Macros – Who Uses Them and Should I?

To the Collective:

I just listened to Asian Efficiency Podcast (TPS241) on automation and the bit on Macros has piqued my interest. I've always thought they were too tech-ie and "above my pay grade."

Does anyone on the List use them?

What sorts of tasks and how many links in the chain before it becomes too overwhelming?

TIA

For starters, I think any icon you click on in any app is a macro. So we all use them. Beyond that, I use self created macros in two main places.

One, I have shortcuts on my Windows tool bar and in web browsers that I added.

Two, I have quite a few macros created in WordPerfect, some I created, some stock, and some created personally for me. They have saved me hundreds of hours of time over the years.

For example, click an icon and my letterhead opens, letter is dated, cursor moves to where I start typing. Click an icon, client mailing list opens, search box opens, type name, hit enter, client name and address found. Highlight, click another icon, name and address are pasted into open letterhead.

Document assembly works in a similar fashion. I can create a customized 30 page fill-in-the-few-blanks Will in less than 5 minutes.

Not sure how you would count the links in the chain.

Henry R. Reckler, Colorado

I use and have used macros in Excel for moving large amounts of data around. For example, suppose that a bank gives you deposit or credit card activity in a .CSV file and there's 3,000 rows. You want to pull out just the date and merchant name or otherwise perform the same routine operation on all 3,000 or 20,000 rows.

I know you can apply the same automation idea to other functions on a computer using scripts (I think that's what they are called. I might be wrong). I always thought automating routine tasks on the computer was one thing that could really bump the typical knowledge worker's productivity way up. I haven't run in to software that easily allows for automation, though.

Andy Chen, California

Did you say WordPerfect? I've heard of that. Does it come with an abacus?

Jerry W. Cain, Jr., Georgia

Abacus good.

Henry R. Reckler

About the WordPerfect macros that you developed:

1. what instructions/procedures did you follow?

2. is there a guidebook for setting up macros in WordPerfect?

3. did you hire someone to set up most of the macros in WordPerfect for your practice? The ones that were created for you --- can you give me the name and contact info of the pertinent party?

Thanks very much for your email to the group. I stay with WordPerfect, if only due to reveal codes and the more intuitive feel of WordPerfect.

Roberta Fay, California

Roberta, I will be happy to answer your questions, but I am by no means a guru. There are many on the list far better with WP.

1. I am now using WP X7. I haven't found a reason to upgrade from there. But I started with Smana Word and the graduated to WordPerfect 5.1 for DOS in the very late 80s. So I have been at it for over 35 years. As I recall, back in the day the manuals were voluminous, and meant to be read, and at least in part I did. That was the start. But from there, I simply learned from doing. In more recent years I have created less macros, but if you want to give it a try my way, start here. WP macro files are all .wcm files. You can do a search and see where they are located. Double click a wcm file and it will run the macro. If you see one useful as is, you can put a link to it on your tool bar. Next step, if you want to modify one to suit you, open WP, go to tools|macro|edit, and open a simple macro file in the editor. You can see the details, and modify them, and save the result (IN A DIFFERENT FILE SO YOU DON'T DESTROY THE ORIGINAL). Trial and error.

2. I expect there are a number of guidebooks, but I do not know of any. There are, or at least used to be, many online sources to explain issues and provide free macros. I haven't had occasion to look for some time. Try https://www.wptoolbox.com/ and for sure https://www.macros.koenecke.us/ . The latter is Michael Koenecke's work. He is our resident guru.

3. I probably have about 2 dozen macros I use. I created and set them up by myself, with one exception. One document assembly macro I had created many years ago stopped working properly. I hired Michael Koenecke to update if for me about 15 years ago. He rewrote it from scratch, as I recall. It took a few drafts. Then I then modified it for use in other situations. However, much I paid Michael was not enough. It has been invaluable.

If you have specific questions, I would be happy to walk you through anything off-list to the extent of my limited knowledge and ability. The one bit of fatherly advice I would offer, after playing with macros for over 35 years, is don't get started unless you are inclined to follow through. It is addicting to get it just right, but frustrating, can be a serious problem, and is definitely time waster if a macro doesn't do exactly what you want it to do.

Henry R. Reckler

This is great, thank you! Henry, I really appreciate your offer to talk to me off-line. If appropriate, at the end of this week or next week, I will contact you about this subject area. ((I cannot find a "legal typist" or experienced "typist" for my practice needs here locally, and this creates a real bottleneck for me. That is the basis of my desire to follow through and create suitable short-cuts and/or macros.))

Roberta Fay

Henry's quite right. A few added comments:

Gordon McComb is kind of the ultimate WordPerfect macro guy. He has a step-by-step macro tutorial available on his site: http://www.gmccomb.com/ .

I got to give a talk at an ABA conference some years ago, and have left it and its materials up on my Macros site; perhaps that might be helpful to you too. (http://macros.koenecke.us/aba).

I, personally, just learned by experimentation and reading Help files.

It's also helpful to use the Record feature within a macro, do some things, and see what the resulting code looks like. I'm happy to help others with their own macros too. As a general principle, do keep thinking about variables in the environment, and how they might cause your macro to either crash or produce something unexpected.

Since, like Henry, I've pretty much had my go-to macros set for years, more recently I've been into tweaking my merge forms for more efficiency and usefulness (especially with respect to estate planning forms). For instance, some years ago I was pleased to come up with a macro I called MultiMerge, where you would have a list of forms for, say, estate planning or business organization, and they would all be merged at once with the same data file. I figured out fairly recently that I could obtain a similar or better result by tweaking a macro called MergePlus, which now has the option to merge all form or shortcut files found in a particular folder at once (and has a "One Step" option to go straight to the end documents).

It works pretty well, but is different from how I thought things worked best years ago. It's always fun to figure out a new way to enhance efficiency. Please let me know if I can be of any help as well.'

Michael A. Koenecke, Texas

Thanks very much for sharing all this info! I will definitely follow through. Henry and Michael are wonderful to share their experiences and ideas with all of us.

Roberta Fay

Love the List.

Thank you for the tips.

I have my work cut out for me.

Be well.

Michael J. Sweeney, Connecticut

There are more to macros beyond WordPerfect. I am a Mac user and use macros in AppleScripts and Automator to not only do advanced word processing but also to a host of file management tasks. These macros can also be used in conjunction with "regular expressions" which is useful for really powerful searches.

Ernest Schaal, Japan

No but you forgot a slide rule with rule!

Randy Birch, Utah

I still have mine from high school, but I don't remember how to use it.

Henry R. Reckler

We always used WordPerfect, and I had about 50 macros for use in letters.

As such, I could often crank out a full-page letter in just a couple of minutes. We used the same sentences in much correspondence, and after a time I could hear just the first couple of words in my dictation and anticipate the rest of the paragraph. We put out a lot of mail each day, due in part to the previous secretary's creation of macros. I just added to the collection.

Marilou Auer, a retired legal secretary

I use macros all the time. I have a little app called TypeItIn and a companion app called PasteItIn that I use multiples times a day, every day.

You just push a button on the floating app, and it types in stuff wherever you want - like my name, address, phone, email, or legal boilerplate, even entire agreements, etc. Very useful when responding to discovery requests/objections. Paid very little for apps - they are sold here:

https://www.wavget.com/ (i have no affiliation with them).

Eugene Lee, California

I use macros in various places but I also love to use autoreplace. this is a user-editable feature in MS Office which will take a set of letters and expand them into a longer word/phrase.

Depending on your practice there will be a benefit to both. Macros store more information, and they can provide a much larger speed benefit--but they are more specialized in terms of uses and take longer to set up.

Autoreplace seems (at first) like it won't make much of a difference but it will radically increase your typing speed and accuracy which also has a benefit.

So, for example, i have all my local towns coded:

vhvh=Vineyard Haven

vhvhvh = Vineyard Haven, MA, 02568

I have myself coded:

eheh = Hammarlund Law Office

eheheh = Hammarlund Law Office, 10 State Road Unit B-3, Vineyard Haven, MA

02568

I have single words coded:

pfp = plaintiff

pfps = plaintiffs

jsj = jurisdiction

jdj = judgment

ctc= Constitutional

ctcy=Constitutionally

i have phrases coded:

dcrd = Dukes Country Registry of Deeds

rdcrd = recorded at the Dukes County Registry of Deeds at Book

and so on.

Erik Hammarlund, Massachusetts

This immediately made me think of Ross Kodner and his ranting and raving about how horrible MS Word is. Many of us remember the huge debate about Word Perfect vs. Word on Solosez.

That said, a woman gave a presentation on Word at Techshow two years ago and it was great. I would love to really understand it and maximize my use of it. Does anyone remember her name?

Recommended books? I still have those TechShow .pdfs on my phone with the intention of reading them.

Andrea Goldman, Massachusetts

Firm,

I use a program called ActiveWords that will search and replace, go to websites, go to documents, folders, etc. from across all Windows programs.

For example:

x = X-1 Search [You can type the "x" from anywhere. You don't have to find the stupid icon.]

511 = Cary, NC 7511

526 - Fuquay Varina, NC 27526 [I do the same thing for a dozen Raleigh zip codes. I just need to know the last three digits.] robg = Royal Oaks Building Group, LLC [I really like this one]

wp7 = WordPerfect X7

ss = §

pp = ¶

hf = ☺

js = opens my default scan folder from our large scanner mem = opens a new email to Michelle in Outlook

It also handles misspellings, contractions and other stuff, some of which I don't understand.

You can add stuff on the fly. It is great for that unusual foreign name of 25 characters that you need to type 25 times in a real estate closing.

I like being able to use the same shortcuts across most of the programs I use.

One bad thing is you get to where you just pound out stuff and forget spellings and contractions because you don't have to know them.

Nope, no commission or kickback to me, just a happy user!

The president of the company is an attorney and lurks here on occasion. We may get a comment from him . .

I can't remember if the following is his mantra or one I came up with:

Goal: Avoid doing stupid repetitive tasks! Eliminate crap so you can concentrate on the hard stuff!

A question for the Word macro experts. I grew up with WordPerfect and their macro/merge language. Can I do everything in Word I could do in WordPerfect? I have several forms I need to convert to Word.

t = Thanks!

Jim Pardue, North Carolina

Roberta,

I think I pay $30 each year as a single user of Active Words. It is so worth it to me. It just makes my life easier.

I compare it to whether or not I should embed my commission expiration date onto my notary stamp. The notary training classes in NC recommend that you don't put the date on the stamp because you will have to change it . . .every five years. I estimate that in doing 6-800 real estate closings a year I will notarize 6-8,000 documents over five years. I am delighted to pay $5 for the new notary pad to avoid remembering and writing that date 6-8,000 times. And that assumes that I don't wear out the plastic self-inking contraption and have to replace the whole thing anyway. Yes, I splurge on the self-inking style and dispense with the ink pad too.

Remember the goal:

Avoid doing stupid repetitive tasks! Eliminate crap so you can concentrate on the hard stuff!

YMMV.

Jim Pardue

Thanks! Never would have thought of these things.

Roberta Fay

Was it Adriana Linares?

Disclaimer: I have never been Adriana Linares, nor a lawyer. My lawyer is also not Adriana Linares.

Ben M. Schorr, Washington

I use ActiveWords (and have for a long time). It is similar to autoreplace, but works in every app, on the web, etc. So I have my address coded and when I have to fill it in anywhere it is just a few keystrokes. I use it in my timekeeping program (PCLaw) for descriptions of tasks that I do regularly.

It is really powerful and has saved me a lot of time. In addition to autoreplace, I use it to open documents I use a lot, open programs, and open websites. I have used its scripting function to do more complex tasks like "take this document, add a custom header, add visible gridlines on the table, and print in landscape".

Caroline A. Edwards, Pennsylvania

I am pretty sure the $30 annual charge is for a personal license, meaning that you can download and use ActiveWords on multiple devices if you are the sole user.

Caroline A. Edwards

I make heavy use of the auto correct for:

Town (with abbreviations and zip code and full spelling w/o zip code)

Town County State

[Municipal] Land Records

[Municipal] Town Clerk's Office

l/nofo = land now or formerly of

a/sosm = as shown on said map

All in Word and Excel documents

How about for file naming when in a dialog box?

YYYY.MM.DD Ltr 00X (Addressee) - Annnotation

What about in Acrobat full version?

Does anyone have thoughts about

Phone Numbers/ SSNs / EINs

e.g.

Tel;2032449522

becomes

(203) 244-9522

Excel has this for cell format... can it be done elsewhere?

As I dabble in the Google Docs and Sheets, I am looking for similar functionality. If Windows goes to seat licenses the way Office has, I need a Plan B

Michael J. Sweeney, Connecticut

 I use AutoHotKey language to make macros or text substitutions that work with most software applications.   I primarily use AHK for text substitution, entering the letters 'zc' (without pressing any other key or spacebar) places the signature block to any email I am drafting. I have another code to enter signature blocks to the few letters I write, I can fill out web site forms or enter user name using AHK.   Other scripts or substitutions may include two or three letters to insert   '§ ' in a pleading.

The official website with downloads and user forums is at www.autohotkey.com.

Other resources discussing AHK ,

https://www.pcworld.com/article/186661/Automate_Common_Tasks_with_AutoHotKey.html

I recently read about software to write scripts for google apps/android. https://www.howtogeek.com/410451/how-to-supercharge-your-google-apps-with-the-script-editor/

I have not used the software. There is a tutorial offered by Ben Collins about drafting macros for Google documents, https://www.benlcollins.com/automation-with-apps-script

<https://www.benlcollins.com/automation-with-apps-script/?utm_source=mailchimp&utm_medium=email&utm_term=friday-cart-closes&utm_content=enroll-in-automation-with-apps-script&utm_campaign=automation-apps-script-launch>.

There is a $ 199.00 cost. Registration ends on May 3, 2019. I have not taken the course and am not paid to promote the course.

Richard P. Schmitt, Maryland