Document Renovation  
Reducing the Time Spent Reformatting and Cleaning Up Documents in Microsoft Word  

By Randall Farrar, President, Esquire Innovations, Inc.  

Introduction  

Documents are the currency of Law firms. Attorney’s author, edit and submit thousands of documents daily. While content is the most important aspect of legal documents, and the majority of time should be spent on this, the formatting of a document can often create issues and burn up precious billable hours. The time spent reformatting and cleaning up documents can be reduced significantly if firms have a process in place for creating and fixing documents based on Word’s best practices.  

The catchall term fixing formatting issues in documents has been traditionally called “document cleanup.” There are powerful and complex tools on the market that do a great job of cleaning up and fixing documents. However, document cleanup is only part of the renovation process, and this part can be greatly reduced if the right tools and training are in place for a firm.  

When a firm develops a process and trains their users on this process, less time is spent creating documents and fixing problem documents. Documents based on Word’s best practices are less likely to cause problems down the road. I like to call this process "document renovation.”  

This article will focus on three areas of document renovation:  

1. Document Planning: Creating and maintaining a document based on a firm’s best practices  
2. Document Repair: Repairing/Fixing any sort of structural or formatting issues in a document in the event it becomes out of order or broken  

Document Planning  

Creating and maintaining a document based on a firm’s best practices  

This is the most important part of the document renovation process. Your users must create documents from a firm’s set of strategically planned templates (i.e. Boilerplates). Firm templates should contain all the approved styles that users will need to properly format documents from the start.
Templates

A template is a document that has existing content, such as text; styles, and formatting; page layout, such as margins and line spacing; and design elements, such as special colors, and borders.

A template is the starting point. If, for example, you often use an agreement and have to create the same agreement repeatedly but with slightly different details every time, starting out with much of the information already in place (template) will greatly speed up your work.

Template Styles

When it comes to work, the attorney's role should be "word-smithing" not formatting text and paragraphs. So much time can be spent in getting formatting to "just work" in Microsoft Word, that word-smithing is shortchanged…resulting in decreased document currency.

Advantages of Styles

Microsoft Word Styles are very powerful. I've seen firms transform their work product (and morale) when users implement styles in their Word documents. Here are some advantages of using styles in your Word documents:

- **Very fast application of formatting**
  All the bold, underlines, font sizes, paragraph indents, etc, can be contained in just one style. In conjunction with the Styles Pane, it takes only one click to apply a style.

- **A modification to a style has global document implications**
  Changing the style once affects all formatting with that style. If you have a 60-page agreement and you need to change the font size on fifty headings in the document, you had better know how to do some advanced find and replace or you'll have to go to each heading and change it manually. With Microsoft Word Styles, you change the style once and it is automatically changed throughout the document.

- **Styles allow a firm to implement its look and feel across all documents**
  When the same styles are used across the board in a firm, the documents have a consistent look and everyone knows how to work with them.

- **Building Tables of Content**
  Using Heading styles makes creating TOCs automatic.

- **Documents are smaller**
  The amount of space a style definition takes up in a document is significantly less than all the direct formatting applied to fonts and paragraphs.
Disadvantages of Styles

- **You must train your users.**
  
  If this is not done or done in a haphazard way (this I’ve seen many times). Users will not use them.

- **The concept of styles can be complex and users will just give up and not use them**
  
  Again, styles training has to be a big component in the document renovation process. Users must know how to apply, modify, and create styles.

- **Naming conventions can be overly complicated.**
  
  Keep style names simple and easy to understand for your users.

Document Repair

*Repairing/Fixing any sort of structural or formatting issues in a document in the event it becomes out of order or broken*

Documents can get messed up, and providing your users with tools and training to help repair these issues is of the utmost importance. There are two approaches to repair and fix. 1) Invest in an off the self-document renovation application (i.e. Esquire Innovations’ iCreate or cleanup tools - Microsystems’ DocXtools.) These have powerful built-in features. 2) Train your users how to use the built-in document repair features of Microsoft Word 2010.

Built-in features of Microsoft Word 2010 for Document Repair

Although I do not have time this article to review in detail all the Word 2010 tools, below are some features you can use to repair document problems:

- Deleting Styles – delete unused styles using the Manage Styles tool or Organizer.
- Replacing Styles – replace one style with another throughout your document using advanced find and replace.
- Reset Direct Formatting – remove direct formatting from selected text or paragraph and restore back to the underlying paragraph style.
- Update Styles from Attached Template - by attaching a template to an existing document you can update all of the styles in that document to the styles from the attached template. Particularly useful if you need to apply firm styles to a document that has come from the outside.
- Repair Outline Numbering using Word’s Multilevel List dialog – if numbering is not behaving correctly make sure all numbering levels are linked to correct style level.
- Apply a different Outline Numbering and Styles Scheme – to change all of the numbering in a document to another scheme use the multilevel list button, even define a new Multilevel list.
- Add Title Marks or paragraph separator to a document – when working with heading styles; use this to mark the text to include in a Table of Contents.
• Globally clean-up manual numbering using find and replace – if the manual numbering has a character pattern, you can search for that pattern and replace it with an auto numbered heading style.

• Paste as Plain Text when pasting content from an outside source.– this removes all direct and style formatting from the original source, placing the copied text into a document applying the underlying paragraph style

• Properly convert a .DOC to a .DOCX - if a document from an earlier version of Word is opened in Word 2010 without being correctly converted, sometimes the numbering does not work consistently, and many of the latest features of Word 2010 will not be available.

**Document Rebuilding**

*Combining both document planning and document repair to rebuild a document.*

Document rebuilding provides your users with a way to easily and safely take text (copy) from one document or outside source and place it into a firm’s template (paste as plain text). Once the text has been repurposed, then document repair may or may not be need to be applied, but the tools and knowledge are already there.

**Summary**

In the past firms have relied on only one component of document renovation, document cleanup or as I like to call it “Document Repair,” to fix problem documents. That is only one aspect of document renovation. The document renovation process encompasses two other steps, Document Planning and Document Rebuilding. All three steps can enable firms to create and manage documents in a much more efficient way.