



Practice Tip

Going Native: Using Word 2007 With Enhanced Native Architecture

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With the introduction of Microsoft Office 2007, many firms are reviewing their template and macro packages for Word before they upgrade. Since the look and feel of Word '07 is so different, the migration is a significant upgrade and new training is needed. Now is a good time to review the integrated products, discover what is available natively in Word, and make a change if necessary.

An Evolution of Built-in Functionality

When the initial migrations to Word began in 1997, the aversion to it was so strong, many firms used templates and macro products in an attempt to mask it as much as possible. End users were “shielded” from encountering native features for formatting and paragraph numbering. These were the features causing the greatest grief.

Paragraph numbering solutions were developed to replace Word’s built-in functionality — to make it more like WordPerfect. The resulting solutions were quite clever. In some cases, Word could do what it didn’t even know how to do natively. End users were happy, but clients weren’t. Actually, anyone not using the same product was not very impressed because some aspects of the document wouldn’t behave properly. Any component related to paragraph numbering, such as a table of contents or cross-references, wouldn’t work in a different Word environment. The same tool was required to update the table of contents to maintain consistent results. It could be quite embarrassing for clients to uncover the dirty little secret behind the document. It was smoke and mirrors. The document was not what it appeared to be.

Eventually, a fix for the numbering solution was provided so that documents could travel outside the firm’s environment and then return to the firm for further editing. The non-Word elements were converted to native Word functionality before sending to the client and then converted back for use internally. Some end users would be very diligent about including this extra step, others just gave up and decided to just deal with the consequences. This still resulted in frustrated collaborators, confused that the table of contents could change so drastically or, in some cases, be irreparably broken.

There were other issues. Trainers soon realized it was a disservice to end users to completely replace Word's functionality. I have heard some decision makers state emphatically, "I don't want my users to see Word. They don't know what to do with it." That statement overlooks the impact the right tool and skilled training bring to the problem.

Leveraging Native Architecture

Ten years later, the thinking has evolved to recognize the power and benefits to enhancing native Word. A template and macro package should fit inside Word. The look and feel of the product should blend in. This actually reduces the learning curve in adjusting to the new product for those already familiar with how Word works. Use of the product will be more intuitive.

Third party tools should assist the document formatting process to achieve greater efficiency and accuracy, not replace it. If a feature already exists, leverage it; don't re-invent it. If it's broken, fix it.

Microsoft Word has many useful tools suitable for satisfying the needs of the legal industry. They're just all over the place. Maybe no one knows they exist or it requires too many steps to reach them. Bring them out of hiding and make them prominent — create a custom toolbar or ribbon to make helpful features more accessible. The ribbon technology is a great way to group and label related buttons. For instance, end users need obvious methods to apply styles, modify styles, and view commonly used styles. Place those tools on a ribbon and include a descriptive name for the group.

Tools should follow the work process and improve the workflow. The process of formatting usually begins with viewing styles, then applying styles and then modifying styles. Users should be able to view the placement of styles in the document and view the list of styles available. Consider the various techniques for applying styles and address each.

Consider the features that users struggle with other than styles and numbering and assist those also. I find that users have difficulty adding new sections to a document, such as a table of contents, and then formatting the headers and footers of these sections properly. This can often make the difference between completing a document in minutes or hours depending on the skill level.

Automation tools can help level the playing field and reduce the learning curve. Those users that struggle with adding a new section can be assisted with automation that completes the process for them. Consider the entire process though. It's not enough to simply insert a section. Include an appropriate page title and page number.

Microsoft Word is a powerful product, but complex. Without the proper tools, it can be difficult to use and train. While the tools should not overcome the parent application, they should simplify complex processes, improve features so they suit the needs of the end user and reveal hidden features.

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