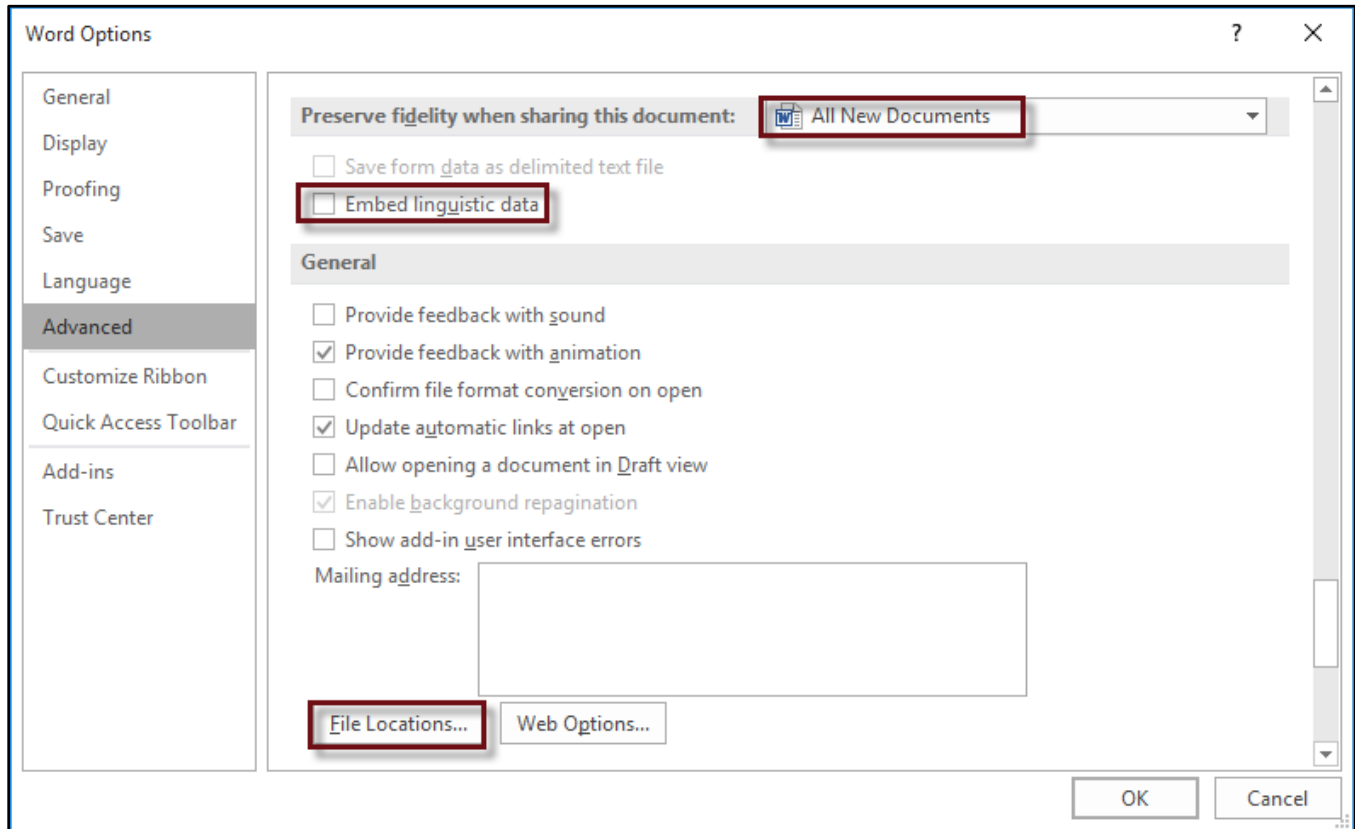
Options ➤ Advanced ➤ Fidelity & General

FIGURE 1-12

- Change the heading in **Preserve fidelity when sharing this document** to A**ll New Documents** (so the setting change applies to all future documents) and clear the **Embed linguistic data** box. "Linguistic data" refers to things like speech (from text-to-speech or speech-to-text applications or add-ins) and handwriting. You're probably not using either of those things so embedding them only makes the file-sizes bigger (unnecessarily).

- Click **File Locations** and make sure that Word is defaulted to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.
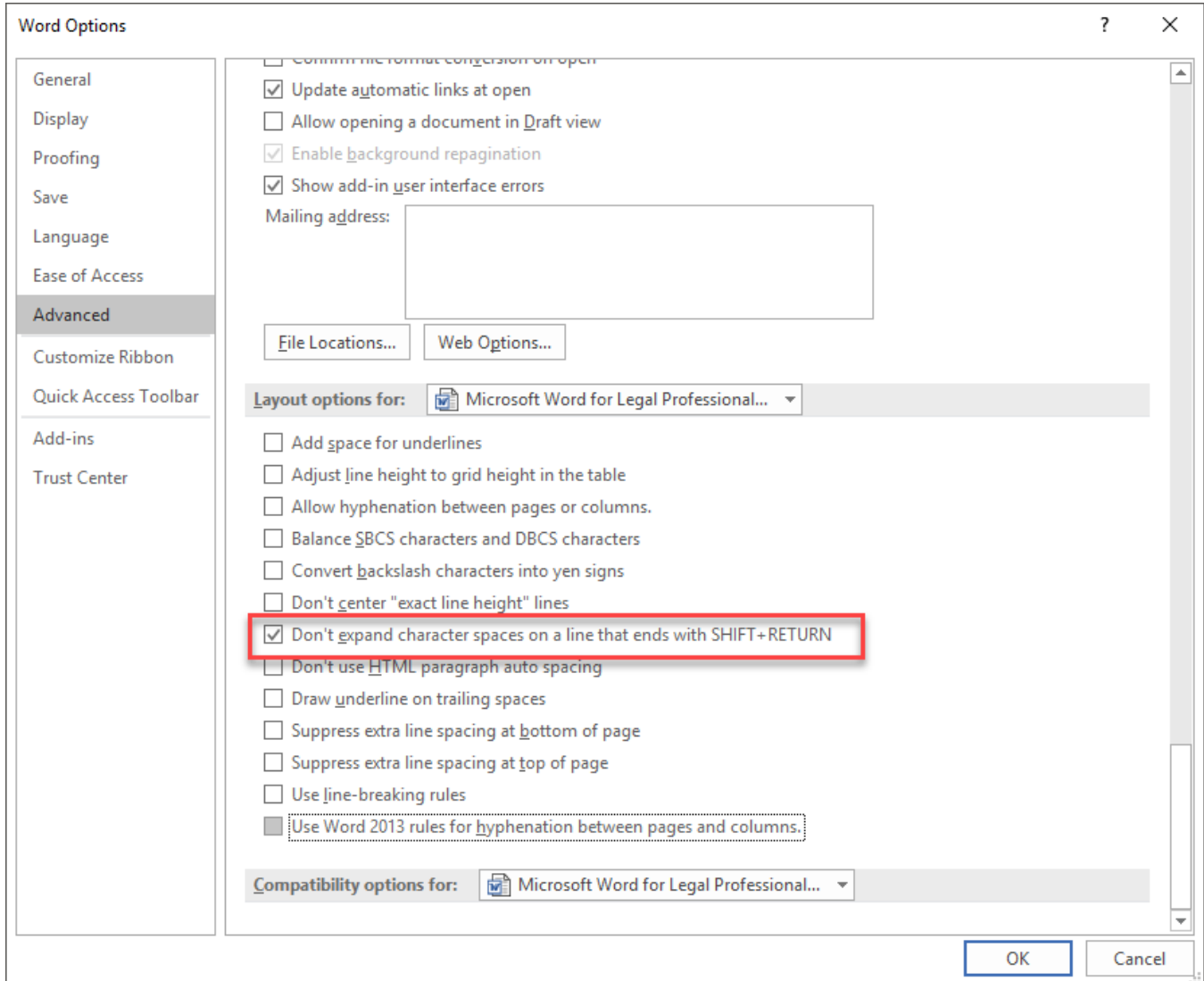
Options ➧ Advanced ➧ Layout Options

Check **Don't expand character spaces on a line that ends with SHIFT-RETURN** because this is the number one reason that a few words will be spread across the entire line with giant gaps between each word. For your information, Shift + Return = "soft return" which tricks Word into thinking that what appears to be two lines of text are actually one line of text.

Options ➧ Trust Center ➧ Trust Center Settings Button ➧ Protected View

By default Protected View is enabled. When enabled, Word displays a warning if the Word document was created on a different system. While the warning is displayed, the file may only be viewed, not edited. To edit the document, you must click the **Enable Editing button**.

Protected View disables all of the active content in the document and reduces the risk of infection from a worm, virus, or other malware that could be embedded in an unknown document.

If protected view bothers you, you may disable it. Yes, there is risk involved in disabling it. **You should check with your system administrator prior to unchecking these boxes**. To change these settings, go to **Protected View** and uncheck one or all of the boxes. See Figure 1-14.
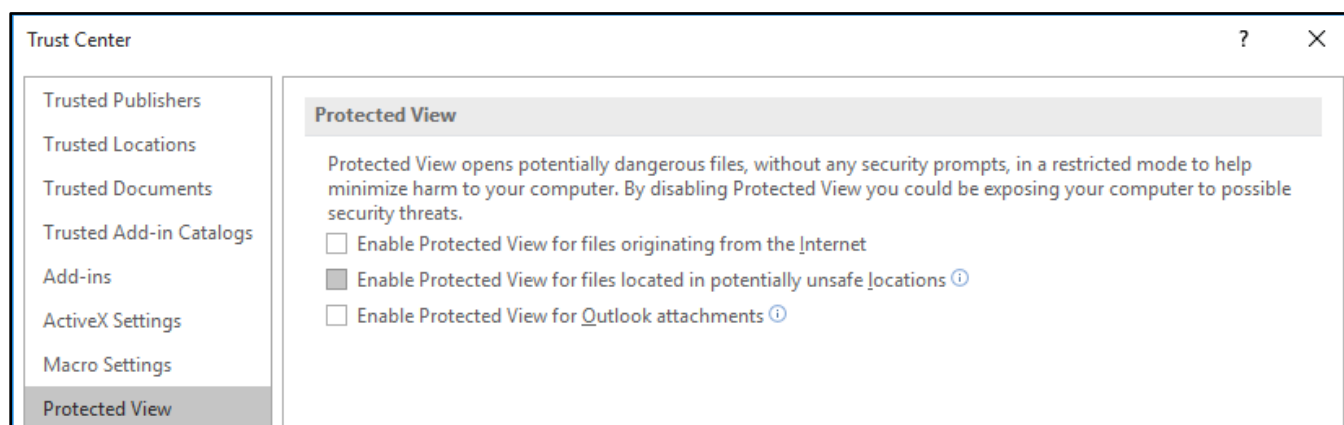

FIGURE 1-14

These boxes enable protected view, unchecking them disables the protection.

Enable Protected View for files originating from the Internet. This should probably remain checked. If you download a Word document from a web page, or anywhere else from the internet, you will probably want the Protected View protection.

Enable Protected View for files located in potentially unsafe locations. This is the main cause of triggering Protected View when opening a file from a network folder. You may disable this, but you may want to make your network server a "Trusted Location" instead. (See Trusted Location, below.) Unchecking this box also disables Protected View from other locations, such as USB thumb drives.

Enable Protected View for Outlook attachments. With this checked, you will receive a protected view warning for every Word document that you open as an attachment from Outlook. Unchecking this box turns off the protection.

NOTE: In addition to these settings, Windows may "block" Outlook attachments that you save to your file system. To unblock them, you must right-click the file, select **Properties**, check the **Unblock box** (on some systems this appears as a button instead of a checkbox), and click **OK**:
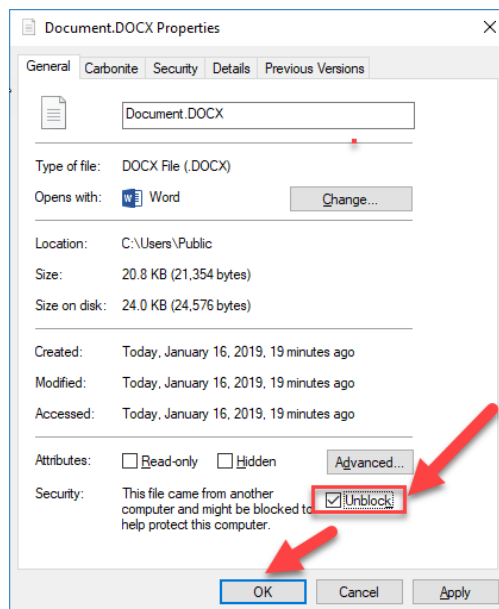
FIGURE 1-15

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Trusted Locations

Trusted Locations are for folders on your system or on your network that you trust. Adding a folder or network share as a Trusted Location completely disables all of the Trust Center checks and protections for that location. To add a folder such as "N:\Client Files" as Trusted Location:

1. Go to File ➔ Options ➔ Trust Center ➔ Trust Center Settings ➔ Trusted Locations.

2. Check the **Allow Trusted Locations on my network**. You will not be able to enter a network location without checking this box.

3. Click **Add new location**, enter the path of the folder and check **Subfolders of this location are also trusted**. Then click **OK** and **OK**. All documents in that folder will now be trusted, and the Trust Center will no longer check them.

FIGURE 1-16

Options ➜ Trust Center ➜ Trust Center Settings Button ➜ File Block Settings

File Block Settings will trigger Protected View for all files of a particular type regardless of where they are located. Again, there is risk involved in disabling this feature. **Check with your system administrator before unchecking these boxes**. In particular, there have been prior issues with RTF files.

To have all file types open and allow editing without a prompt, under the **File Block Settings**, uncheck all of the check boxes and under **Open behavior for selected filed types**, select **Open selected file types in Protected View and allow editing**. See Figure 1-17

FIGURE 1-17

Options ➔ Trust Center ➔ Trust Center Settings Button ➔ Privacy Options
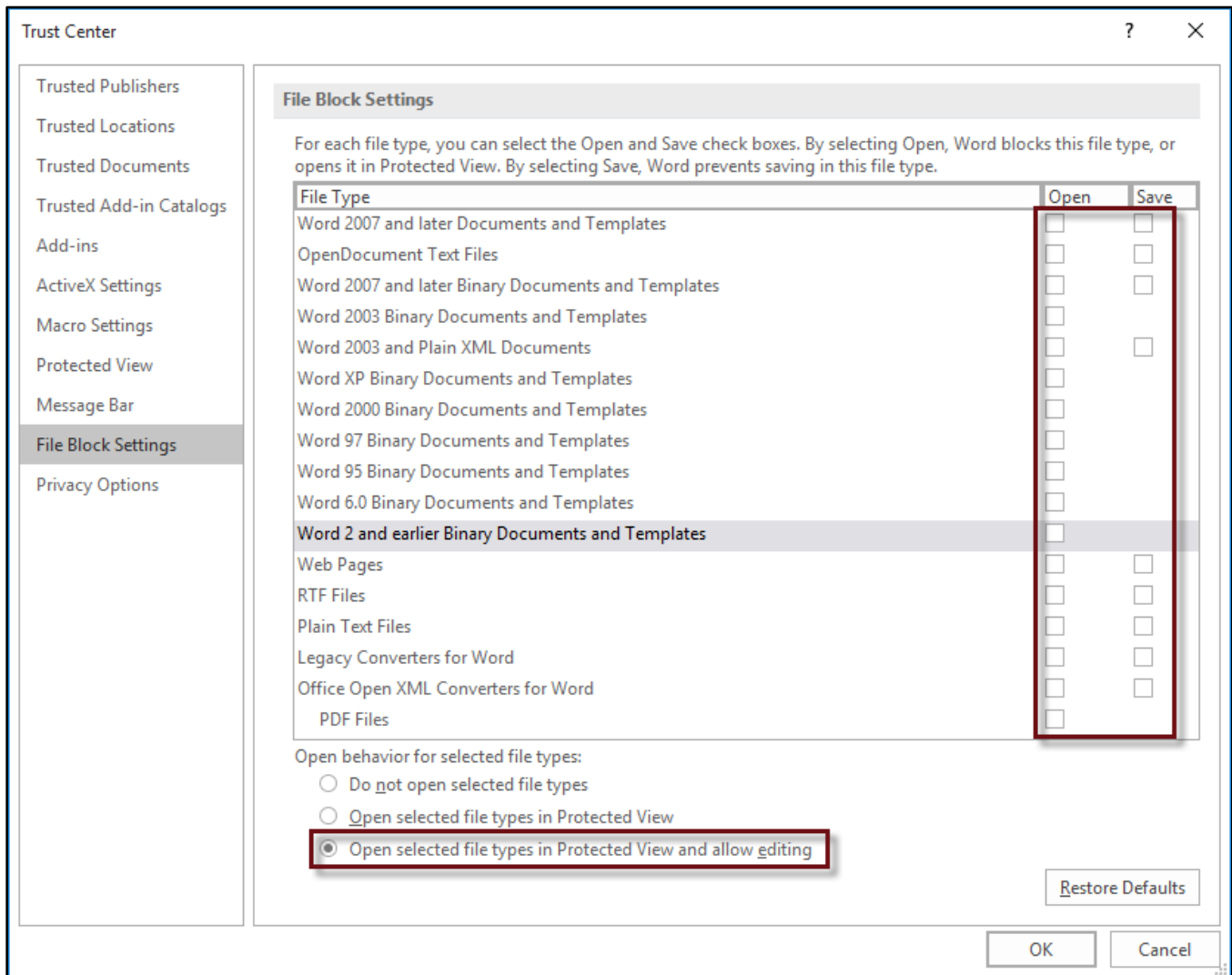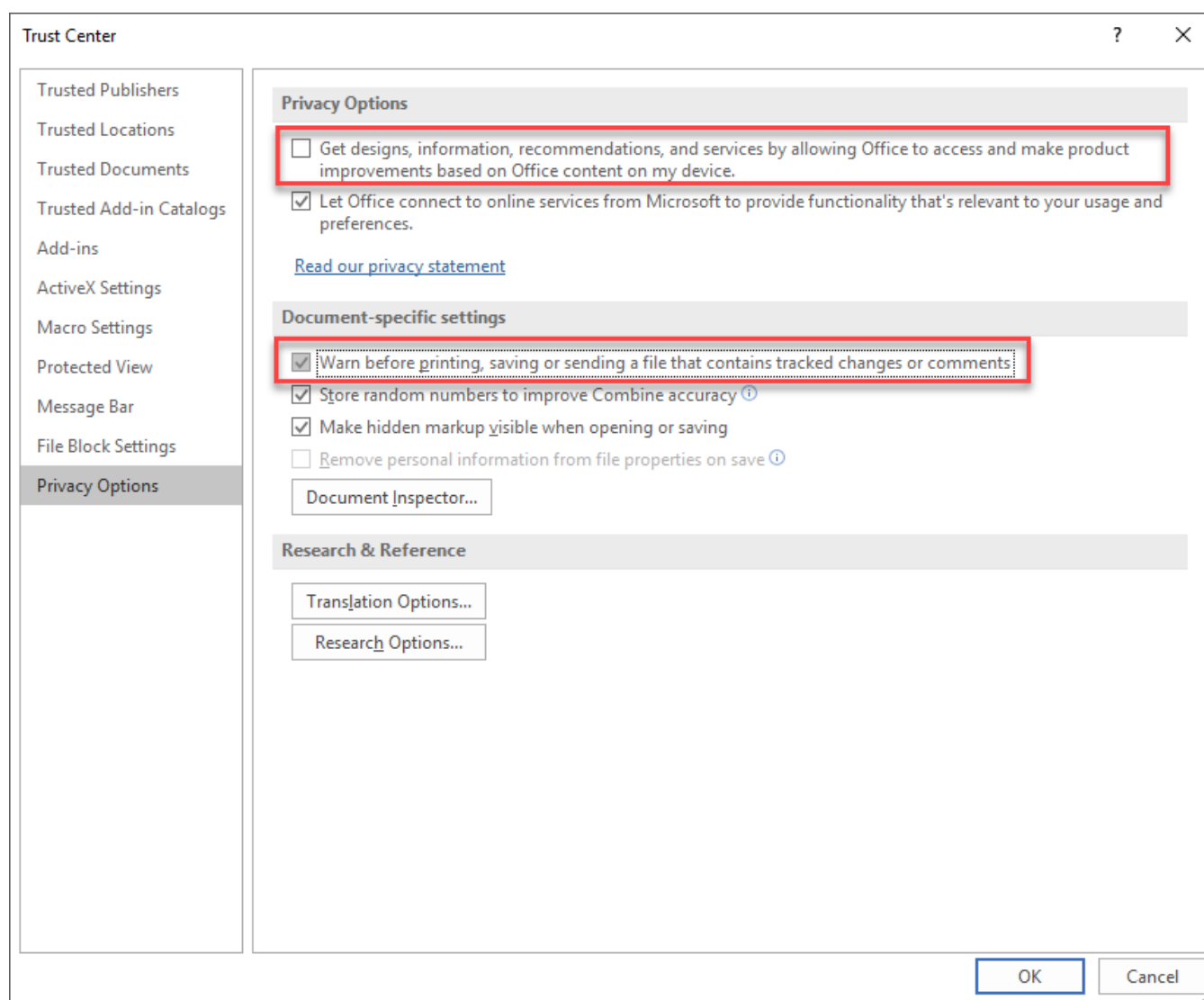

FIGURE 1-18

Go to the **Trust Center** and click the **Trust Center Settings button**. A new dialog will open. Click on **Privacy Options** and check **Warn before printing, saving or sending a file that contains tracked changes or comments**. Also clear the **Send personal information to Microsoft to make improvements to Office**.

Lock In Your Setting Changes

Make sure that after you're doing with all of the foregoing changes that you click the **OK** button, **NOT Cancel** and **NOT** the **X button** in the top, right-hand corner of the dialog. That makes the changes stick. It's a good idea after you do this to exit Word, re-launch Word and spot check a couple of the settings to ensure that they're still modified. If the changes don't stick, there are a couple of reasons that could happen and I can help you figure out why. Just send me an email - info@affinityconsulting.com.

Fix Track Changes Settings

There are a few changes you'll want to make to the Track Changes defaults. All of these changes begin on the **Review ribbon** in Word 2016.

Change the Markup

By default, Word shows you **Simple Markup** which means that if you delete text, it literally disappears and a little red, vertical line appears in the left margin adjacent to the line where something was deleted. Of course, I not only want to know that something was deleted, but *what* was deleted. Therefore, switch from **Simple Markup** to **All Markup** (see below).

FIGURE 1-19

Track Changes Options

In order to get to this dialog, click **Review ribbon ⏐Tracking launcher**.
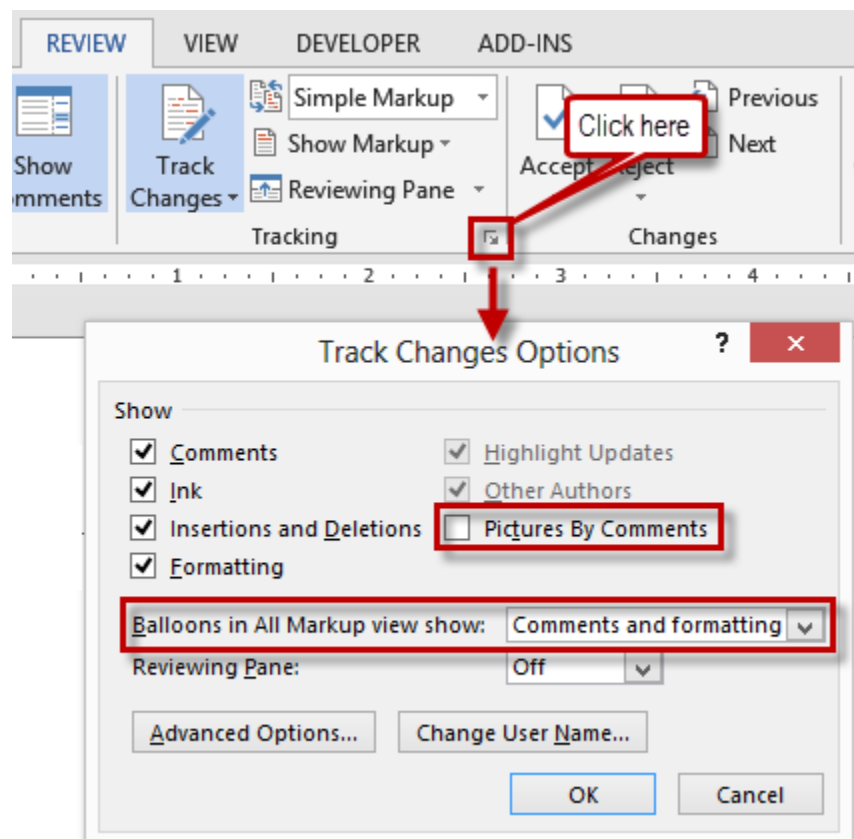
FIGURE 1-20

- Clear **Pictures By Comments** (unnecessary and clutters up the comment screen).
- **Balloons are best used for Comments and Formatting only**: not Revisions which is the default setting.

CHAPTER 2
DEFAULT SETTING CHANGES FOR WORD FOR MICROSOFT 365/2021

In General

NOTE that you get to all of the following screens by clicking the **File menu ➜ Options button.**

Options ➜ General

FIGURE 2-1

- **Show Mini Toolbar on selection**: This controls whether the mini toolbar appears when selecting text. Uncheck this box to prevent the mini toolbar from popping up and covering part of the document.

FIGURE 2-2

- Make sure your name and initials are in the **Username** and **Initials boxes**. Check **Always use these values regardless of sign in to Office** to use the values entered despite how your Office account may be setup.

- **Office Background**: the background a graphic that appears at the top, right-hand corner of the Word screen. Most users select **No Background**.
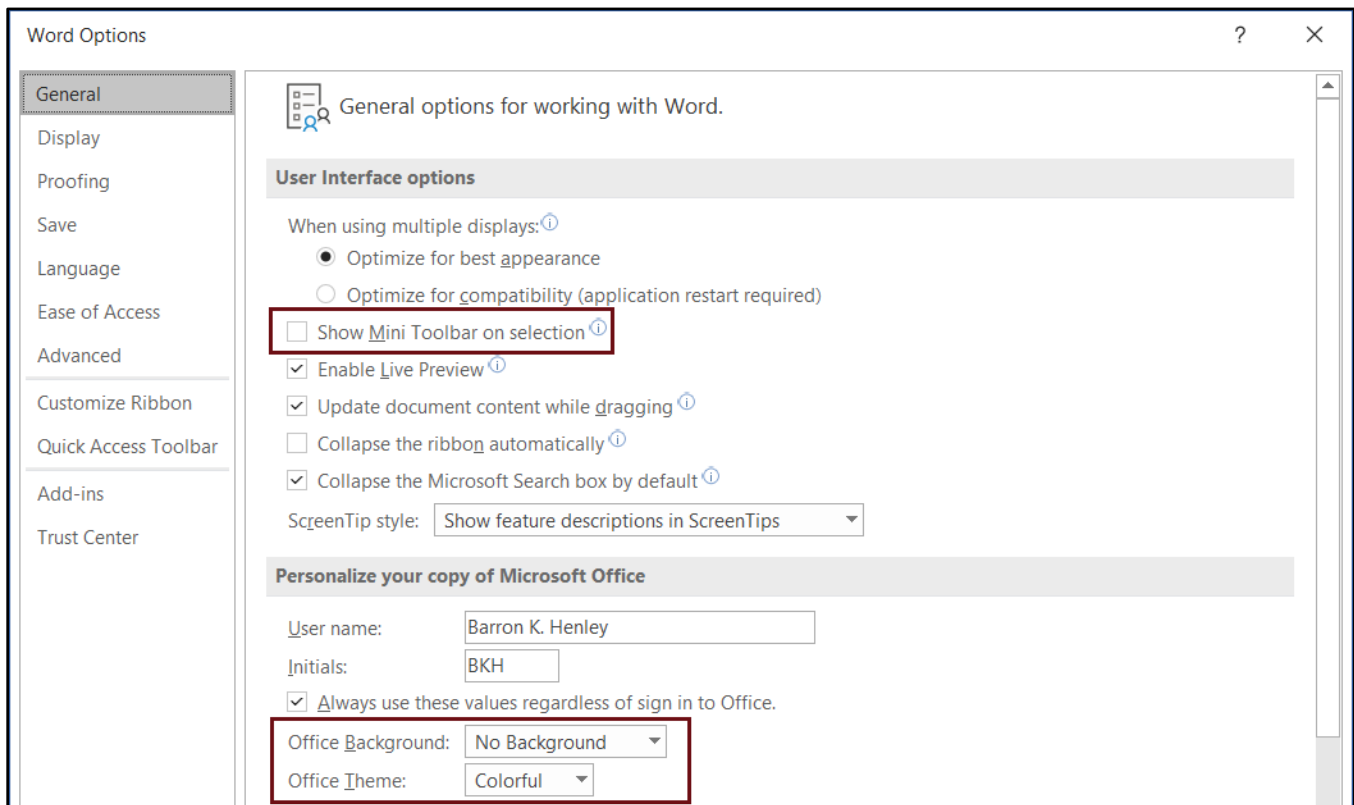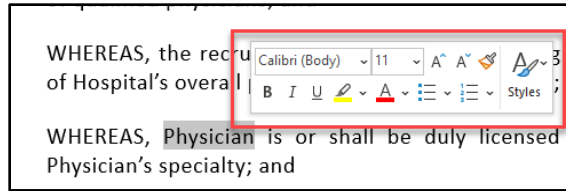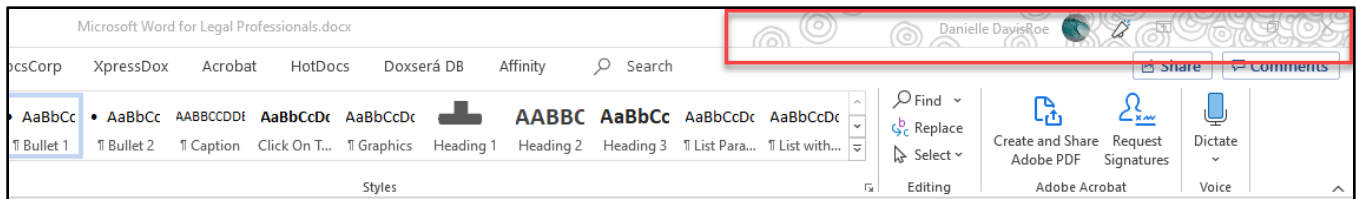

FIGURE 2-3

- **Office Theme: White**, **Dark Gray**, and **Black** change the bulk of the screen to the corresponding color. **Colorful** changes the bar across the top to the color associated with that program (blue for Word and Outlook, green for Excel, etc.).
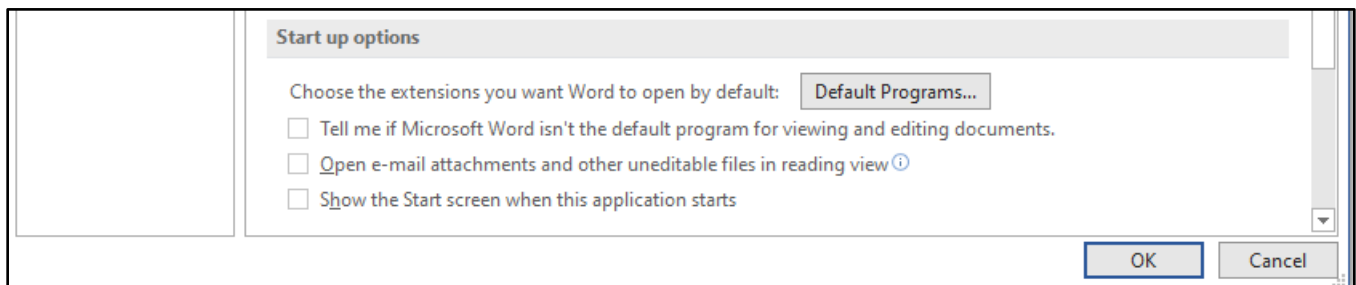
FIGURE 2-4

- **Tell me if Word isn't default program for viewing and editing documents**: When checked, if another program is set as your default program for editing documents, Word will alert you when opening Word. If you'd prefer not to receive such an alert, uncheck this box.

- **Open e-mail attachments in Reading View**: When checked, Word documents attached to emails will open in Reading View. If you do not like the reading view, uncheck this box.

- **Show the Start screen when this application starts**: If checked, this is the reason you see the templates and previously used document list when you launch Word. If you'd prefer to go directly to a new blank document when you launch Word (which is how previous versions worked), then uncheck this box.

A. BIG BAD'S BRIEF DEMONSTRATES THAT REASONABLE MINDS, CONSTRUING THE EVIDENCE MOST FAVORABLY TOWARD PLAINTIFF, CAN REACH DIFFERENT CONCLUSIONS ON THE ISSUE OF OCCUPANCY AND CONTROL.

Big Bad's Brief in this case proves the point of this appeal: Reasonable minds can differ on whether Big Bad (1) occupied or controlled the premises in question and (2) on whether "special circumstances" existed to render Big Bad liable.

1. BY REFERENCE ONLY TO THE LEASE, REASONABLE MINDS CAN DIFFER OVER WHETHER BIG BAD OCCUPIED OR CONTROLLED THE PREMISES

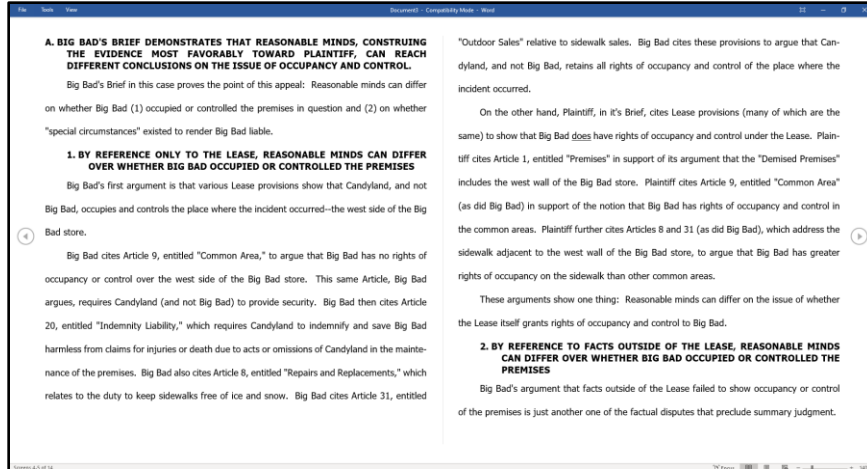Big Bad's first argument is that various Lease provisions show that Candyland, and not Big Bad, occupies and controls the place where the incident occurred--the west side of the Big Bad store.

Big Bad cites Article 9, entitled "Common Area," to argue that Big Bad has no rights of occupancy or control over the west side of the Big Bad store. This same Article, Big Bad argues, requires Candyland (and not Big Bad) to provide security. Big Bad then cites Article 20, entitled "Indemnity Liability," which requires Candyland to indemnify and save Big Bad harmless from claims for injuries or death due to acts or omissions of Candyland in the maintenance of the premises. Big Bad also cites Article 8, entitled "Repairs and Replacements," which relates to the duty to keep sidewalks free of ice and snow. Big Bad cites Article 31, entitled

"Outdoor Sales" relative to sidewalk sales. Big Bad cites these provisions to argue that Candyland, and not Big Bad, retains all rights of occupancy and control of the place where the incident occurred.

On the other hand, Plaintiff, in it's Brief, cites Lease provisions (many of which are the same) to show that Big Bad does have rights of occupancy and control under the Lease. Plaintiff cites Article 1, entitled "Premises" in support of its argument that the "Demised Premises" includes the west wall of the Big Bad store. Plaintiff cites Article 9, entitled "Common Area" (as did Big Bad) in support of the notion that Big Bad has rights of occupancy and control in the common areas. Plaintiff further cites Articles 8 and 31 (as did Big Bad), which address the sidewalk adjacent to the west wall of the Big Bad store, to argue that Big Bad has greater rights of occupancy on the sidewalk than other common areas.

These arguments show one thing: Reasonable minds can differ on the issue of whether the Lease itself grants rights of occupancy and control to Big Bad.

2. BY REFERENCE TO FACTS OUTSIDE OF THE LEASE, REASONABLE MINDS CAN DIFFER OVER WHETHER BIG BAD OCCUPIED OR CONTROLLED THE PREMISES

Big Bad's argument that facts outside of the Lease failed to show occupancy or control of the premises is just another one of the factual disputes that preclude summary judgment.
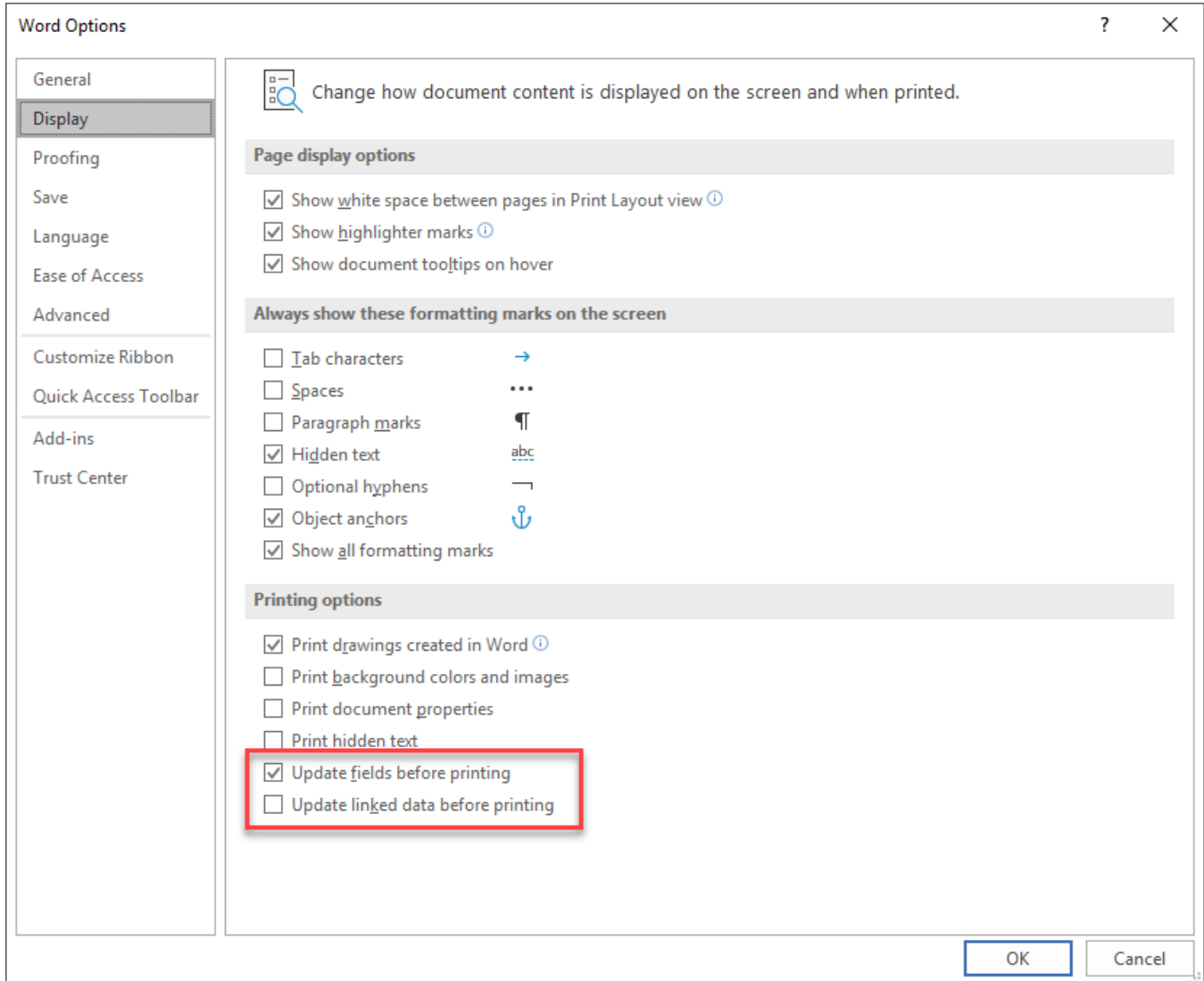
FIGURE 2-5

Options ➜ Display

FIGURE 2-6

- **Update fields before printing**: Check this box to ensure that all tables of contents and cross references are updated prior to printing the document.

- **Update linked data before printing**: This will make sure that all linked files are updated before printing.
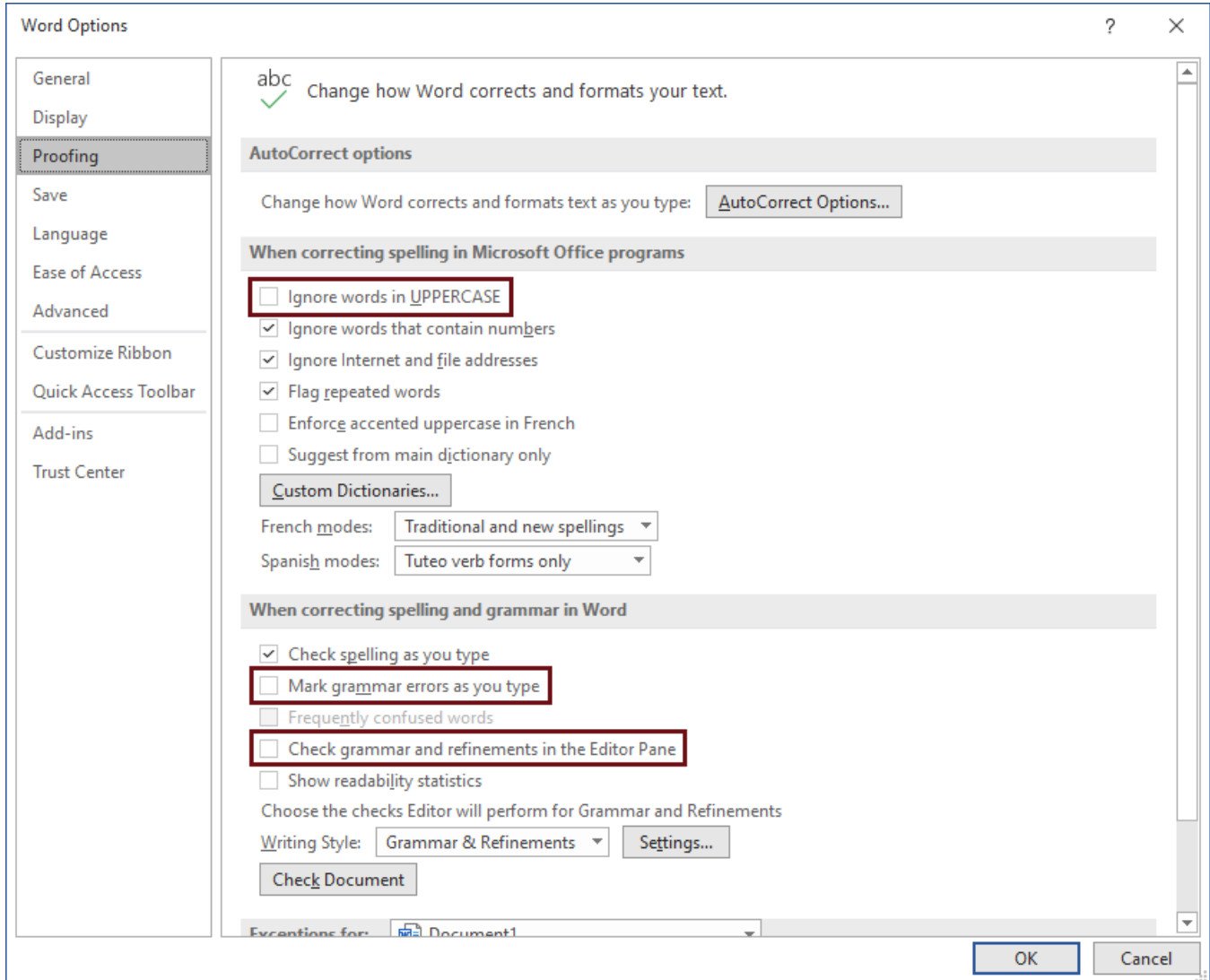
Options ➜ Proofing

FIGURE 2-7

- **Ignore words in UPPERCASE. Uncheck this box.** Leaving this checked will cause Word to ignore anything in uppercase such as headings and titles.

- **Mark grammar errors as you type**. When checked, Word checks your grammar as you type and notes any perceived grammatical errors with green squiggly lines. Uncheck this box to eliminate the green squiggly lines in the document.

- **Check grammar and refinements in the Editor Pane**. If you find Word's grammar checker to be annoying, or you are using another grammar add-in such as grammarly.com, you may want to uncheck this box as well.

Options ➜ Proofing and Autocorrect

Under **Proofing**, click on the **Autocorrect Options** button.
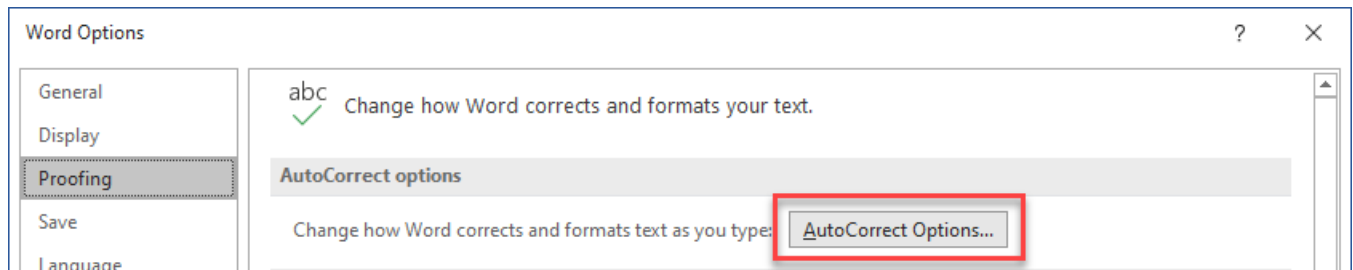
AutoCorrect
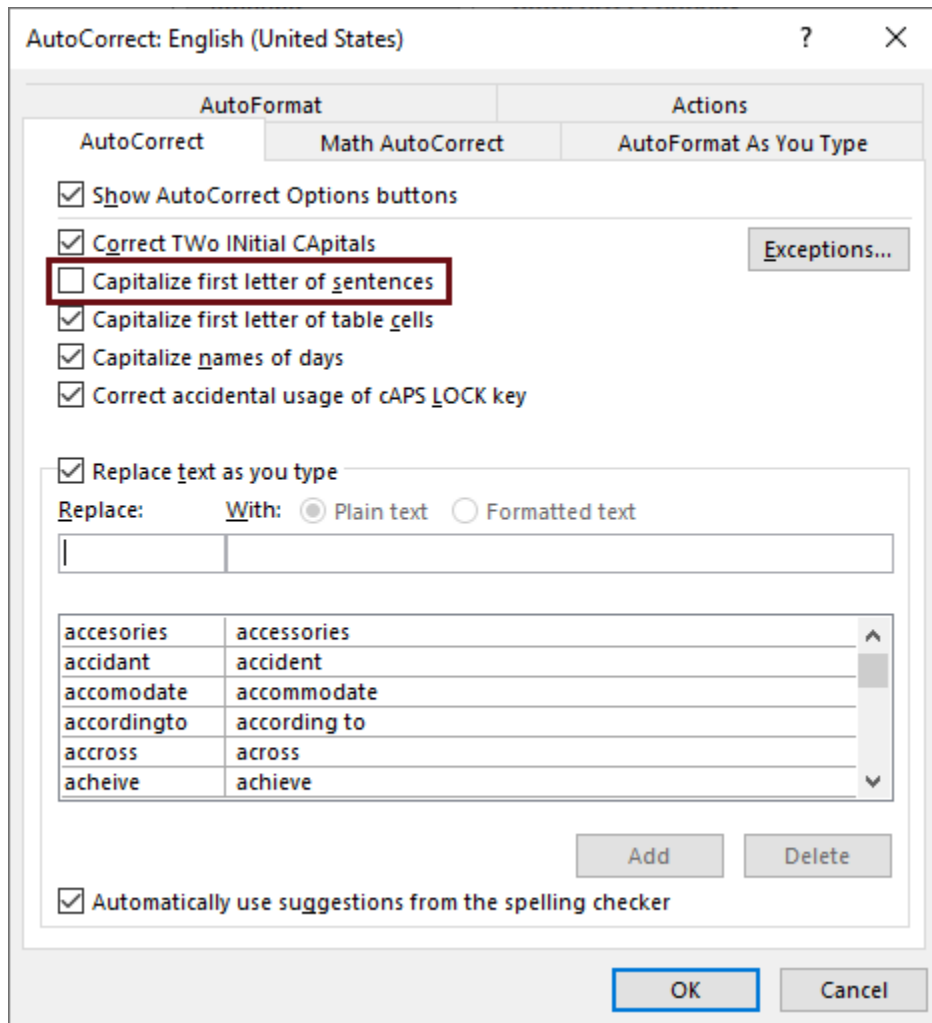
FIGURE 2-8

- **Capitalize first letter of sentences**: When checked, Word automatically capitalizes the first word of each sentence and paragraph. For example, when typing "cc:" on a new line, Word will correct it to "Cc:." If you would prefer for Word to stop correcting the first letter, uncheck this box.

- **Capitalize first letter of table cells**: Likewise, when checked, Word automatically capitalizes the first letter of the first word in a table cell. If you would prefer for Word to stop doing so, uncheck this box.
- **AutoCorrect Entries People Complain About**: You probably also want to delete the AutoCorrect entries in the list at the bottom of the dialog which replace (c) with © and (r) with ®.

AutoFormat As You Type
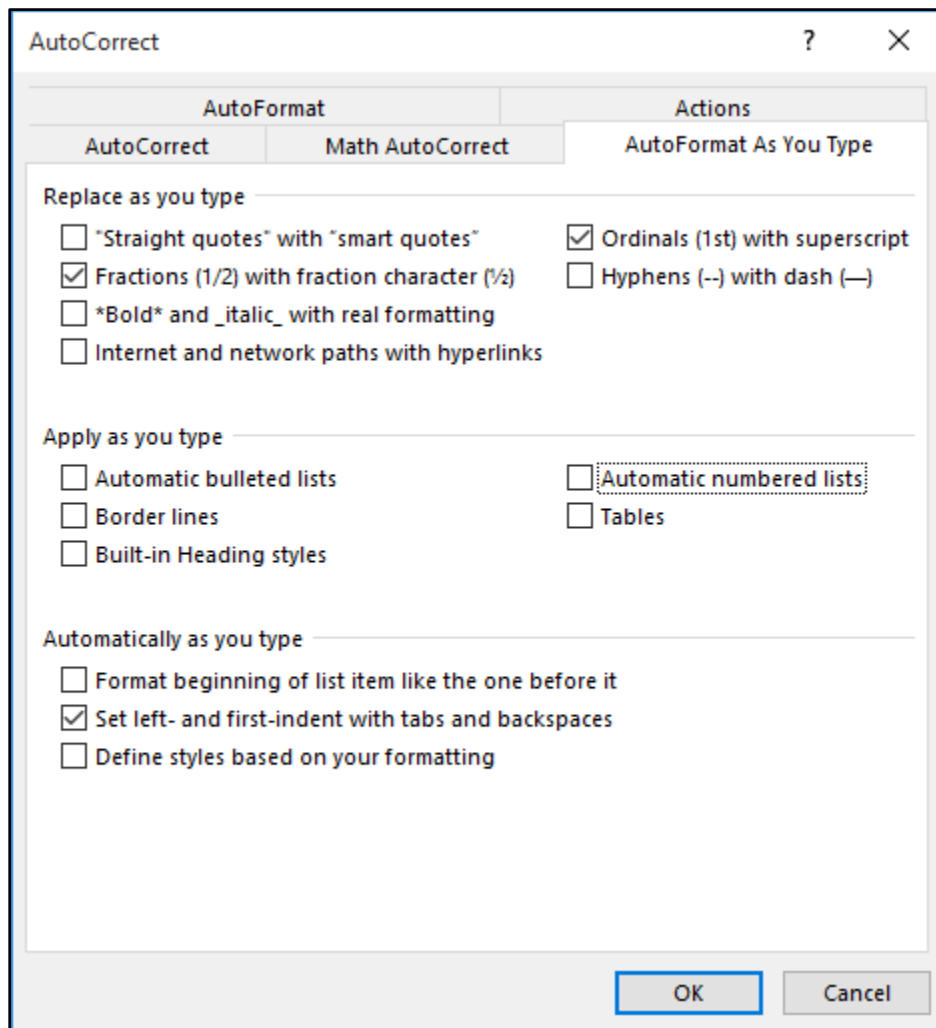
FIGURE 2-9

Uncheck everything except **Ordinals**, **Fractions** and **Set left and first indent with tabs and backspaces**. Optional items include checking **Internet and network paths with hyperlinks** will create clickable hyperlinks to internet addresses, so that a person opening the document can click on the link and go to the web address right from the document. You might also check the **Straight quotes with smart quotes** but keep in mind that this may result in your quotation marks getting converted to "A" and "@" if the person opening your document doesn't have the same font set that you have on your computer.

Be sure to uncheck everything else of this page!! The **Apply as you type section** causes Word to guess what is being typed and start inserting bulleted lists and tables on its own without any

prompting to do so. Also be sure to uncheck **Define styles based on your formatting**. This option causes Word to create styles on its own.
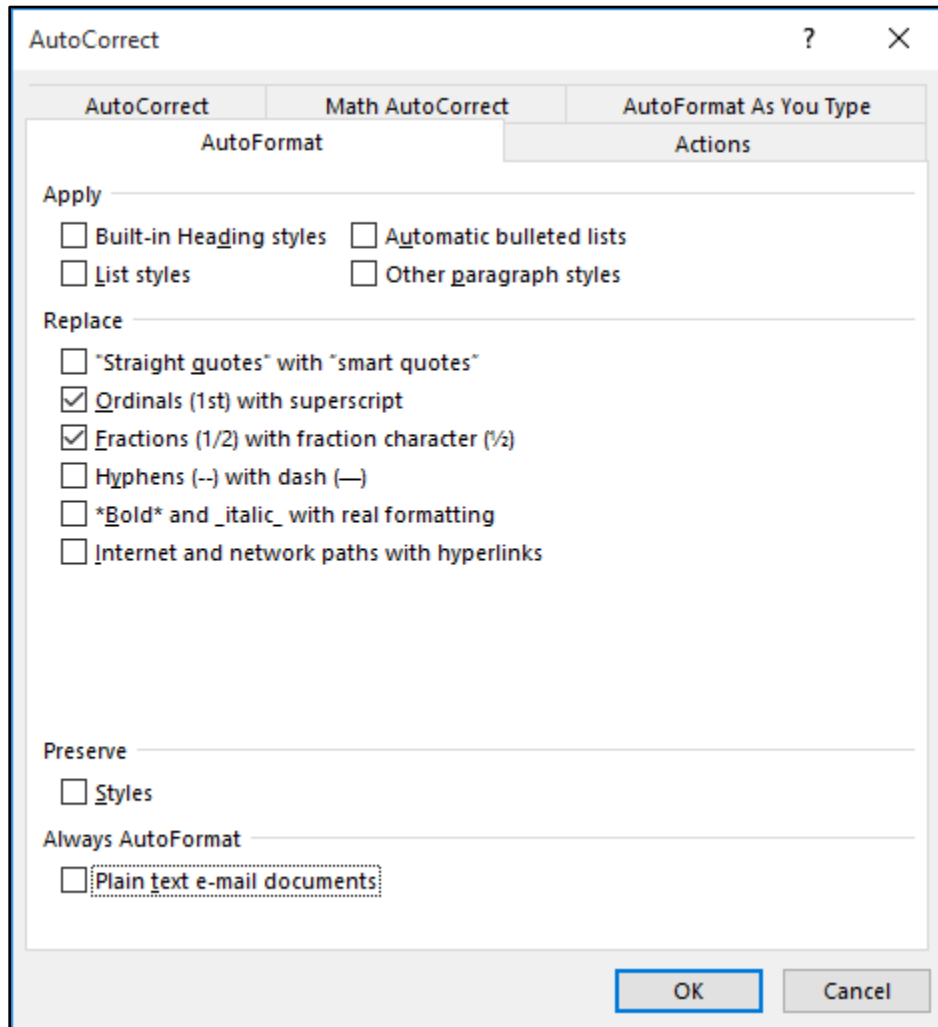
Finally, click on the **AutoFormat tab**.

FIGURE 2-10

Make these options match the **AutoFormat As You Type options**.

At this point, make sure to click the **OK** button or all of the changes will be lost.
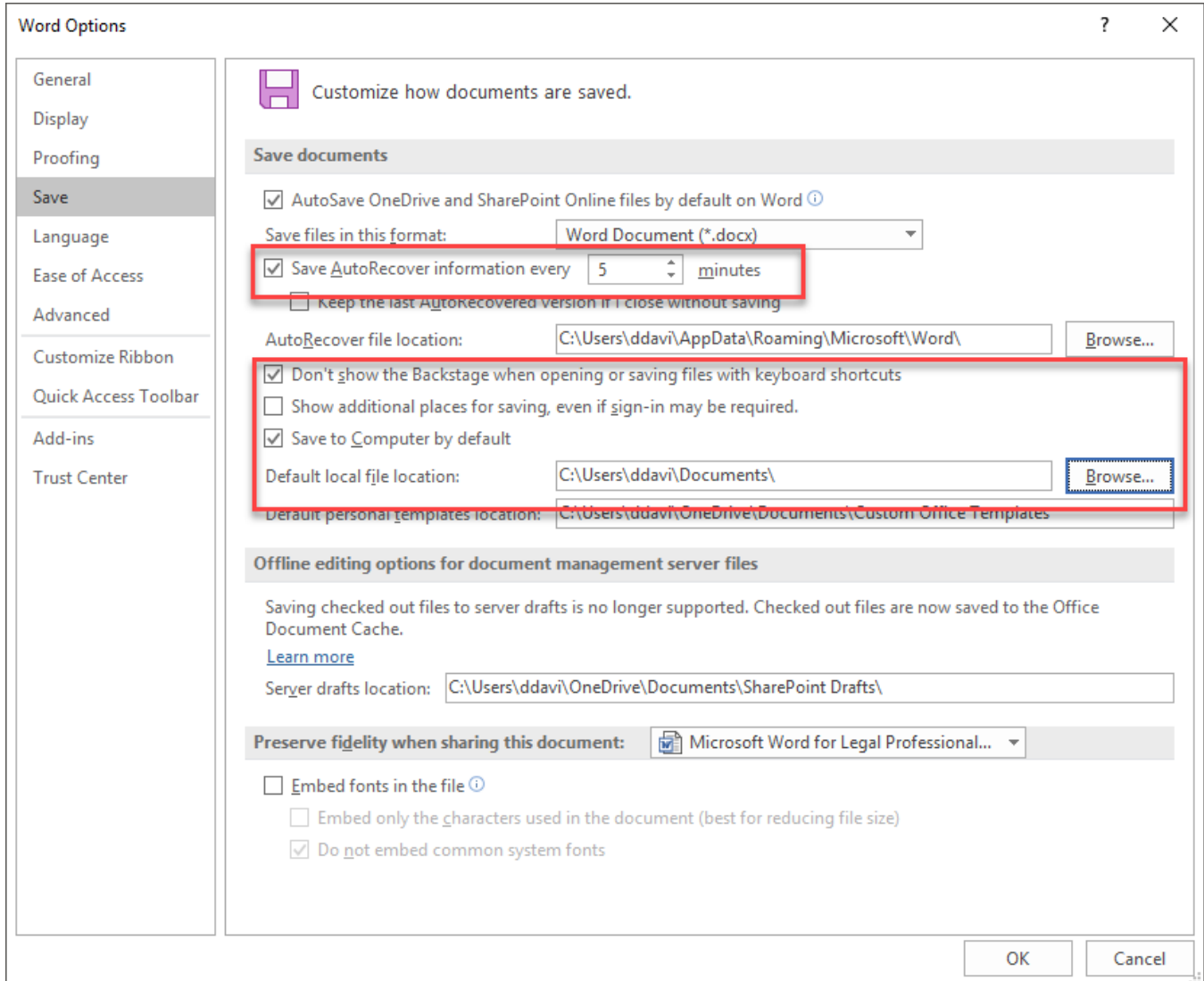
Options ➜ Save

FIGURE 2-11

- **Save AutoRecover information**: Reduce this to **5 minutes** rather than 10 minutes. More frequency is a good thing.

- **Don't show the Backstage when opening or saving files with keyboard shortcuts**: If you want Word to go directly to the open or save browse screens when you open or save a file using keyboard shortcuts (Ctrl + O and Ctrl + N), then check this box. There is no longer a setting to go directly to the open or save browse screens when clicking on the File menu.

- **Show additional places for saving, even if sign-in may be required**: This is just a waste of space on your save screen, so clear this box.

- **Save to Computer by default**: Microsoft really wants you to save everything to OneDrive and you probably don't want to. Therefore, check this box.

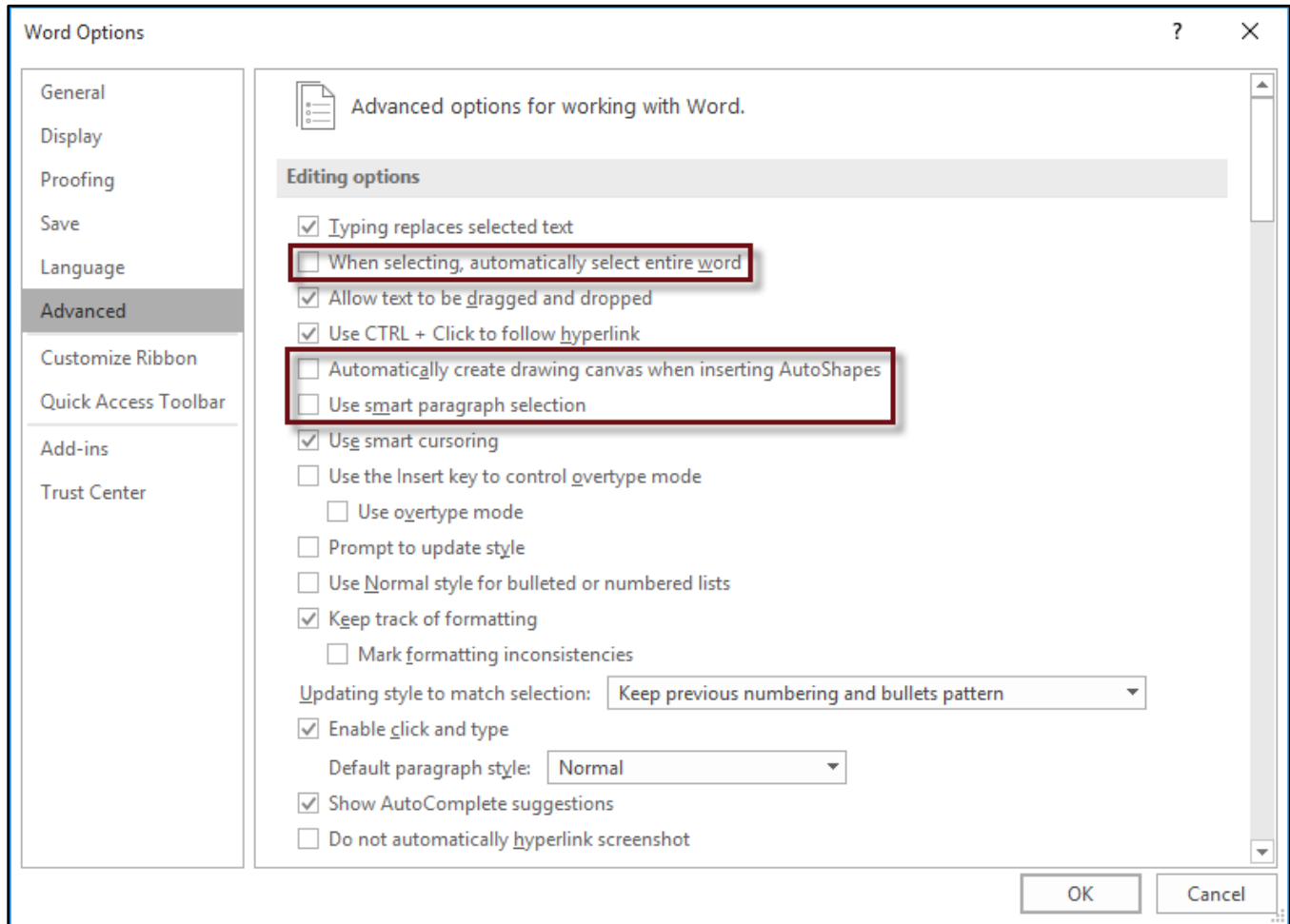# Options ➜ Advanced ➜ Editing Options

FIGURE 2-12

- Uncheck **When selecting, automatically select entire word.** Regain control over your mouse.

- Uncheck **Automatically create drawing canvas when inserting AutoShapes**.

- Uncheck **Use smart paragraph selection**. If checked, Word will automatically select the paragraph mark at the end of a paragraph you select and you may not always want to do that. If you don't select the paragraph mark and copy text, it will not bring the paragraph formatting with it when you paste.

Some other items to watch out for are:

- Make sure **Typing replaces selected text** is checked. If not, you will not be able to overtype on top of a selected word.

- **Use smart cursoring** moves the cursor when you scroll up or down through the document, this may or may not be what you want.

- **Enable click and type,** in print layout, this will move your cursor anywhere you double-click in an open area.

Options ➜ Advanced ➜ Cut, Copy and Paste

Note that in this area you can control the default paste action in a variety of circumstances. When copying from other programs (such as a browser), we recommend that you strip all formatting off of the source text. By changing the setting shown below, this will always be the case. You may want to change some of the other settings as well depending upon how you work.
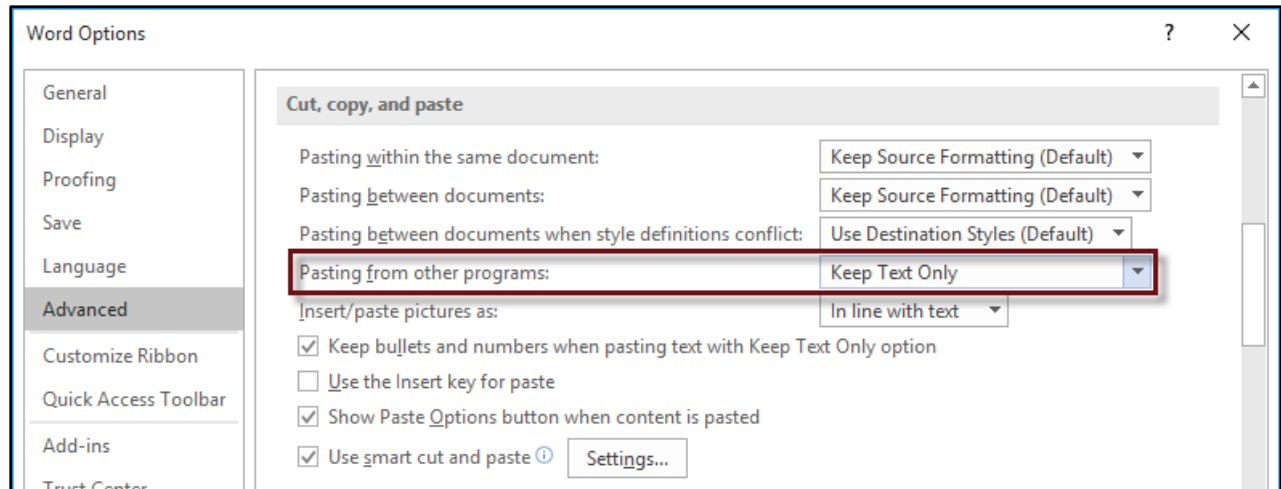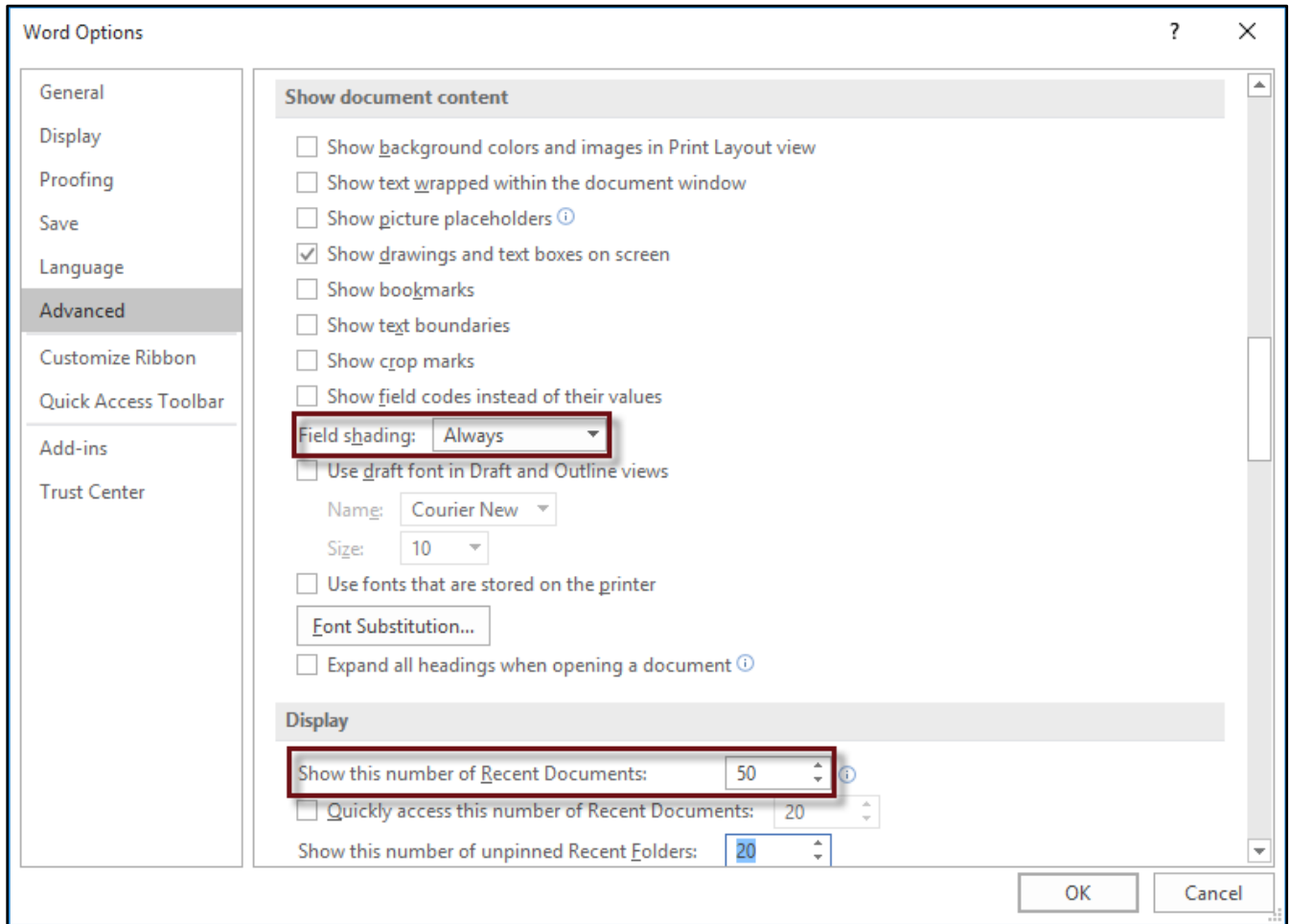

FIGURE 2-13

Options ➤ Advanced ➤ Show Document Content

FIGURE 2-14

- Change **Field shading** to **Always**.
- Change **Show this number of Recent Documents** to your preference.
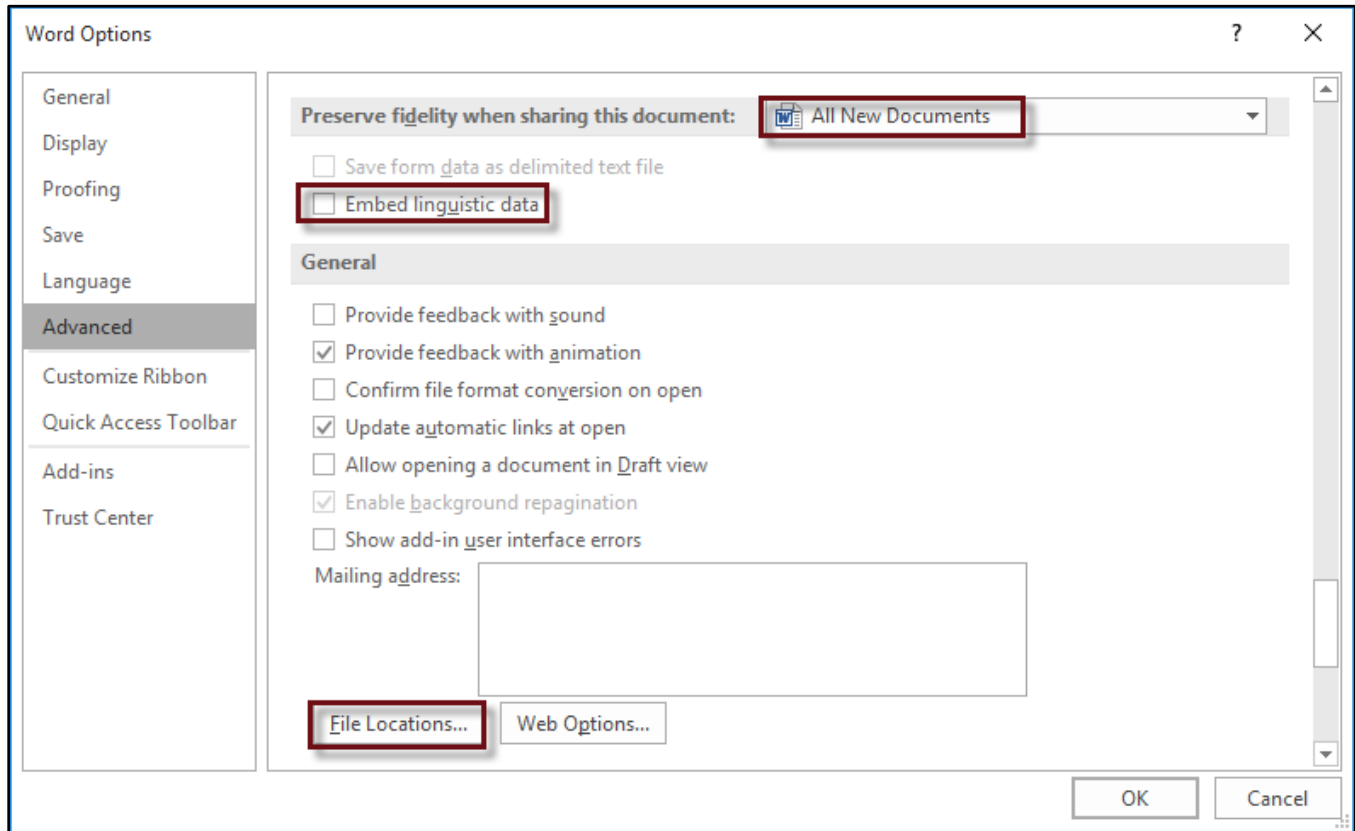
Options ➜ Advanced ➜ Fidelity & General

FIGURE 2-15

- Change the heading in **Preserve fidelity when sharing this document** to A**ll New Documents** (so the setting change applies to all future documents) and clear the **Embed linguistic data** box. "Linguistic data" refers to things like speech (from text-to-speech or speech-to-text applications or add-ins) and handwriting. You're probably not using either of those things so embedding them only makes the file-sizes bigger (unnecessarily).

- Click **File Locations** and make sure that Word is defaulted to look in whatever folder you keep your client documents. This saves you the annoyance of switching drives and folders every time you want to save something.
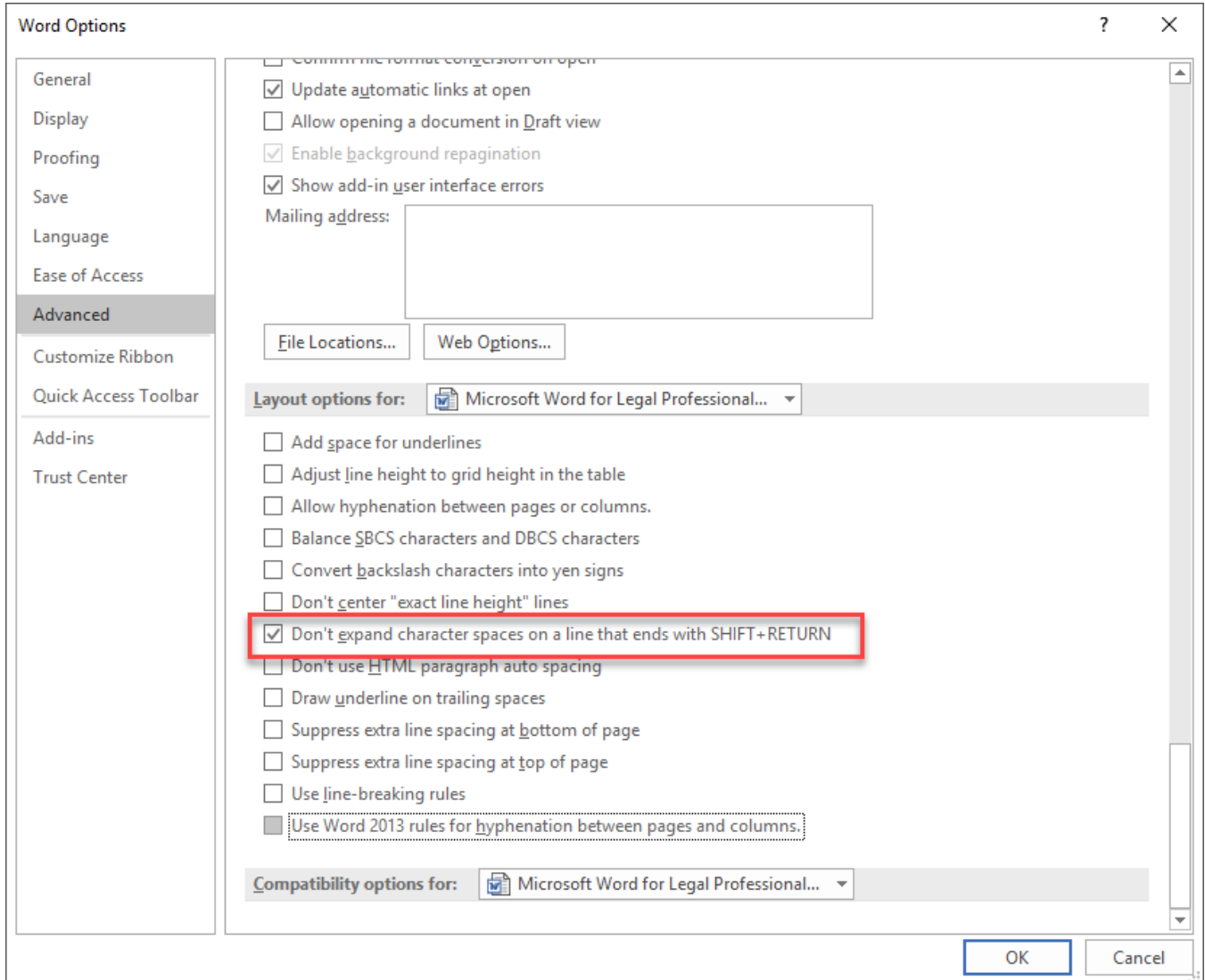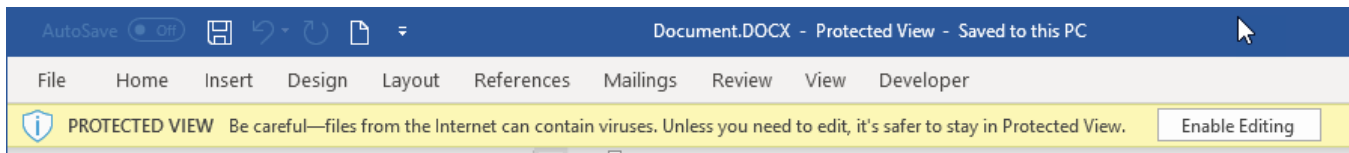
Options ➤ Advanced ➤ Layout Options

FIGURE 2-16

Check **Don't expand character spaces on a line that ends with SHIFT-RETURN** because this is the number one reason that a few words will be spread across the entire line with giant gaps between each word. For your information, Shift + Return = "soft return" which tricks Word into thinking that what appears to be two lines of text are actually one line of text.

Options ➤ Trust Center ➤ Trust Center Settings Button ➤ Protected View

By default Protected View is enabled. When enabled, Word displays a warning if the Word document was created on a different system. While the warning is displayed, the file may only be viewed, not edited. To edit the document, you must click the **Enable Editing button**.

Protected View disables all of the active content in the document and reduces the risk of infection from a worm, virus, or other malware that could be embedded in an unknown document.

If protected view bothers you, you may disable it. Yes, there is risk involved in disabling it. **You should check with your system administrator prior to unchecking these boxes**. To change these settings, go to **Protected View** and uncheck one or all of the boxes. See Figure 2-17.
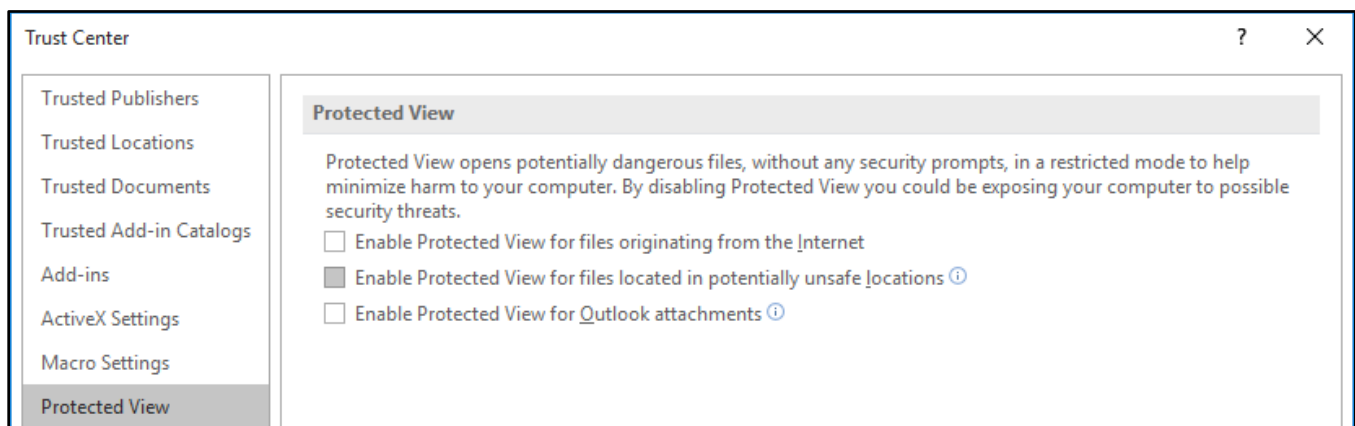

FIGURE 2-17

These boxes enable protected view, unchecking them disables the protection.

- **Enable Protected View for files originating from the Internet.** This should probably remain checked. If you download a Word document from a web page, or anywhere else from the internet, you will probably want the Protected View protection.

- **Enable Protected View for files located in potentially unsafe locations.** This is the main cause of triggering Protected View when opening a file from a network folder. You may disable this, but you may want to make your network server a "Trusted Location" instead. (See Trusted Location, below.) Unchecking this box also disables Protected View from other locations, such as USB thumb drives.

- **Enable Protected View for Outlook attachments.** With this checked, you will receive a protected view warning for every Word document that you open as an attachment from Outlook. Unchecking this box turns off the protection.

NOTE: In addition to these settings, Windows may "block" Outlook attachments that you save to your file system. To unblock them, you must right-click the file, select **Properties**, check the **Unblock box** (on some systems this appears as a button instead of a checkbox), and click **OK**:
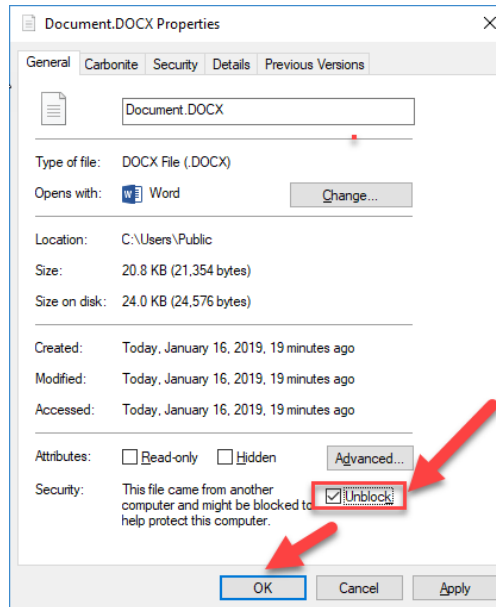
FIGURE 2-18

Options ➜ Trust Center ➜ Trust Center Settings Button ➜ Trusted Locations

Trusted Locations are for folders on your system or on your network that you trust. Adding a folder or network share as a Trusted Location completely disables all of the Trust Center checks and protections for that location. To add a folder such as "N:\Client Files" as Trusted Location:

1. Go to File ➜ Options ➜ Trust Center ➜ Trust Center Settings ➜ Trusted Locations.

2. Check the **Allow Trusted Locations on my network**. You will not be able to enter a network location without checking this box.

3. Click **Add new location**, enter the path of the folder and check **Subfolders of this location are also trusted**. Then click **OK** and **OK**. All documents in that folder will now be trusted, and the Trust Center will no longer check them.
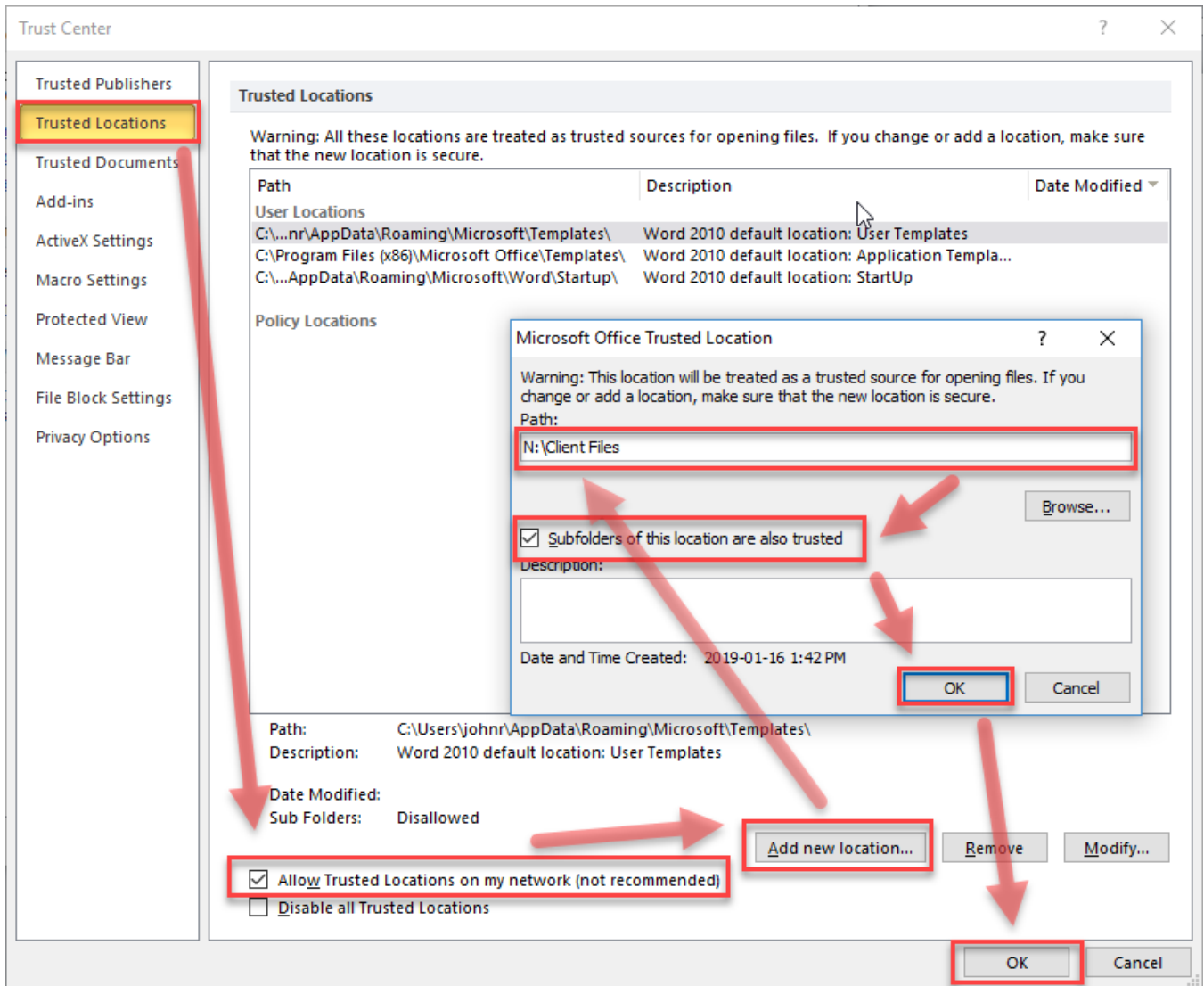
FIGURE 2-19

Options ➜ Trust Center ➜ Trust Center Settings Button ➜ File Block Settings

File Block Settings will trigger Protected View for all files of a particular type regardless of where they are located. Again, there is risk involved in disabling this feature. **Check with your system administrator before unchecking these boxes**. In particular, there have been prior issues with RTF files.

To have all file types open and allow editing without a prompt, under the **File Block Settings**, uncheck all of the check boxes and under **Open behavior for selected filed types**, select **Open selected file types in Protected View and allow editing**. See Figure 2-20.
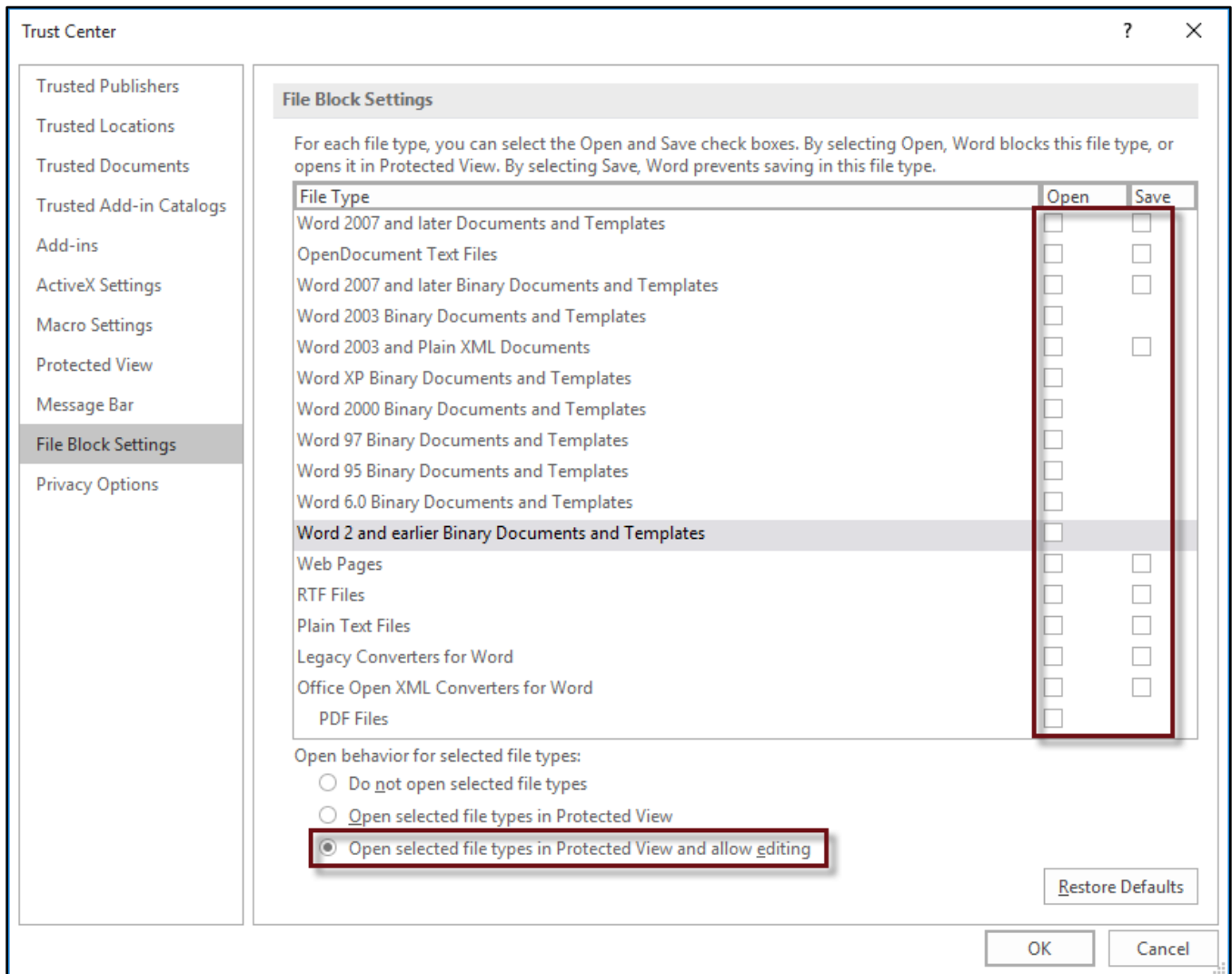

FIGURE 2-20

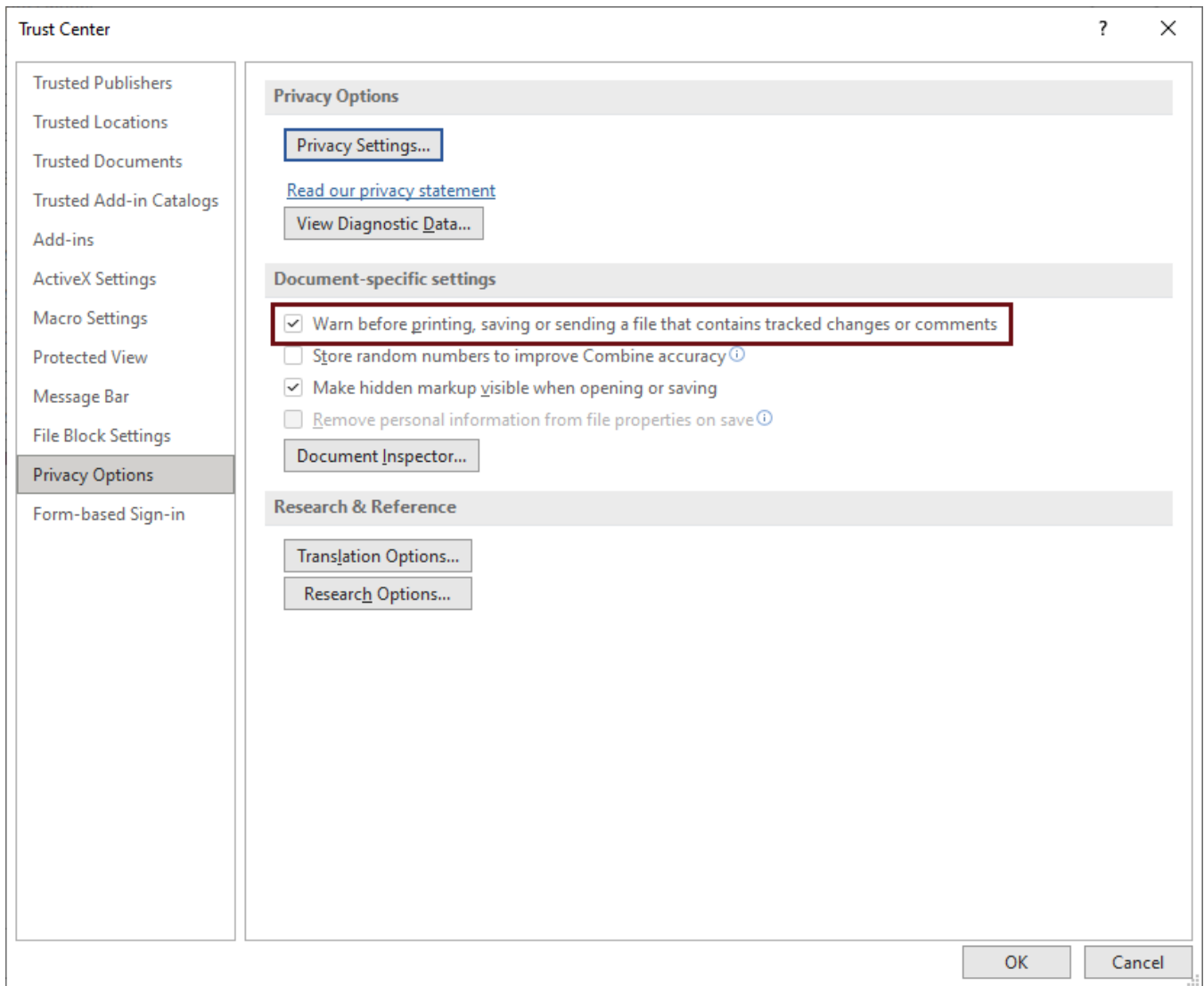# Options ➜ Trust Center ➜ Trust Center Settings Button ➜ Privacy Options

FIGURE 2-21

Go to the **Trust Center** and click the **Trust Center Settings button**. A new dialog will open. Click on **Privacy Options** and check **Warn before printing, saving or sending a file that contains tracked changes or comments**. Also clear the **Send personal information to Microsoft to make improvements to Office**.

Lock In Your Setting Changes

Make sure that after you're doing with all of the foregoing changes that you click the **OK** button, **NOT Cancel** and **NOT** the **X button** in the top, right-hand corner of the dialog. That makes the changes stick. It's a good idea after you do this to exit Word, re-launch Word and spot check a couple of the settings to ensure that they're still modified. If the changes don't stick, there are a couple of reasons that could happen and I can help you figure out why. Just send me an email - info@affinityconsulting.com.

Fix Track Changes Settings

There are a few changes you'll want to make to the Track Changes defaults. All of these changes begin on the **Review ribbon** in Word 2016.

Change the Markup

By default, Word shows you **Simple Markup** which means that if you delete text, it literally disappears and a little red, vertical line appears in the left margin adjacent to the line where something was deleted. Of course, I not only want to know that something was deleted, but *what* was deleted. Therefore, switch from **Simple Markup** to **All Markup** (see below).
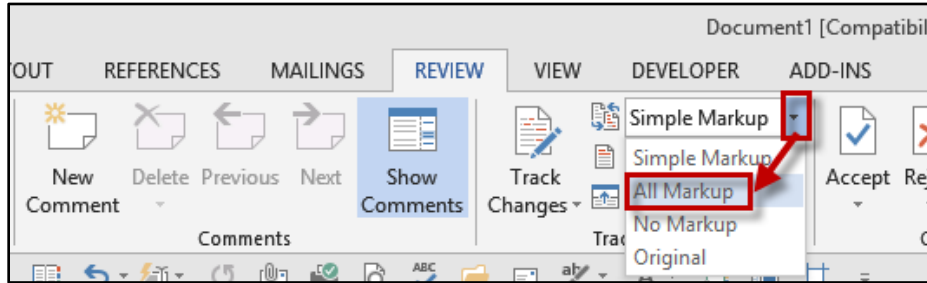

FIGURE 2-22

Track Changes Options

In order to get to this dialog, click **Review ribbon │Tracking launcher**.
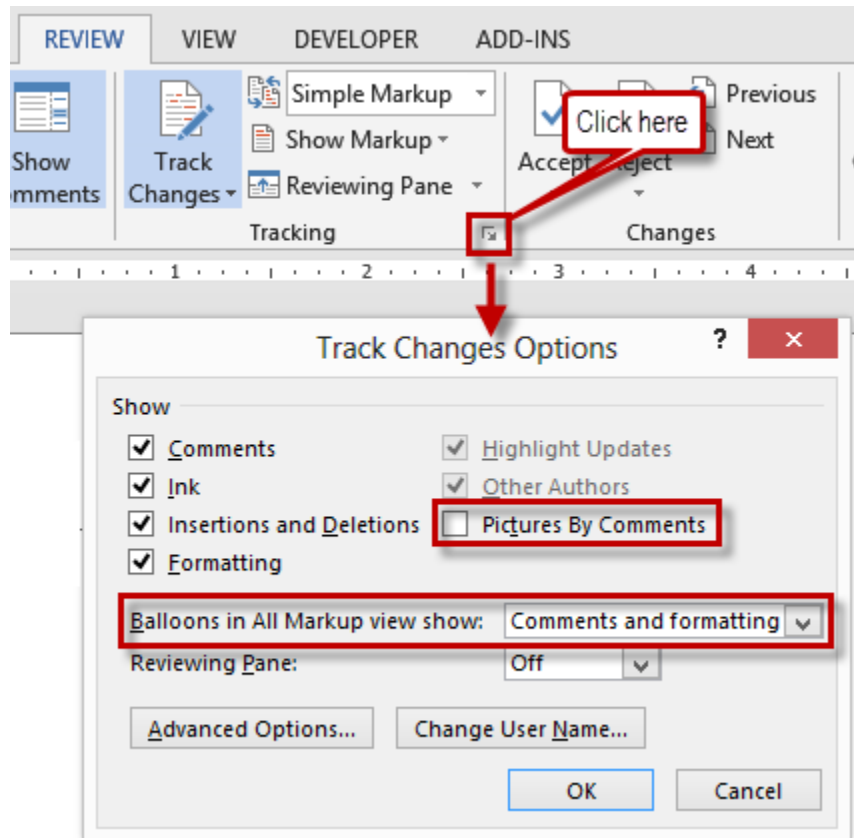

FIGURE 2-23

- Clear **Pictures By Comments** (unnecessary and clutters up the comment screen).
- **Balloons are best used for Comments and Formatting only**: not Revisions which is the default setting.