



Transitioning to Office 2007

Word has evolved. Here's how to make it work for your office.

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It's been almost two years since Microsoft released Office 2007, and firms are starting to make the transition to this radically different version. If you have done your homework, then you know what is in store for your users. Following are some guidelines for a successful transition beginning with Word, the core product in this latest suite.

Word and Son of Word Sequels

As you start to work with Office 2007, the most obvious change is the new user interface. (See sidebar on page 17, "Word 2007 Tabs.") In order to truly appreciate how far the Word user interface has come since firms started adopting Word as the *de facto* document-editing tool, it helps to take a little trip back in time. The first version of Word that I worked with in the legal industry was Word 6. I quickly learned that Word "out of the box" would not work for legal. We needed to change some of the configuration settings to get the product to behave the way we wanted. We needed to customize the style collection so that the fonts and styles were consistent with the way we wanted our legal documents to look.

Word 6 had a little more than 200 commands, which were all managed through menus, toolbars and shortcut keys. We soon discovered that the eight toolbars that shipped with Word were not enough, and we created our own. The standard toolbar quickly became the "firm standard" toolbar. We added buttons that would make usage and adoption by our users easier. Third-party tools were not as plentiful in our world so we started to create our own templates, macros and custom toolbars to handle legal-style numbering.

Over the years, we continued to work hard in developing an environment that would be widely accepted by our users, all with the goal of making it easier and faster. By the time we

got to Word 2003, we were dealing with 19 toolbars that shipped with the product, plus the eight to 10 additional toolbars from add-on products and custom toolbars created for the firm. And let's not overlook the 14 task panes. As functionality continued to grow in Word, Microsoft had to get more creative with displaying the various commands.

If you stop to think about it, Word 2003 is a very complex product that can be difficult to use. So many of the features are accessed through a variety of ways. Great capabilities are buried deep within menus or located as cryptic buttons on toolbars. Visually, Word 2003 is "loud." Experienced users have grown comfortable exploring and working within the interface, but users who try to go beyond their usual tasks in Word 2003 can be easily frustrated.

Once Again, Customization Will Be Necessary

The Word 2007 interface is revolutionary. When you notice the Office button which acts much like the File menu from previous versions of Office, you start to get the idea that this product is different. I've talked to firms that have attorneys already purchasing new computers with Office 2007 installed, and they don't yet know how to open a file. My own first experience was a bit eye opening as I struggled to find some of my often-used features. But it didn't take long for me to adapt and start to enjoy how easy it was to find commands.

As with earlier versions of Word, the legal world will not be able to use Word 2007 out of the box. Of course, we will start with customizing the styles. I am a big believer in keeping your styles simple and modifying the ones that ship so that they work better for your documents. New in 2007 are Style Sets. These allow us to provide custom-designed styles that can be practice- or even document-specific. Rather than having just

the firm standard style set, you will want to build style sets that will make working with styles easier for your users.

Another consideration for customization in Word 2007 is the new Recommended Styles List. When using the task pane, you can determine what styles appear in that task pane and in which order the styles appear. By controlling the styles shown in the task pane, you can serve up only the styles you want your firm to use. This will make it easier for users to apply the correct styles.

The one toolbar in Word 2007 is the Quick Access Toolbar. This is the only area where users can add their own customization. I recommend that you keep or add the more common features that users will want on this toolbar. These might include New, Open, Close and Quick Print.

One of the most important tasks ahead of you is to review what you have customized in earlier versions of Word. What toolbars have you added? What macros have you written and added as buttons on the toolbar? Why were these necessary? Are they still necessary? Do not simply take what you've done in the past and make it available in 2007. It's time for a good, hard look at what your firm has done and why. Keep it simple.

If you decide that you will need to modify the Word environment and add access to commands and features that are not on the Ribbons or toolbars, think about where it makes sense for these commands to reside. If they are frequently used regardless of what the user is doing, it makes sense to add these to the Quick Access Toolbar. If they are used with other features, then perhaps you may want to consider modifying the Ribbons. If you have a custom Doc ID stamp that you created, it would make sense for this to be located on the Insert tab. Adding buttons to the Quick Access Toolbar does not require new skills. Adding to the Ribbon, however, will require knowledge of XML.

Preparing Users for the Switch

As you start to think about introducing this new environment to your users, realize that if the first time you show them the new interface is in the classroom, you will likely spend your entire (and very limited) time trying to convince them that 2007 is a good thing. I've talked with more than 150 firms in the last year and a half about their plans for Office 2007. I've heard of planned training durations ranging from one hour to one day, and some have suggested that we not provide any classroom training at all and just let the users learn from trial and error. Our experience shows that classroom time with your users is essential to avoid a negative impact on productivity once the new software goes live at your firm.

We also recommend that before actual training begins, you announce to your users that Microsoft has made a major change in Word and that they should be ready for the new document formats. Developing a communication plan is a critical early step, and that plan should include a message from the firm's management highlighting the business reasons behind the firm's decision to migrate to Office 2007. The firm's communication plan should start with that announcement and continue until the last user in the firm is up and running in the new environment.

Consider using technology commercials to raise awareness that Office is changing and that staff members need to invest time in training to get ready. For example, "Microsoft has made a big change, and it will affect how you do business. Pay attention!"

Form focus groups that can assist you in the configuration of the product. Tout the new capabilities such as SmartArt, equations and style sets that will be beneficial to specific practice groups. Practice-specific focus groups can help you define the style sets that will be most beneficial to them. Add document parts to the Building Blocks template that will allow users to quickly create specific types of documents. By soliciting product design input from groups of users, you will increase the buy-in this project needs to be successful.

Do live product demos, "Wow!" sessions or product briefings that show the technology and how it will benefit the firm. These types of sessions are usually done prior to rollout but after the product is nearly in its final configuration. The goal of these sessions is to explain why the firm is making the change, to sell the user benefits of the new software and to enroll users in a variety of learning plans. Get on the agenda of the firm's practice group meetings or associate meetings rather than trying to group the attorneys yourself.

Pre-learning is critical for Office 2007. Include e-learning pieces that can be pulled together in a variety of learning plans to educate the users on the new terminology and interface prior to coming to the classroom. Manage this in your learning management system so that you can verify participation in this important part of the overall communication and education strategy.

If you are faced with short classroom durations, your classroom training will focus on just those items that will allow for optimal productivity beyond the deployment. This is not the time to show the new SmartArt, charts or equations. Make sure your users have a good comfort level with basic document processing skills in the new environment.

Post-rollout floor support will be critical for an Office 2007 migration. Dispatch subject-matter experts and trainers to provide desk-side assistance with the new technology. Track all visits to document any issues that may be training-related. Use checklists to reinforce specific learning objectives. Your casual users will adapt more easily to the new interface. Pay close attention to your more advanced users; they may be frustrated at first as they know where to find the commands in 2003 and will need to relearn where they are in 2007.

Spreading the "Word"

Even if your firm is not migrating to Office 2007 this year, start educating your users now on what to do with Office 2007 files. Put processes in place to handle the types of files your users are receiving. Depending on the version of Office you are currently using, your approach to working with these files and making sure you keep the integrity of the documents intact will vary. How you handle a Word, Excel or PowerPoint file from Office 2007 will differ based on what 2007 features are being used. This is going to require putting guidelines into place for users to follow.

Although Microsoft has done a good job of addressing the different file formats by making the Compatibility Pack available free of charge to anyone, the Compatibility Pack is not going to allow for smooth transfer of files for all situations. The software itself is a conversion tool that will allow a 2000, 2002 and 2003 Office user to open a 2007 document. Since the file is converted as it is opened, it will need to be converted again when sent back to the 2007 user. This converting back and forth is similar to the “round tripping” that we dealt with when going from WordPerfect to Word. Identify what version of Office your firm is currently using. Conversion from 2007 to 2003 is better than from 2007 to 2002 or 2000. Determine which features in Office 2007 are being used in the received file. SmartArt and equations have changed significantly in 2007. If these features are present in a document that is converted to 2003, the user is left with an image, not an editable object. That could cause problems converting back to 2007. Be aware that with the large number of rows and columns in Excel and the larger amount of text allowed in a cell

in 2007, it is possible to lose the content in an Excel file when converting to 2003. Don't learn these lessons the hard way. Educate yourself and prepare your users for 2007 file formats.

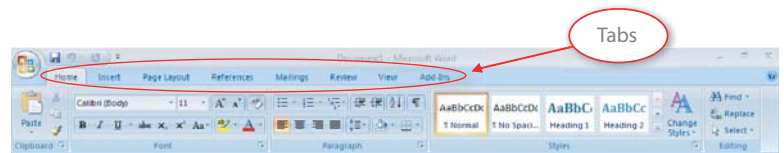
I know of firms that have put the Compatibility Pack on the desktop of all users and are allowing the users to simply open the files, work on them and send them back. I've also talked to firms that are having all 2007 formatted files sent to the Help Desk for evaluation and conversion. This allows someone who is knowledgeable on 2007 to evaluate the document and see what is in the file that might cause problems in 2003. Find the Word 2007 experts in your firm and identify who needs access to the technology now. Now is the time to put into place the processes your users should follow when they receive a 2007 formatted file. Train on those processes. For those files that should remain in 2007, make sure you have resources that can aid your users in editing the files. It may very well mean that you will need to start training some users on Office 2007 well before the firm's move to the new software. [1/26](#)

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Word 2007 Tabs

Across the top of the screen just below the title bar, are the **Tabs** you use to navigate to a wide variety of commands. Within each of these tabs are the commands, which are laid out in what Microsoft calls a “Ribbon” and organized into groups such as Font, Paragraph and Styles.

The tabs follow a very logical layout. To truly appreciate the layout of the Tabs, you have to go back to the best practices of using Word. Remember that a Word document is a container. The container

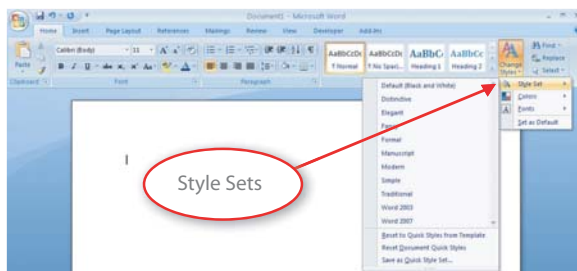


Think of the **Home Tab** as the area where you start crafting your document. Even if you plan on borrowing text from other files, the commands for cut, copy and paste, as well as the Office clipboard, are all right there. And doesn't it make more sense to copy out of a document the things you want rather than open an old document and remove what you don't want? If you start with a blank document window every time, you will have better documents.

Once you have your text in the document, you can then start formatting both the text (font formatting) and the paragraphs (styles for the most part). All these features are found on that Home tab. Once you have the document text, you can then start adding additional objects into the document.

The **Insert Tab** contains commands for you to add cover pages, tables, headers and footers. Many of the features (such as tables, headers and footers and SmartArt) will have additional tabs of commands available. These contextual Tabs will only appear when they are needed. Create a table and the table commands appear, making it easier to format with the table tools that should be used. This prevents cluttering the desktop with hundreds of commands that you seldom need.

As your document continues to take shape, you will want to start looking at the layout of the document. The **Page Layout Tab** holds the page setup commands. The **References Tab** has the commands for footnotes, table of contents and table of authorities. The Mailings Tab will only be needed for mail merges and to create labels or envelopes. The **Review Tab** contains all the proofing tools users are familiar with and track changes. The last tab is the **View Tab** containing the various available views and zooms.



itself holds all the styles and formatting you will need for your document. When starting a document with the Normal template, you will have just the basic style collection along with all the formatting you will need for text formatting, page layout and section formatting; plus special tools for reviewing and preparing your document. Other styles can be accessed from the **Style Sets** button.

If the command you are looking for is not exposed on the Ribbon, click the **Dialog Launcher**, which opens a dialog box with more of that group's commands (which is why I like to think of it as the “More” button).

