

# A Surprisingly Gratifying Guide to Expert Witness Report Formatting with Microsoft Word on a Microsoft Windows Computer


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## 1. Introduction

I first began learning laptop computer keystrokes when I purchased my first laptop computer, used from a friend in 1995. The mousepad was broken, so I had no way of pointing and clicking on the various menu items within Word or any other apps for that matter. Window management was also an issue, so I was forced to learn some of the subtler keystroke combinations that would give me access to the various applications on my laptop.

Looking forward to what might be next with report formatting, it could be that there are some killer AI apps on the near horizon that will obviate this mini-course in formatting. For now though, if you're like me and still use your fingers for typing and your brain for thinking, I hope you find this guide to be useful. Much of the content I picked up along the way as a graduate student and post-doctoral fellow at the University of Michigan and while on the engineering faculty of Drexel University.

## 2. Nomenclature

As the primary intent of this document is to provide technical instruction, I include a nomenclature section here as a reference for the various symbols and fonts used throughout the book. The format of the font in this paragraph is "body." After finishing this mini-course you will be able to define and use your own styles. See the Styles: body, body\_no\_indent, figure, caption, quote, heading section in the Pro Formatting chapter.

In the [Heading](#) of this section, you can see that I've used a [blue Calibri Light](#) as my font, which happens to be the default for MS Word. I have also enumerated the chapter headings for easier referencing.

There are two typical means formatting and cursor management: one way is to navigate a set of menus that otherwise would be navigated by mouse. As a simple example if we wanted to insert a picture into this document, we could use the mouse to navigate the menus. As an alternative, we could strike the key sequence `ALT→N→P→D`. Note that I've used the → symbol to denote a strike and release, such that only one key is depressed at a time, namely the four keys, `ALT`, `N`, `P`, and `D`.

There are other keystrokes, such as that for superscripting where three keys must be all depressed, for such sequences, I will use `CTRL SHIFT +`, where there is simply a space in between the key symbols.

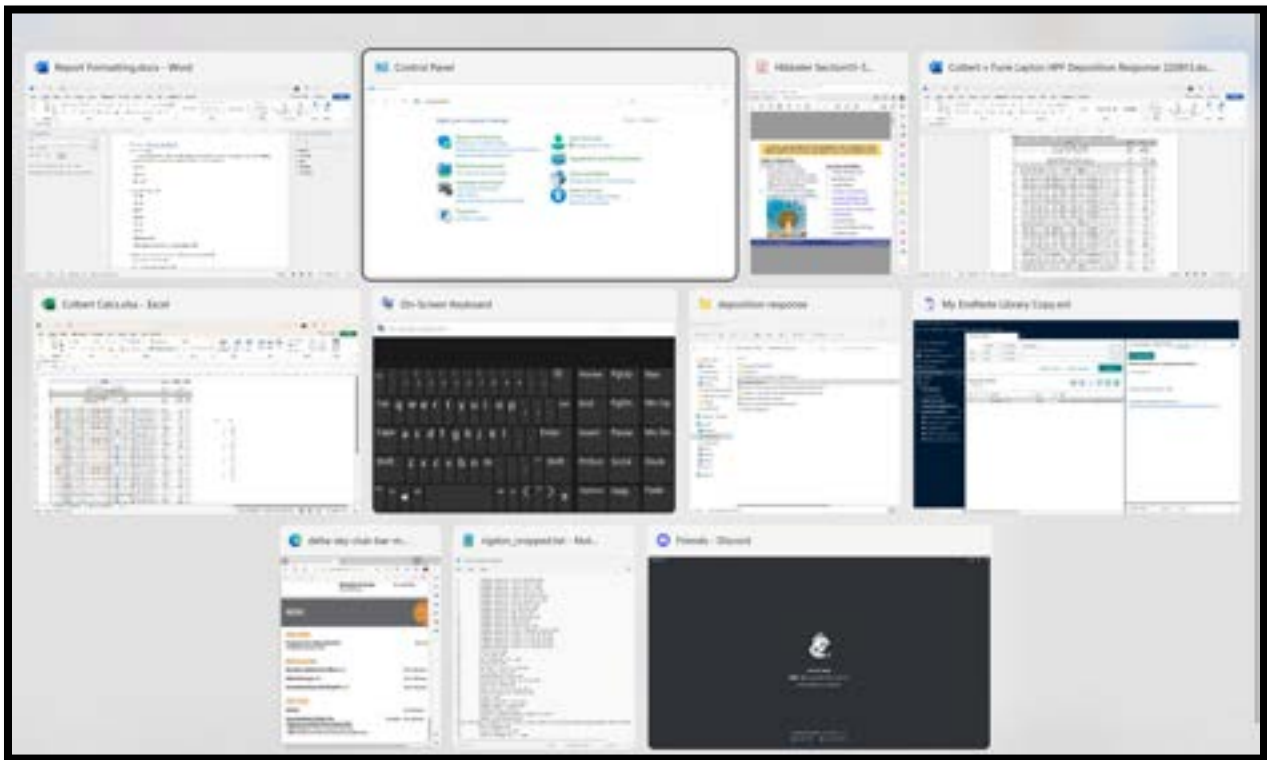
Note that I also use a combination of `gray highlighting` and `Courier New font` to distinguish keystrokes from the rest of the prose in this book.

### 3. Essential Key Strokes<sup>1</sup>

This chapter introduces the reader to several keystrokes that eliminate or greatly reduce the need to use your computer's mouse or mousepad. For report authors who manage several apps, I also include a brief windows management chapter: Chapter 9 Windows Management, page 20.

#### ALT - TAB to toggle among running applications

Note that with **ALT TAB**, you first depress the **ALT** key with your left thumb, then while holding down the **ALT** key, you hit the **TAB** key with your favorite left finger **Figure 1**.



**Figure 1.** As you hit the **TAB** key, running windows become highlighted. Release the **ALT** key when the window you desire is highlighted.

So, for example, to get to the fifth window in the sequence you would hit **ALT** → **TAB** **TAB** **TAB** **TAB** **TAB**

Everyday Essentials: **CTRL** **I**, **CTRL** **U**, **CTRL** **B**

If you've ever explored the control key before, you are likely familiar with these three keystrokes that create underlined **CTRL** **U**, **bold**, **CTRL** **B**, or *italics*, **CTRL** **I**.

---

<sup>1</sup> <https://youtu.be/69fPof-ZTnU>

## 4. Good Habits

Save your document with **CTRL S**

While sitting at my UNIX cluster and hopping back and forth to Macintosh computers for word processing in the early 2000's, my lab partners and I would get way into pumping out technical prose for publication in peer-reviewed scientific journals. In fact, we would get so deeply into our writing, and fill those machines up with some much dense complex content, that we would overwhelm their RAM and completely forget to save our precious precious work. After screaming out loud to each other in despair enough times, we eventually learned the secret: develop a nervous twitch of hitting every time we even glanced away from the screen, or even every time after hitting the **.** key. This nervous twitch was to hit **CTRL S**. It's a pretty simple keystroke, in fact one of the most ergonomically favorable, so do it a few times now with your left pinky and left index finger.

Select all of the text in your document with **CTRL A**

Let's say you have a document and the whole thing is in ten-point font, and you want to print a copy for a friend who prefers to read documents in fourteen-point font. Rather than trying to scroll through the entire document, or edit the document paragraph-by-paragraph, instead, hit **CTRL A** and select all of the font, then apply whatever formatting change you wanted to the entire document. You will also find **CTRL A** handy when updating your cross references and table of contents with a single click of the mouse as we will see in Chapter 9 Cleaning It UP, page 17.

Electronic Cut and paste with **CTRL X** and **CTRL V**

You've crafted a perfect paragraph in your expert witness report, but then realize that perhaps it's too technical for the main body of the report. You decide to create an appendix for this well-crafted but highly technical creation. First select the text with the skills learned from Chapter 5: Built for Speed – Quit Mousing Around!, page 5. Once the appropriate text is selected, hit **CTRL X**. Next place your cursor where you want the cut text to appear and hit **CTRL V**. This combination of keystrokes is also particularly handy when hopping around among different document types, and for copying an pasting difficult-to-remember passwords.

Oops I Did it Again! Instantly fix mistakes with **CTRL Z** (Undo)

You're typing merrily along when your finger slips and deletes an entire paragraph or some other weird, unexpected and annoying thing happens to your report. Do not fret. Do not panic. Do not start hitting random keys. Focus. Focus your attention on hitting the **CTRL Z** key combination. Your accidentally deleted paragraphs reappears just as it was. Now hit **CTRL S**, take a deep breath, a sip of coffee, and get back to work.

Don't be a Computer, Use Your Computer. Redo Repetitive tasks with **CTRL Y**

Let's say you have just applied a fancy style to some font in one of your paragraphs and you realize that you're going need to do this again throughout your document. Rather than finding the same key again, in this case, the border style that I've used throughout this document, highlight the font you want and hit **CTRL Y**.

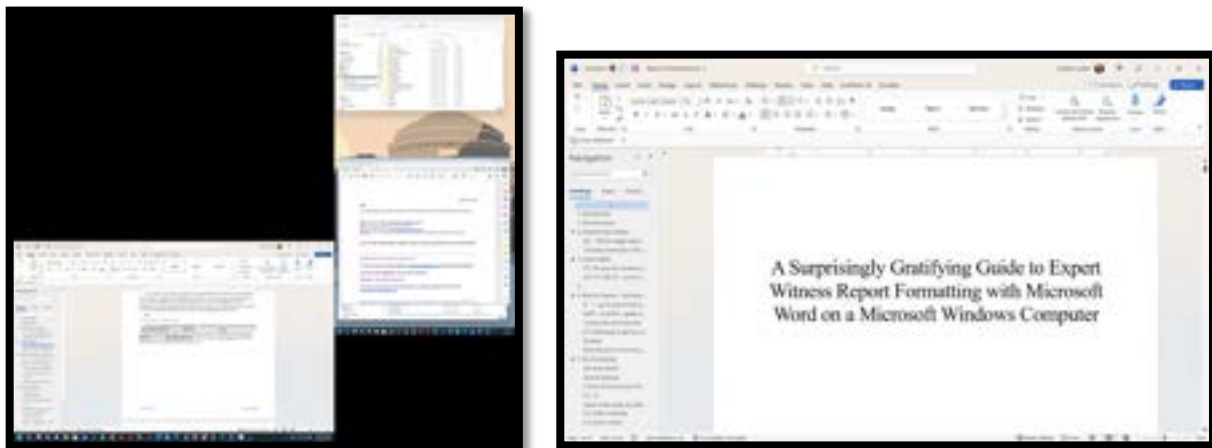
CTL-W close file (works for Chrome tabs too)

If you prepare reports like I do, after you've been working for a long time, you'll probably have a dozen or so files open and likely lots of tabs too. If your computer is slowing down, or you're reaching a deadline, now would be a good time to **ALT TAB** through the various applications you have running and start closing a few windows. This will enable your computer to run more efficiently and allow you to focus on wordsmithing your document.

After

ALT-CTL-PRT SC – print screen

One of the handiest keystroke combinations I learned just prior to authoring this document is **ALT CTRL PRT SC**. Typically **PRT SC** can be found on the **F10** key, or thereabouts, and is used to capture a static image of what you're presently seeing on your computer screen(s). The problem with simply using **PRT SC** rather than **ALT CTL PRT SC** is that if you have multiple screens you will likely end up with unwanted data that you have to crop (**Figure 2**).



**Figure 2.** Left window is the result of **PRT SC**. Right window is the result of **CTRL ALT PRT SC**.



## 5. Built for Speed – Quit Mousing Around!

This chapter's purpose is to help you end your mouse addiction. When I purchased my first laptop from a friend in 1996, the laptop's mousepad was broken. To do anything on this 486 machine, I was forced to use the keypad for everything. Fortunately, the Windows operating system was designed to allow users to do just about anything and everything with the right combination(s) of keystrokes on the keypad. Here are a few that I use regularly and indeed as second nature to keep me from caving into the temptation of going for that mouse or mousepad every time I want to move the cursor, select text, or perform another routine command.

`fn` `>` go to end of line (function rightarrow)

You're typing along and you see some text at the end of your paragraph or line that you need to get rid of, or you have a set of characters in your clipboard memory that you need to paste at the end of a line. Don't fumble for the mouse or carefully try to position your cursor at the exact end of your line or paragraph, risking a click in the wrong place. Instead, depress the `fn` key with your left ring finger and the `>` key with your right ring finger. Bam! The cursor is exactly where you wanted it. Please note that I am distinguishing between the `>` (greater than sign) on the `.` (period) key and the `>` (rightarrow) key, which is typically found in the bottom right corner of your keypad.

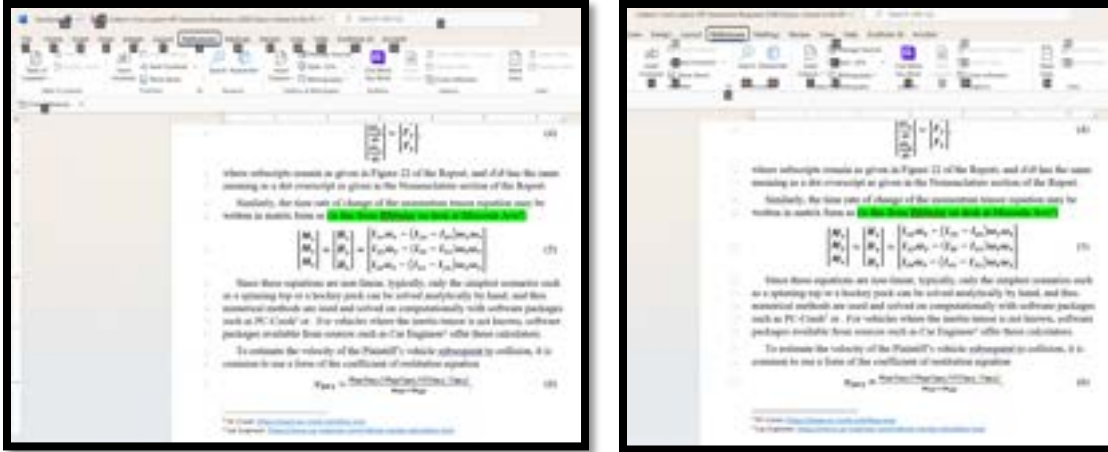
`fn` `<` go to beginning of line (function leftarrow)

As you might have guessed, the same trick we just learned above, works in reverse. Hit `fn` `<` to instantly position your cursor at the beginning of a line. Once your cursor has arrived precisely at its intended destination, you are ready to continue navigating precisely through your document.

`SHIFT` `>` or `SHIFT` `<` grabs single characters one at a time

Just as we learned with `fn` `>`, using the SHIFT key(s) with the left and right arrows allows you to highlight and manipulate format, etc., single characters. This set of keystrokes is SHIFT - ↓ or SHIFT - ↑ Grab multiple lines quickly. uparrow downarrow

ALT-S-F Insert Footnote



**Figure 3.** To insert a footnote, hit ALT, S, F in order.

ALT-S macro: format as symbol, e.g. W -> Ω, m -> μ, etc.

Use **CTL C** followed by **CTL V** on a figure caption to quickly embed the autonumbering feature of figure captions and table captions in new figures and tables.

### Superscript and Subscript

To turn a character into a superscript, such as with  $x^2$ , first highlight it with **SHIFT >** or **SHIFT <**, then

**CTL SHIFT +** to get a super<sup>script</sup>

**CTL SHIFT =** to get a sub<sub>script</sub>

CTL-leftmouse to get to a location in document followed by alt-leftarrow to get back

Let's say you are looking for a particular spot in your document. You go the Table of Contents and find the topic you want. Rather than left-clicking, use CTRL leftmouse to get where you want. Once you're done, you can use **ALT <**.

Clickbait – Double-Click and Triple-Click to Precisely control text selection.

Double click a word to highlight the entire word.

Triple click within a paragraph to highlight the entire paragraph.

Add macros to limit mouse time

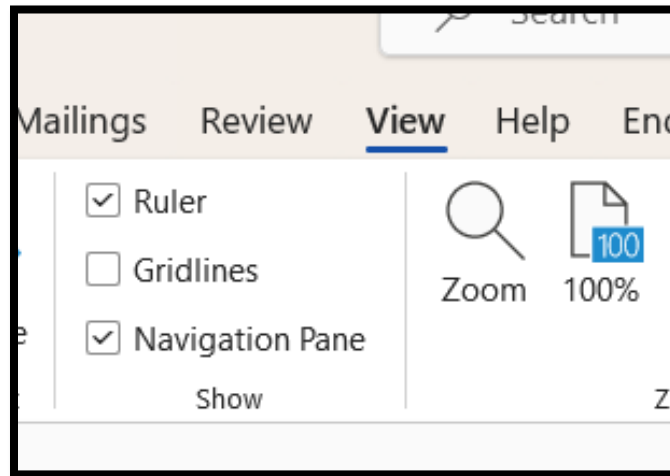
For example, I have defined **CTRL 6** for green, **ALT D** for degree, °, and **ALT S** for symbol. Symbol, by the way, is super-handy for adding Greek letters.

1        6. Pro Formatting

2        The Ruler Rules!

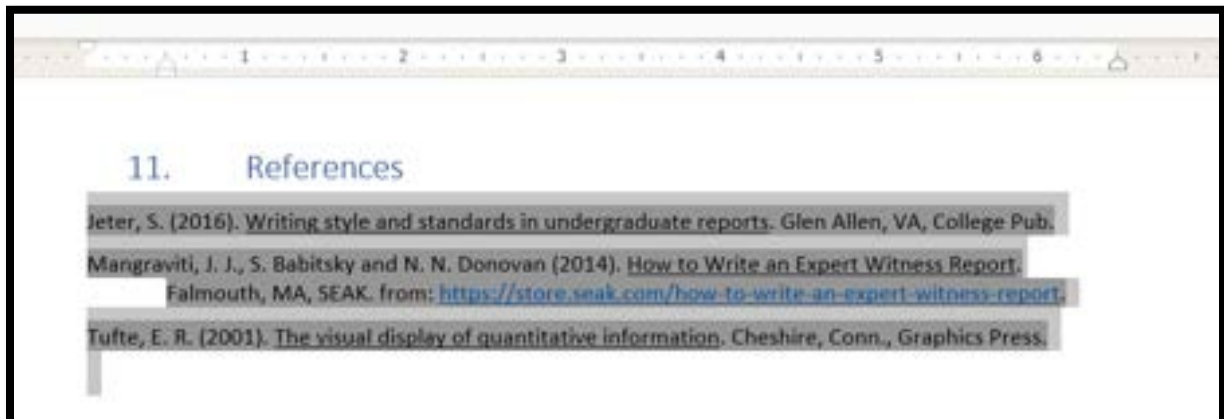
3            Use the ruler to define your styles as you begin laying out your document, and to clean it up  
4        at the end.

5            If you're in Microsoft Word and you don't see the ruler, go to **View → Show** and check **Ruler**  
6        (**Figure 4**).



7  
8        **Figure 4.** Be sure to turn on the Ruler whenever you are verifying indents and verifying, inserting or  
9        adjusting tabs.

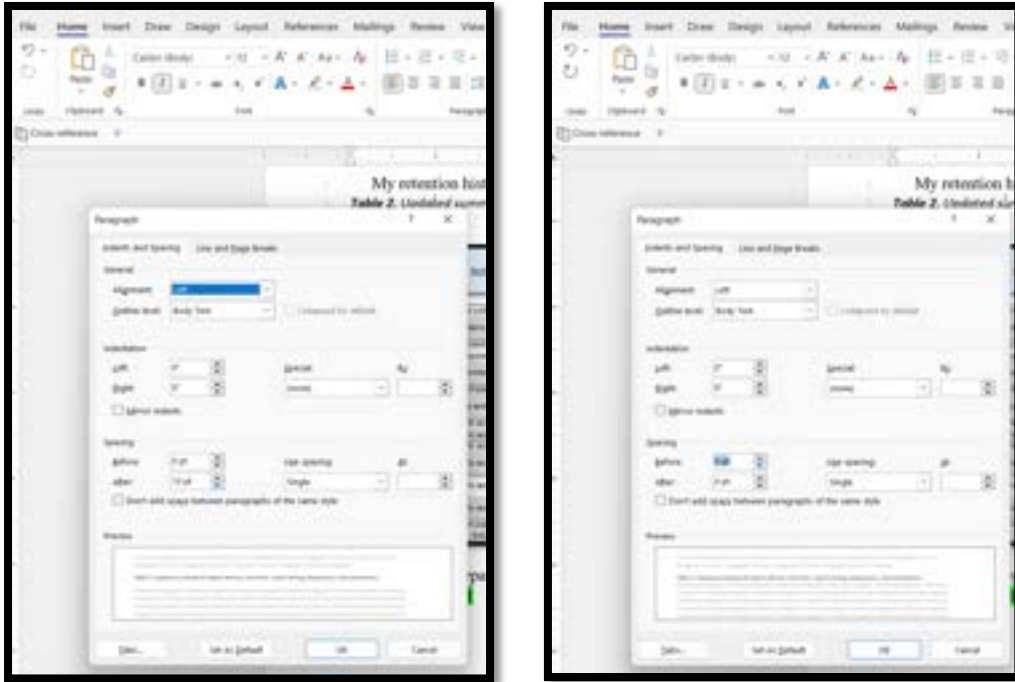
10        Take advantage of the hanging indent for references.



11  
12        **Figure 5.** Notice how I use a 0.5" hanging indent to format the refences as is standard for most reference  
13        styles. Note also how EndNote™ takes care of alphabetization for me.

## 1 Vertical Spacing

2 When formatting your styles, it is typically bad practice to add space below lines. Instead  
3 add space above lines.



4  
5 **Figure 6.** In the image on the left, Spacing is set to 0 pt before and 10 pt After. Instead, change this  
6 to 0 pt After and an appropriate value for Before as seen in the image on the right.

## 7 A Font of Fonts at your Fingertips

8 Lately I've been using Courier New for my expert witness reports, as this is the font I  
9 frequently see in other legal documents. Courier New maintains the same number of pixels  
10 per character, so a period and a W occupy the same space horizontally along the page. Another  
11 rule of thumb for fonts is to use a serifed font such as Times New Roman for documents that  
12 are going to be physically printed, and a sans serif font such as Calibri for documents that are to  
13 be viewed on a computer screen.

### 14 **CTRL D** to bring up the Font Menu

15 To bring up the font menu, hit **CTRL D** and select your font of choice from the menu.  
16 Don't go overboard with this. Use a serifed font like Times New Roman for the body and a sans-  
17 serif such as Calibri for tables and figures. As I mention above, It is also common for legal  
18 documents to use Courier New.

### 19 Styles: body, body\_no\_indent, figure, caption, quote, heading

20 The styles listed in this section's title are used in this document. There really is no limit to  
21 the number of styles you can define. My advice here is to find a set of styles you like and stick  
22 with it, using a well-formatted report as a style template for future reports.

23 When transitioning from one style to the next, you'll note that this is typically done  
24 between ¶ symbols after using your **CTRL SHIFT 8** command you'll learn below. If you have  
25 a style you like and want a subsequent paragraph to inherit the same style, when hit return at  
26 the end of a paragraph, the new or existing subsequent paragraph inherits the style of the  
27 preceding paragraph.

### 28 **CTRL SHIFT HYPHEN** to keep a hyphenated word from breaking across lines

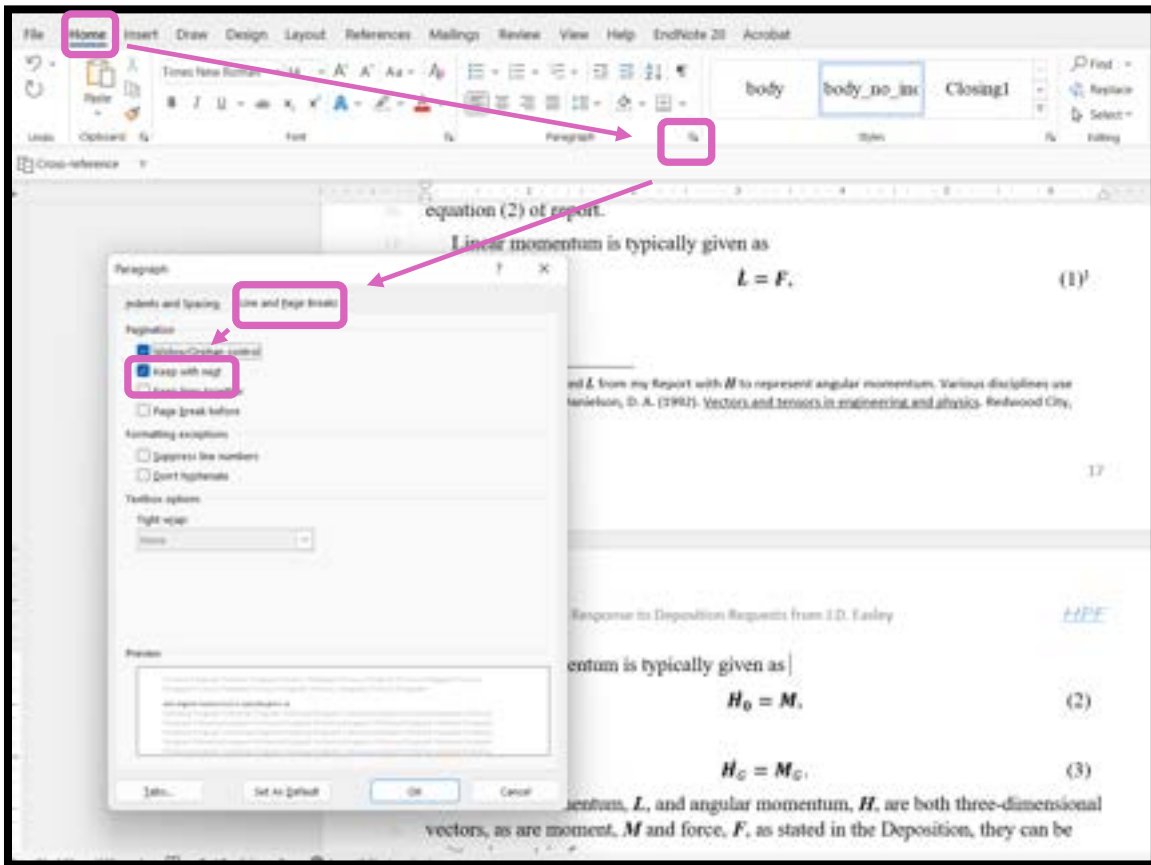
29 Ever have a compound adjective that you want to clearly display as a compound adjective?  
30 Rather than leaving a line break as ambiguous, keep the text preceding and following the  
31 hyphen together by using **CTRL SHIFT -**.

1 **CTRL** **SHIFT** **SPACE** to keep a phrase from breaking between lines

2 Ever have a phrase such as “55 mph” that looks better on a single line, but it breaks  
3 between lines? To keep the “55” with the “mph,” hit **CTRL** **SHIFT** **SPACEBAR** to keep  
4 55 mph as a single entity on the same line.

5 **Home** → **Paragraph** → **Keep with next** to keep lines together

6 This is one of my main go-tos in report formatting, especially when it comes to keeping a  
7 heading with the paragraph that follows it. To do so, follow the menus of **Figure 7** or use the  
8 keystroke sequence **alt** → **H** → **PG** → **P** → **tab** → **tab** → **spacebar** → **enter**.



9  
10 **Figure 7.** In this screenshot, we see the sequence of **Home** -> **Paragraph** -> **Line and Page Breaks** -> **Keep**  
11 **with Next**, which ensures that the text preceding equation (2) appears on the same page as equation (2).

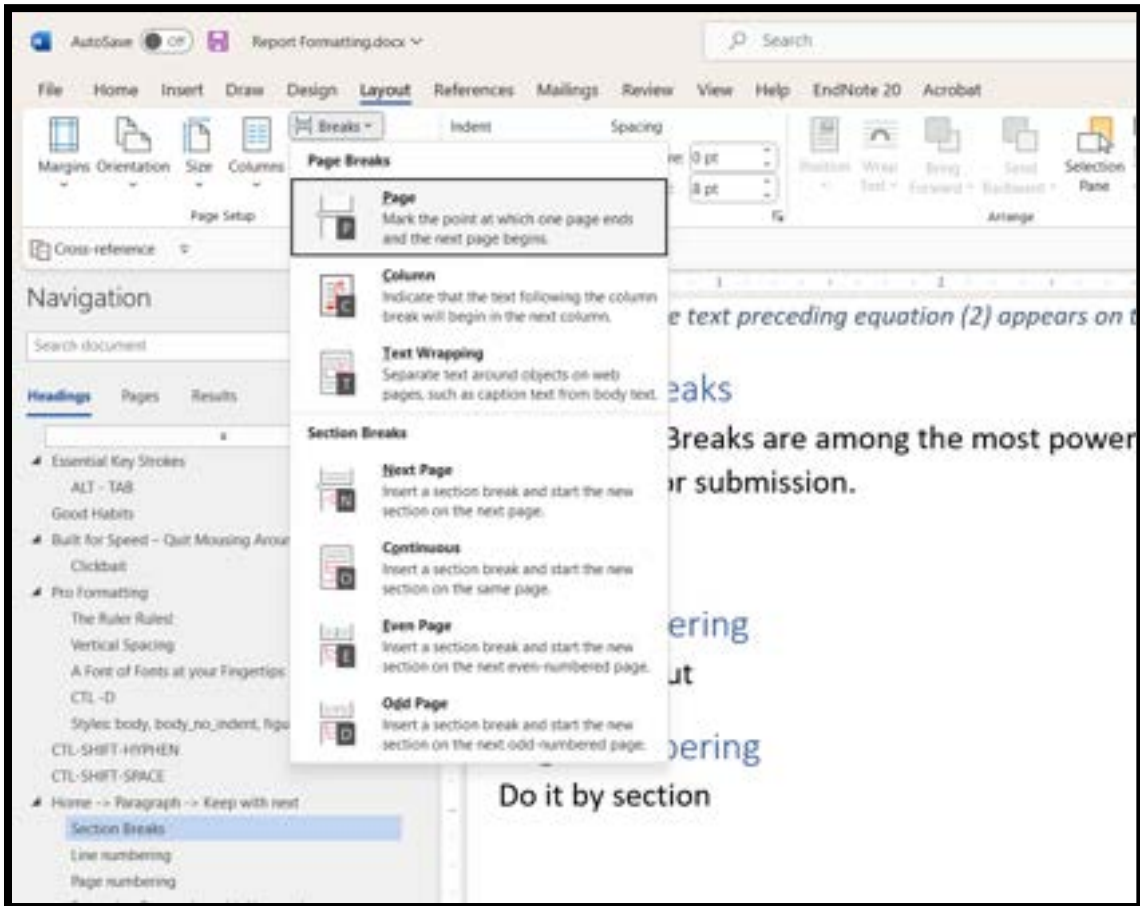
12 In fact, when preparing this very subsection, I used **Home** → **Paragraph** → **Keep with next** to  
13 keep the paragraph preceding **Figure 7** on the same page as **Figure 7**.

14 **Home** -> **Paragraph** -> **Indents and Spacing** → **Spacing** → **Before** to add consistent spacing  
15 before various Styles

16 This subtle, but critical pro formatting maneuver serves several purposes. First, it makes  
17 your report more readable by making the styles more predictable. Predictability facilitates  
18 visual searching by the attorney or paralegal who will be scanning your report for key  
19 information. By making this formatting change early in authoring your report, and then saving  
20 this to a Style, you won't have to worry about the formatting later as you're writing, leaving you  
21 to simply get your thoughts into your report. Also, once you've committed to a spacing for  
22 Styles like body, figure, Heading 1, Heading 2, caption, etc. and need to change something later,  
23 you can easily do this by changing it once in a particular instance of a given Style, then selecting  
24 the dropdown in the Styles menu, hovering over the appropriate Style, right clicking, and  
25 selecting **Update Style to Match Selection**.

1 Section Breaks – Layout → Breaks → Section Break → Next Page

2 Section Breaks are among the most powerful formatting tools at your disposal as you  
3 prepare your document for submission. To add a new section that begins on the next page,  
4 follow the instructions in **Figure 8**.



5  
6 **Figure 8.** To enter a section break that begins on the next page, go to **Layout → Breaks → Next**  
7 **Page**.

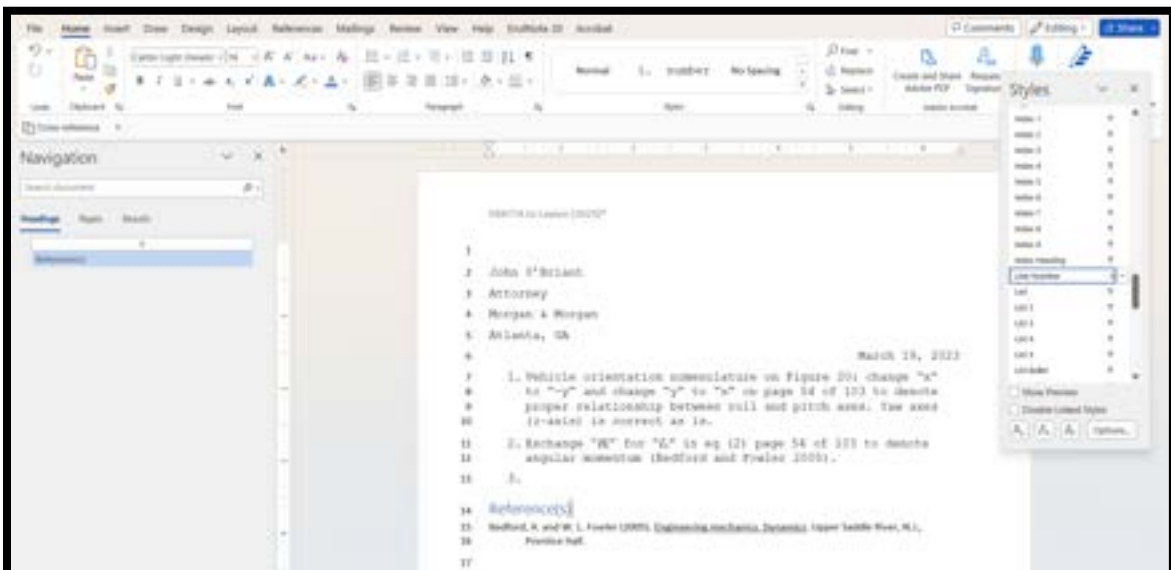
8 The ALT sequence for this is **ALT → P → B → N**.

9 Line numbering

10 In addition to page numbering, which all of your expert witness reports must have, it is also  
11 advisable to add line numbers to your report.

12 Be sure that when you are adding line numbers that you start each new page with new line  
13 numbers beginning with “1.”

14 To keep the line numbers from stealing the show, grey them out by going into the little  
15 right-diagonal down-arrow in the bottom right corner of the Home → Styles menu (**Figure 5**).



16



1 **Figure 9.** Find “Line Number” under the bottom-right down-right arrow at the bottom of the Home →  
2 Styles menu and select a gray font so that the line numbers do not overwhelm the body text..

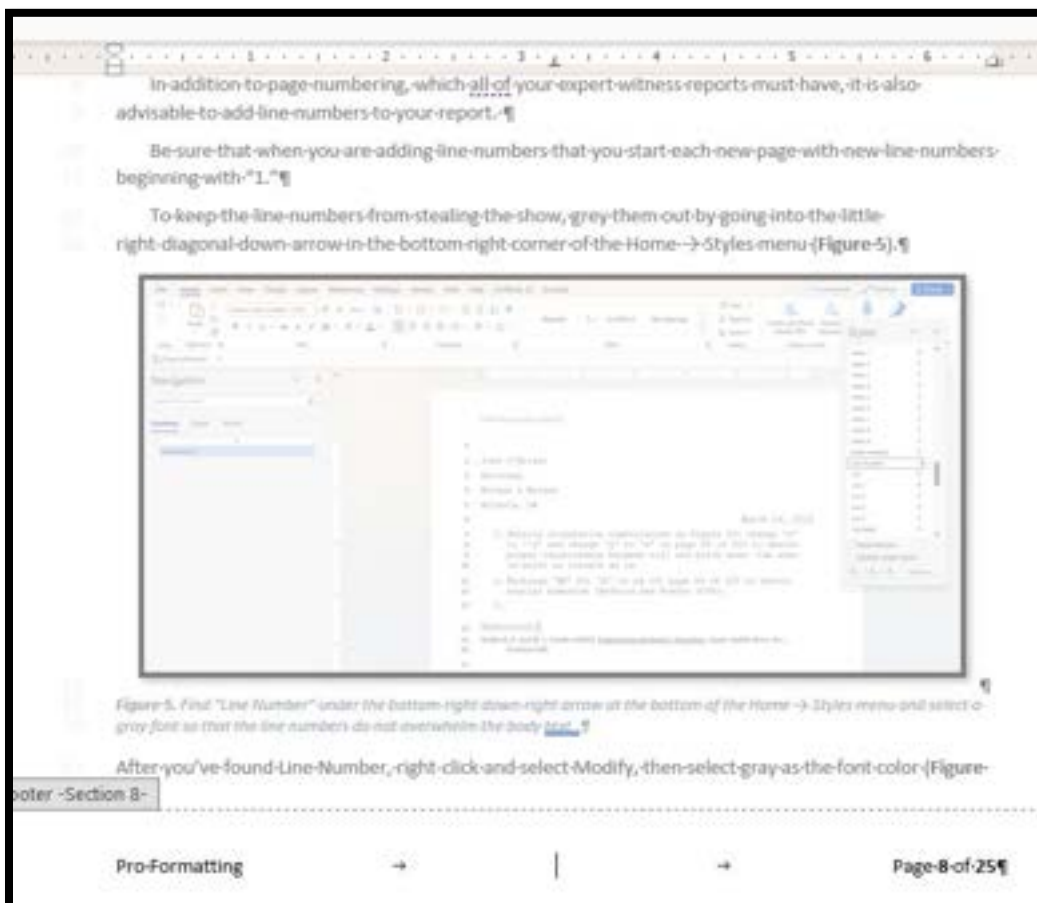
3 After you’ve found Line Number, right-click and select Modify, then select gray as the font color (**Figure**  
4 **6**).



5  
6 **Figure 10.** Once you’ve found the font menu under “Modify” after right-clicking on the Line Number  
7 style, you should have the option to change the Font color to gray.

## 8 Page numbering

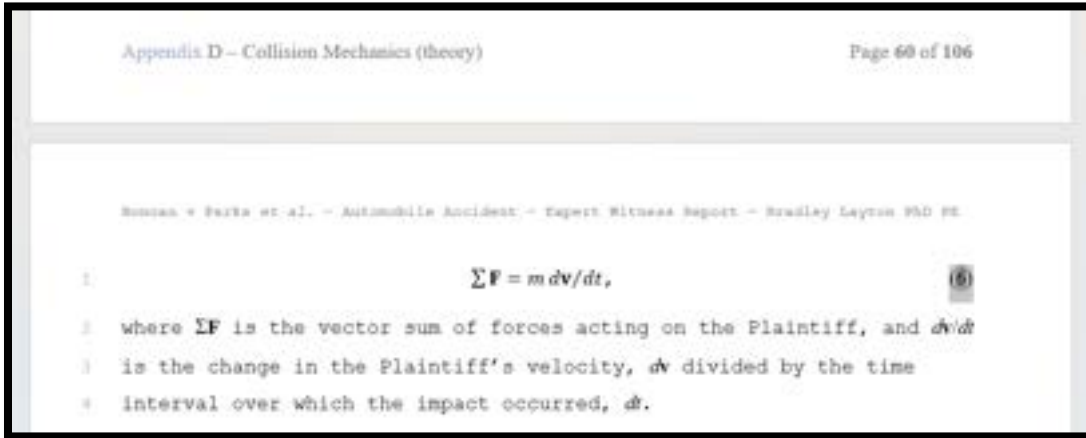
9 My preference in page numbering is to include page numbers in the format of “Page x of y”  
10 as I’ve done in this document. I typically right-justify the page numbers, which leaves the left  
11 side of the footer available for the section name.



12  
13 **Figure 11.** Note how there are two tabs between the section name and the page number in the footer.  
14 Note that there are two corresponding tabs: one center and one right in the ruler. The center tab may be  
15 superfluous, but the second tab ensures that the

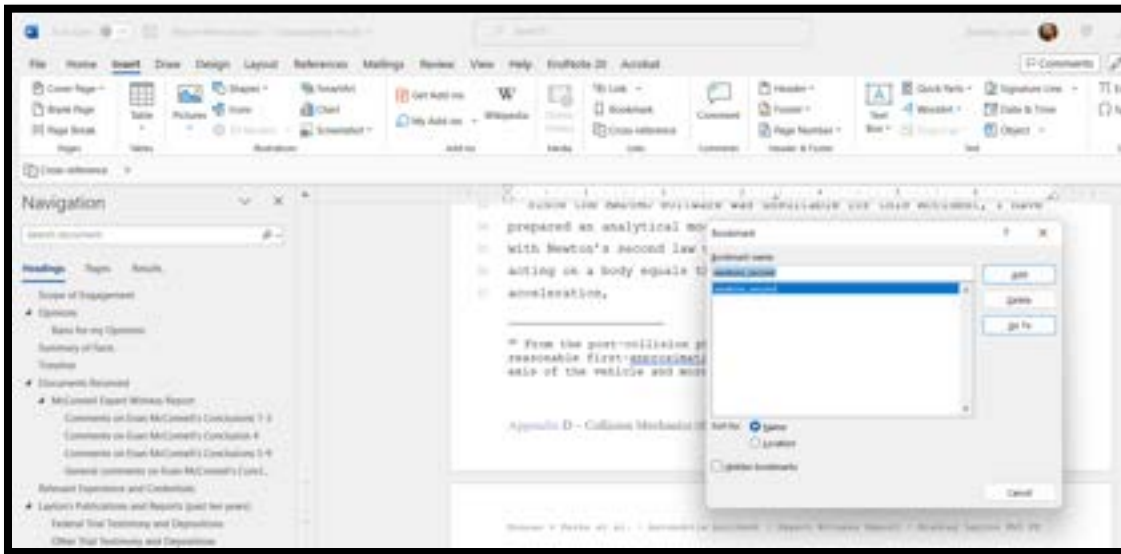
1 Inserting bookmarks

2 Bookmarks allow you to have control over the symbols you choose to represent a given  
3 portion of your report. For example, for a report that uses equations, you might wish to  
4 reference a given equation number. Rather than manually entering an equation number that is  
5 likely to change as you update your document, insert a bookmark. As the numerical value of the  
6 equation changes, the bookmark text will also be updated.

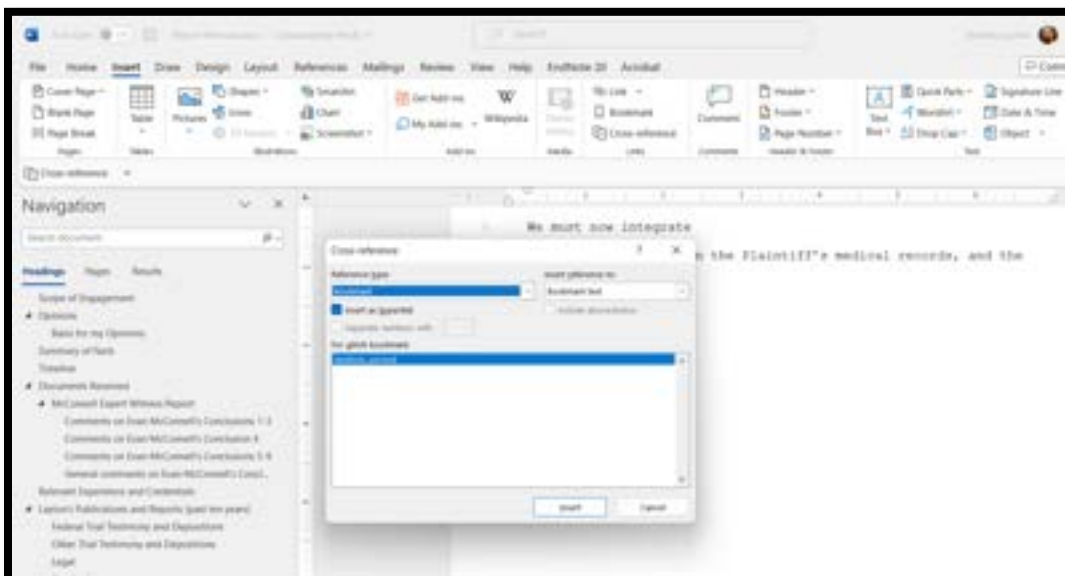


7  
8 **Figure 12.** First highlight the text that you want to appear when you cross-reference your bookmark.  
9 Here I have highlighted the number 6 and both parentheses on either side of it so that when I insert a  
10 cross-reference to this particular bookmark, all three characters “(6)” will appear.

11 After you have selected the text that you wish to be represented by your bookmark, name  
12 your bookmark .



13  
14 **Figure 13.** Name your bookmark. Note that bookmark names may not include spaces.

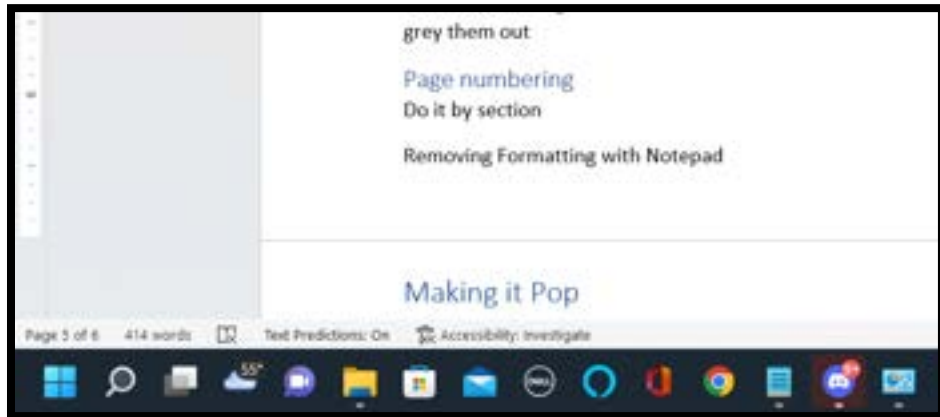


15  
16 **Figure 14.** Go to Insert → Cross-reference → Reference type → Bookmark, and select your bookmark.



- 1 The text associated with your bookmark will appear in the location you selected.
- 2 Later, if you add another equation, (6) will advance to (7) as will any cross references to this
- 3 equation.

#### 4 Removing Formatting with Notepad



5  
6 **Figure 15.** Copy and paste text into Notepad to remove unwanted formatting.

#### 7 A few built-in MS Word formatting features

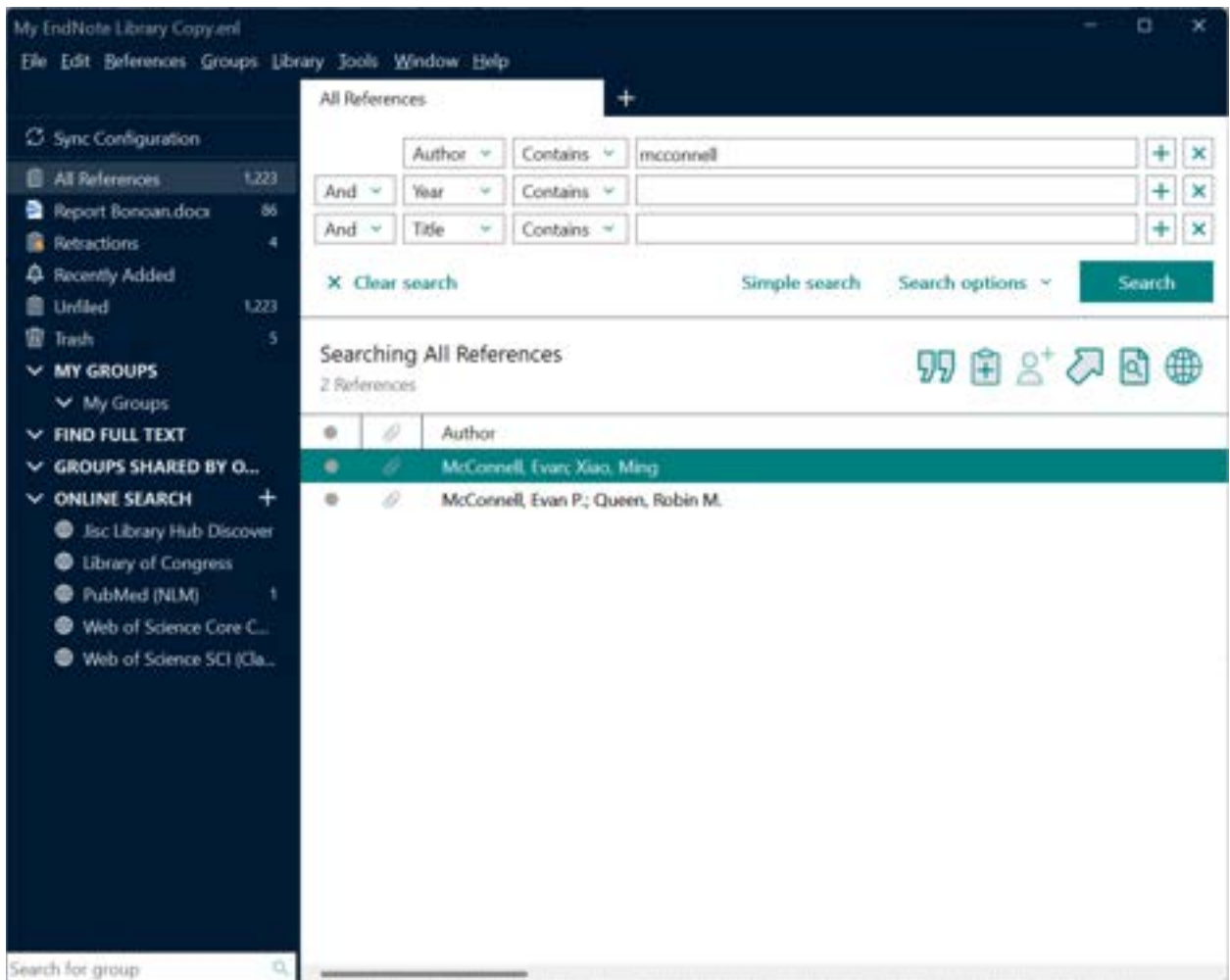
- 8 Copyright© and trademark™ are a couple of built-in formatting hacks built into MS Word.
- 9 To get these two superscripted symbols after a particular word, simply type a left paren before
- 10 and a right paren after, and the symbols appear.

## 7. EndNote

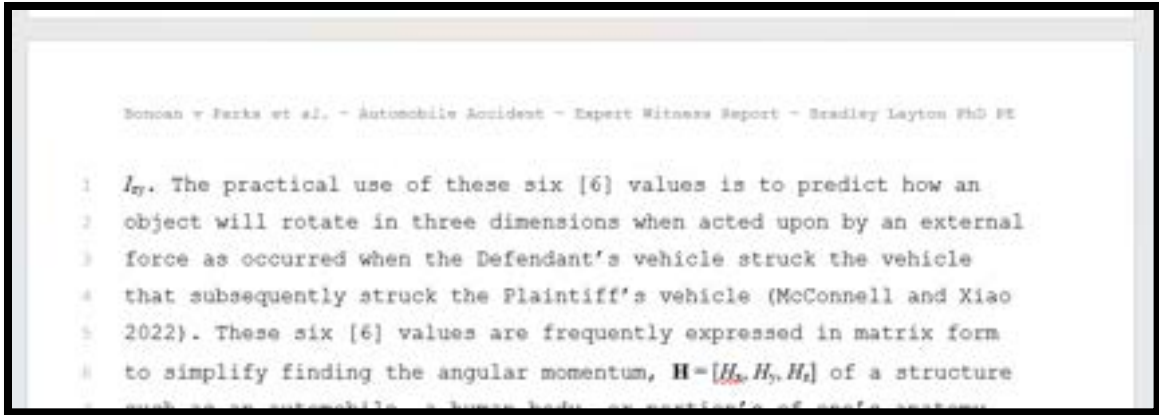
I discovered EndNote in graduate school. If you haven't tried it and are still using manual citation entries, and have more than ten [10] references in your report(s), it's time you loaded EndNote on your computer.

The handiest key for EndNote is `alt-2`. `alt-2` allows you to instantaneously add a fully formatted citation and its associated bibliography entry.

Watch this video on how quickly this works.

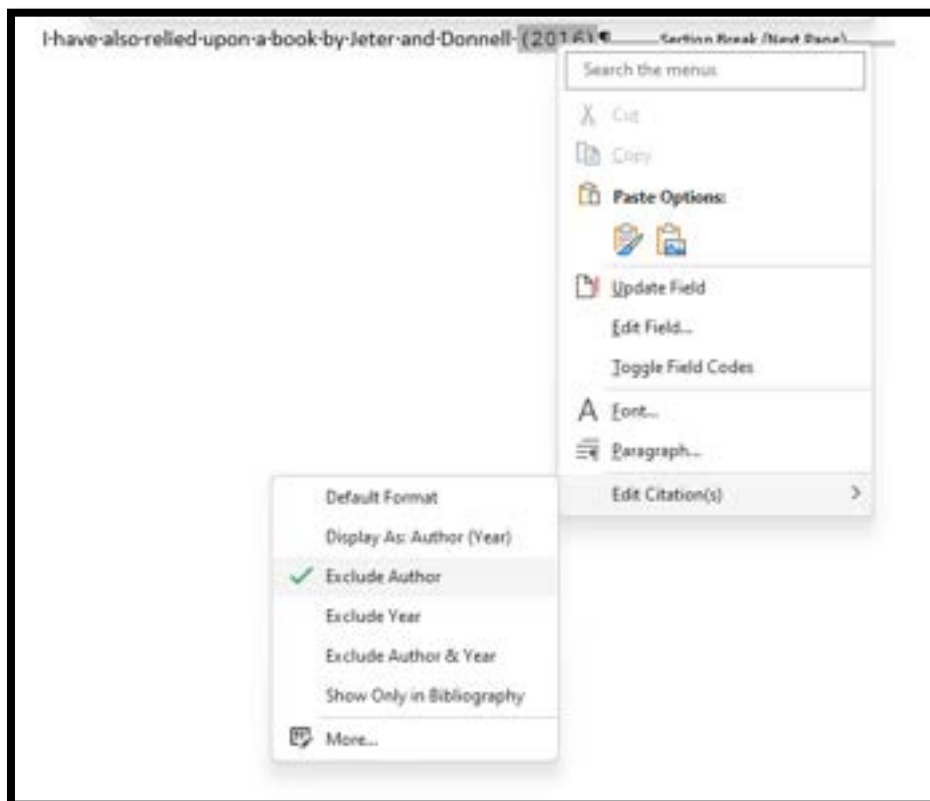


**Figure 16.** With the reference you would like to enter and your cursor placed in the place you would like it in MS Word, hit `alt-2`, and your reference appears in the specified format in the desired location.



**Figure 17.** the citation, (McConnell and Xiao 2022) appears where the cursor was placed after `alt-2` is pressed from inside either the EndNote application or the MS Word application.

One feature of EndNote™ that I use extensively is its citation editing feature. I particular, when making a citation to a reference, and I want to use the author'(s) name(s) in the sentence, I will use the dropdown by right-clicking on the citation and selecting exclude Author name



**Figure 18.** To exclude author names from a citation, select `Edit Citation(s)` → `Exclude Author`

## 8. Making it Pop

### Exercise

Write a macro to add a border to an embedded image.

### Footers

Be very careful with putting cross-references to headings in your footer. This can lead to “page bloat.” Instead consider hard-typing footer content.

### Index

To turn off Index entries in the body of your report, Try File → Options → Display → Hidden text

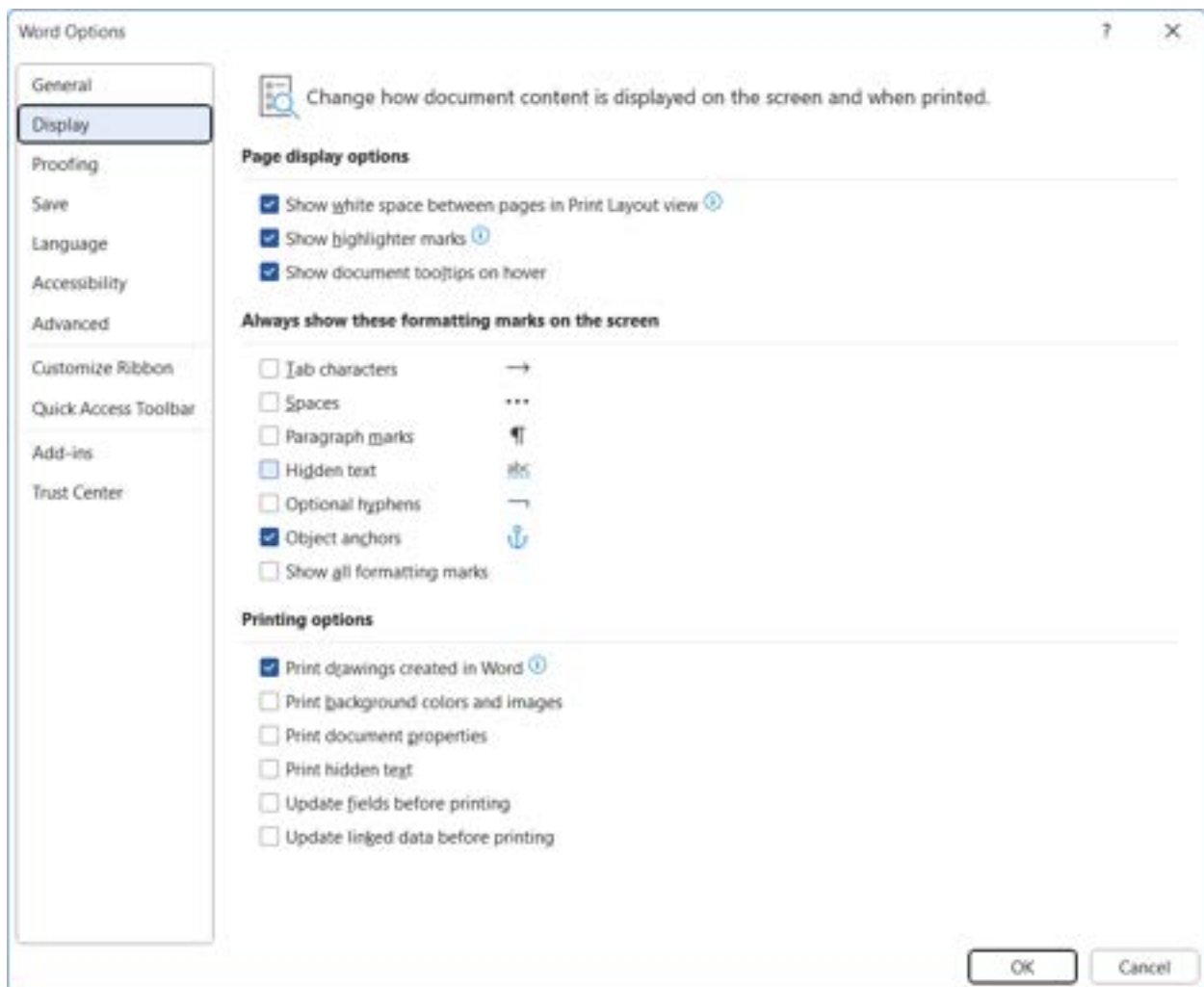


Figure 19. Turn off hidden text

## 9. Cleaning It UP

### CTL-SHIFT-8

This little-known but highly coveted skill will help you solve many of the mysteries of MS Word that have likely been plaguing you.

By hitting `ctl-shift-8`, you will be able to toggle between seeing and not seeing the formatting characters such as space, tab, and paragraph return.

Left click then right click on a Figure number or Table number to bring up the update menu

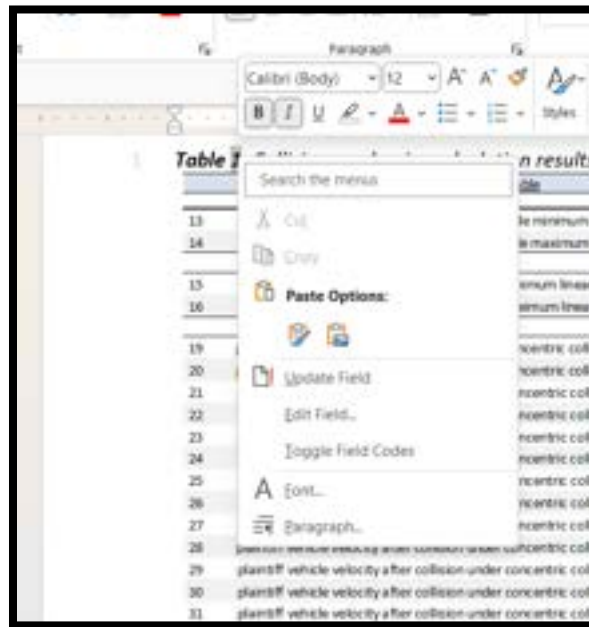


Figure 20. The “1” in Table 1 is highlighted after a left click. A right click brings up a menu which includes Update Field.

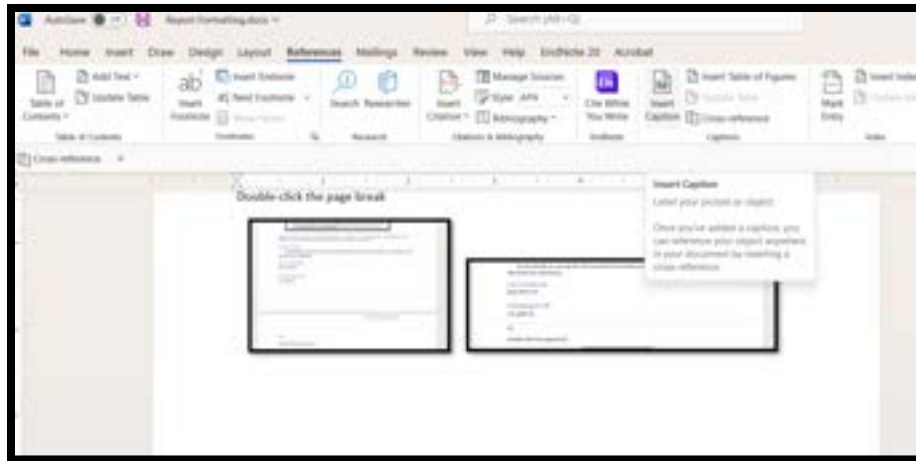
### Updating your Autonumbering with Naughty Number Nine – the F9 key

Start with a CTL – A to select the entire document, then hit F9 (usually just above the 8 key).

T

F9 not working?





**Figure 23.** Notice how the right image removes nearly all the whitespace at the bottom of the top page and the top of the bottom page.

## 10. Windows Management

### Split Screen coupled with hidden header and footer

When working within a complex document, it is frequently desirable to be able to view two portions of the document simultaneously. For example, you may want to be viewing the table of contents along with the body of the document, or the reference section along with the body of the document.



Figure 24. Go to View → Split to split the window.

### ALT-SPACEBAR

ALT-SPACEBAR brings up a menu with six [6] commands

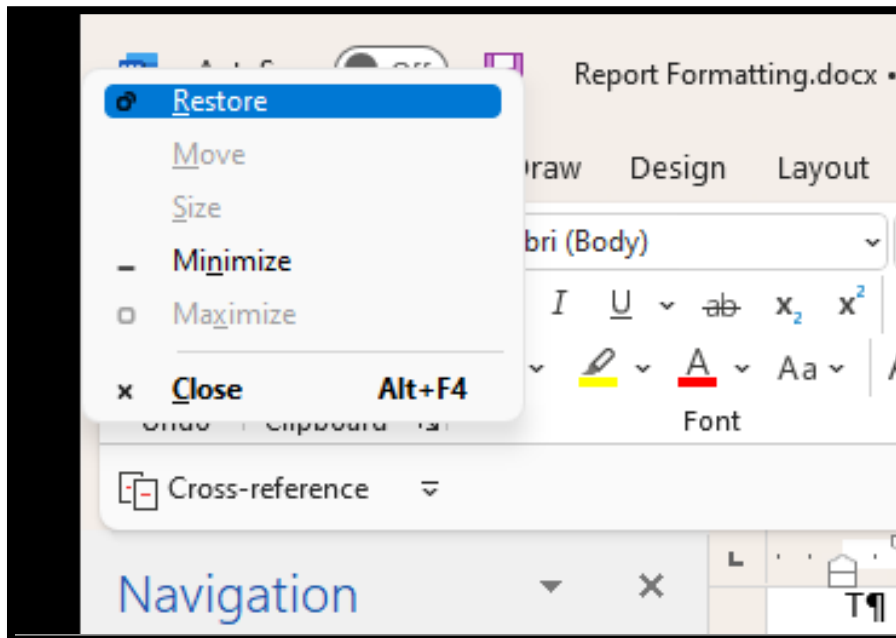





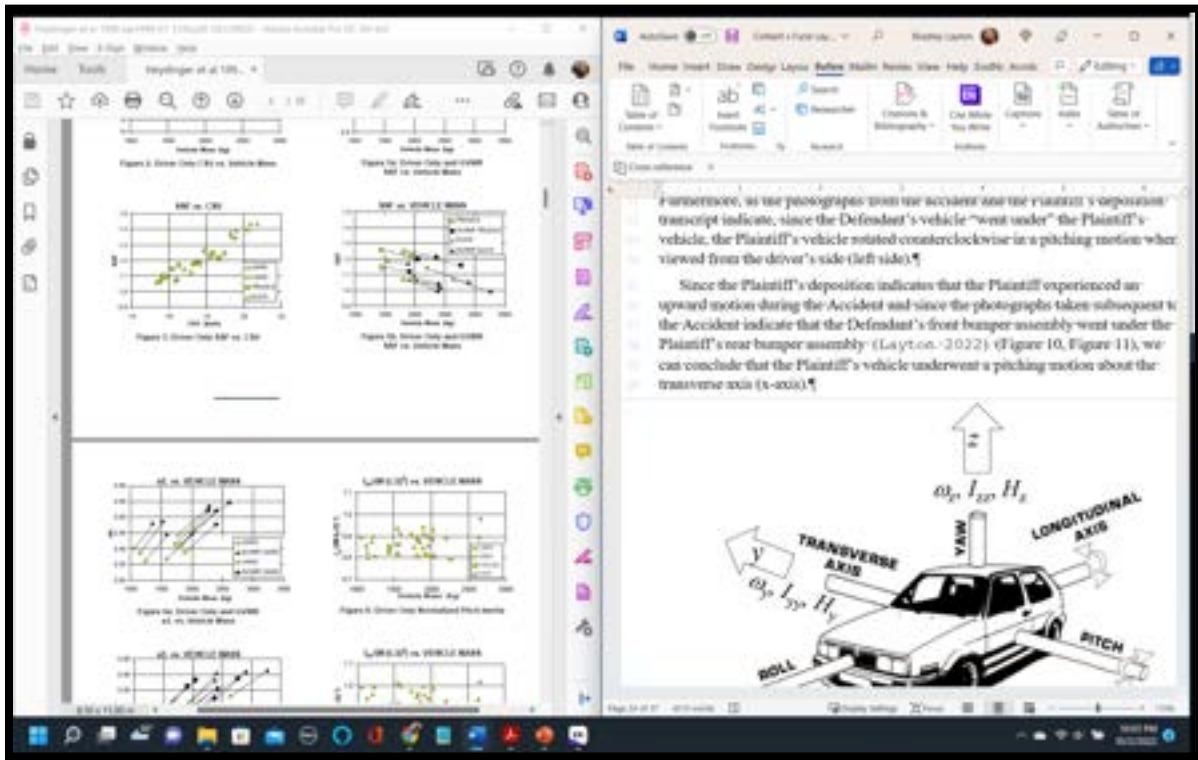


Figure 25. ALT-SPACEBAR brings up a handy menu for manipulating a window. Use this if you're having mouse issues.



Split the screen with  

This set of keystrokes will justify the windows on your screen. For example, you may be reading a pdf and editing in MS Word and want to have both windows as large as possible without wasting valuable pixels on other windows you are not using. With  , or combinations of   . See **Figure 25** for an example of what this window organization looks like.



**Figure 26.** In this image, we can see that we are using the entire left half of the screen for Adobe and the entire right half of the screen for MS Word.

You will also see that by hovering over the “maximize” icon in the upper right corner of a window that you can select its location on the particular screen you are working on (**Figure 26**).

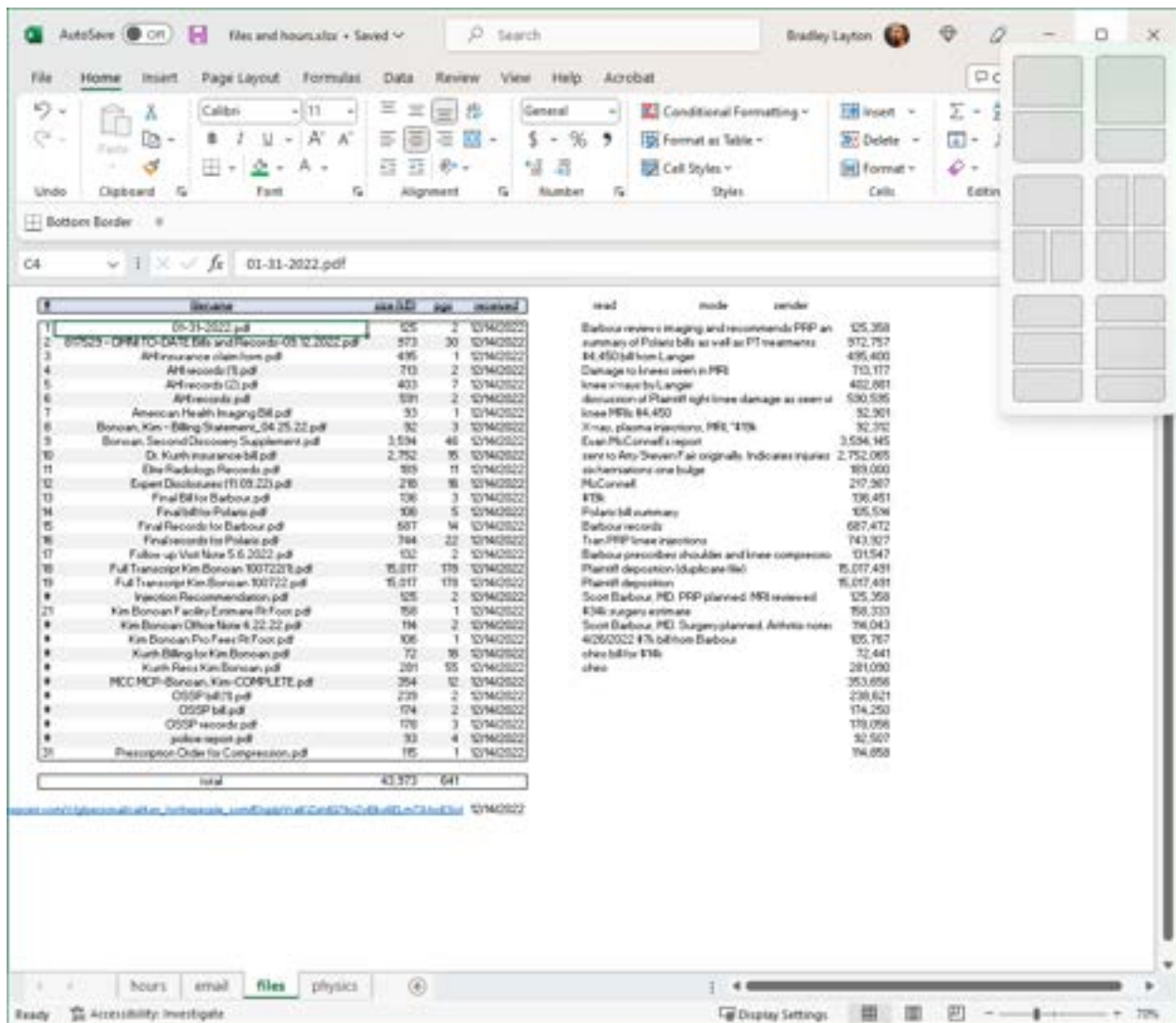

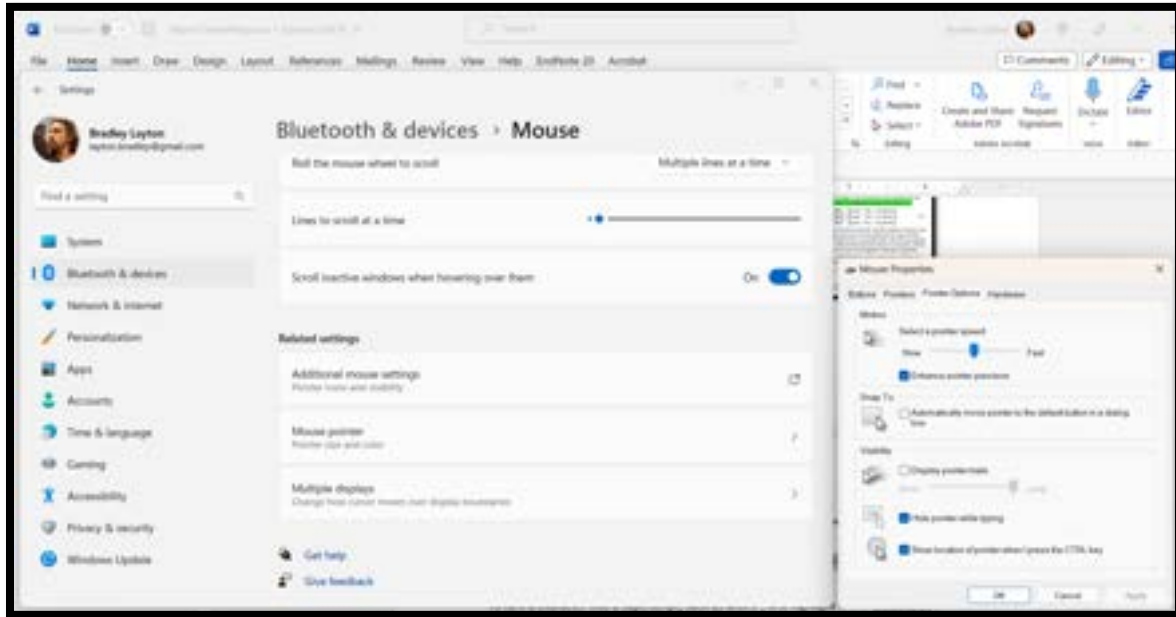



Figure 27. For this particular window, I wanted it to appear in the lower half of the screen so I selected the lower pane of the top left option.

Where's my mouse pointer anyway?

Set up your laptop to highlight the cursor whenever you hit the **CTRL** key. To turn on this feature, go to  → Settings, etc., as seen in **Figure 26**.



**Figure 28.** To turn on the cursor locator on your system, go to  → Settings → Bluetooth & devices → Mouse → Additional mouse settings → Mouse Properties → Show location of pointer when I press the CTRL key.

## 11. Further References

One of the best references I have encountered for general report preparation is Tufte's "Visual Display of Quantitative Information" (Tufte 2001).

SEAK also has excellent references that include finer details on expert witness report content, e.g. (Mangraviti, Babitsky and Donovan 2014), as well as a course by a similar title.<sup>2</sup>

I have also relied upon a book by Jeter and Donnell (2016)

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<sup>2</sup> <https://store.seak.com/how-to-write-a-bulletproof-expert-witness-report-june-6-7-2023-live-via-zoom/?showHidden=true>

## 12. References

- Jeter, S. (2016). Writing style and standards in undergraduate reports. Glen Allen, VA, College Pub.
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