

**Microsoft Office Word 2007
for the Legal Community**

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Partnering for Productivity


PayneGroup

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Word 2007 for the legal community

Microsoft® Office Word is a tool that is widely used through the legal industry for creating and sharing documents. Office Word 2007, part of the 2007 release of the Microsoft® Office system, has made a number of investments specifically intended to improve the experience for users in the legal profession. This document is a brief highlight of these new features.

Better editing experience

Word users in the legal community have expressed a desire to re-create frequently used content within their documents. Because disclaimer text, header information or other commonly used content is shared in most of the documents organizations create, Word 2007 introduces a way to create and store “building blocks” of this information so that it can be easily applied to new documents. Improved bulleting and numbering within Word ensures that users who create content aren’t frustrated by trick or unpredictable formatting. Word 2007 can also help you create and automatically format references within documents, even updating them according to the style guide you’ve selected.

Document collaboration

One of the most common uses of Office Word is the exchange of documents for review and commenting. Because Word documents are easily exchanged as attachments, as part of document repositories, or through other means, people can use a familiar environment for adding their feedback to documents.

“Finishing” documents

After a document review has been completed, publishing that document to the intended distribution channel must be done in a way that does not put sensitive information or comments at risk. Office Word 2007 has taken considerable steps in making the publishing process for documents safer; organizations can now use new, built-in tools inside of Office Word 2007 to help them remove comments from documents, prevent unwanted changes, and digitally sign them.

Microsoft® Office SharePoint® Server 2007 and Microsoft Exchange Server 2007

Companies are increasingly challenged with compliance regulations. Although many have started using electronic business and document management processes, it can be difficult to start managing and auditing electronic business records. Office Word 2007 in conjunction with Microsoft® Office SharePoint® Server 2007 and Microsoft Exchange 2007 offer a robust solution for records management, archival and document-based workflow solutions.

Open XML Formats and solution development

With Office Word 2007, organizations can develop more sophisticated templates than ever before. Using the new Open XML Formats, content controls, the new document information panel and other functionality, you can now build templates that connect to external data sources for new information, or “tag” content within documents for later extraction or reuse.

Better editing experience

Office Word 2007 allows you to define building blocks to help you put together a great-looking document with ease. Presented in visual galleries for easy browsing, these building blocks are professionally designed content that you can use to assemble your documents. They include ready-made cover pages, headers, footers, page numbers, pull quotes, sidebars, and other commonly used document building blocks.

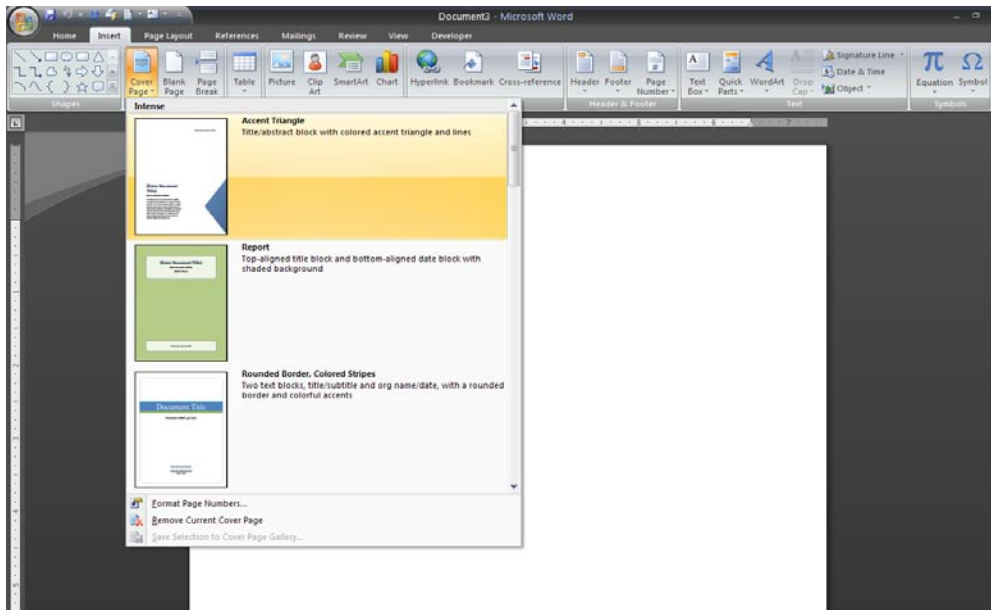
Templates will also include additional parts tailored to the specific document type they help you create—for example a financial report template will include cover pages, headers/footers, etc. that suit such reports.

Building blocks are mostly located on the Insert Tab, where you will find galleries for the following types of content, shown in the screenshot below:

- Sample pages with content
- Cover pages
- Tables
- Headers
- Footers
- Page Numbers
- Text Boxes (pull quotes and sidebars)
- Quick Parts (custom parts)
- Equations

On the references tab, all reference tables (contents, authorities, figures, indexes) are galleries of pre-built content. On the Page Layout Tab you will find a watermark gallery while the Headers and Footers tab repeats the header, footer, page number, and quick parts.

The contents of all building block galleries are stored in templates, so it is easy to extend the built-in sets with custom content. They all use a visual style to preview and insert content like many other features in Office. However, despite their similarities, they should also be viewed as individual features. For example, cover pages will insert at the beginning of the document as expected, headers go in the document header area and repeat across all pages, and textboxes are inserted in the page the cursor is in.



Insert Tab showing the expanded Cover Page gallery.

Creating Building blocks for Your Template

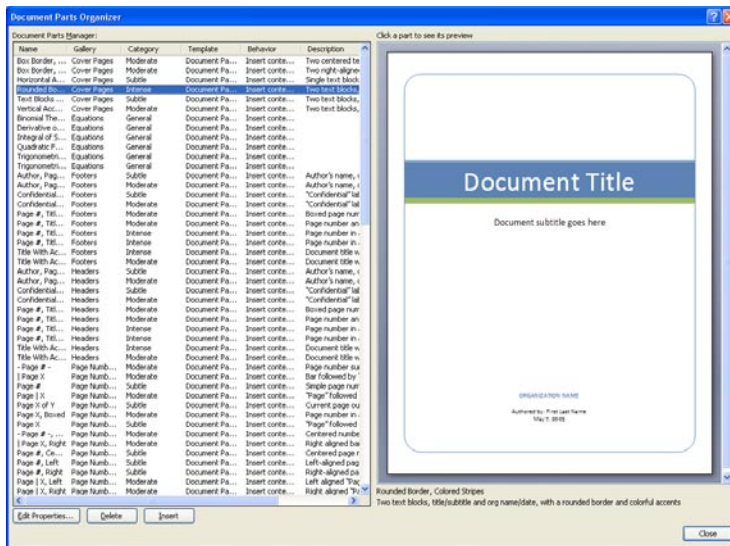
If you're putting together a template for a specific kind of document, say a financial report, you can save building blocks into that template. This way, when people create documents based on this template, in this case financial reports, they will see cover pages, headers, footers, etc. tailored to the specific kind of document. The parts that come from the template of the document you're editing will always sort to the top of the list, as they are assumed to be the most relevant.

You can create custom building blocks and store them in any of the galleries. For example, Cover Pages let you save any selection as a cover page by using the command at the bottom of the gallery. You can also use the ALT+F3 shortcut to trigger the creating of a building block. You will then specify the name, description, gallery and category, which control how the content is presented in the user interface. The gallery is selected automatically for you when you trigger the process from an existing gallery.

You can also choose what template to store the content in, of course. Word will always give you a list of all templates that are currently loaded. Usually Word selects the shipped Building blocks.dotx as the place to store the parts by default because this is where all built-in parts are located. If you're editing a specific template, creating a new building block will select the current template to store it.

Organizing Your Building blocks

Word has a Building blocks organizer that can be accessed from the Quick Parts menu on the Insert Tab. This dialog allows you to preview all the building blocks available to the current document so you can rename them, change their descriptions, move them from template to template, etc.



You can use the Building blocks Organizer to change the properties of a part and the template where it is stored.

Creating Structured document templates using building blocks and content controls

With Office Word 2007, solutions can be built to aid in making the assembly of documents much easier. Instead of the copy/paste difficulties people live with today, Word documents can integrate data from external sources, and even help document authors add the right type of content to the documents they create. Developers can create sophisticated solutions based on the XML integration capabilities of Word, which can exhibit different behaviors:

- Using the new content controls, specific areas of content within a template can be “bound” or linked to an external data source, such as a records database, to automatically incorporate information into documents
- The format of specific types of content can be enforced, such as requiring a specific date format, or forcing a selection of items from a pre-built list, rather than having people manually type entries
- Content controls help you prevent users from editing, deleting or re-styling specific content within a document.

Custom building blocks can easily be created for court-specific cover pages that include the necessary section breaks, footer information and placeholders for the document’s Table of Contents and Table of Authorities. These custom building blocks will allow for more accurate and consistent formatting of court documents.

Create custom templates for the firm’s letters that are linked to external data to insert author-specific or firm-specific information such as direct dial numbers, email addresses or office locations. Information is updated at the global level to ensure accuracy of the firm’s letterhead.

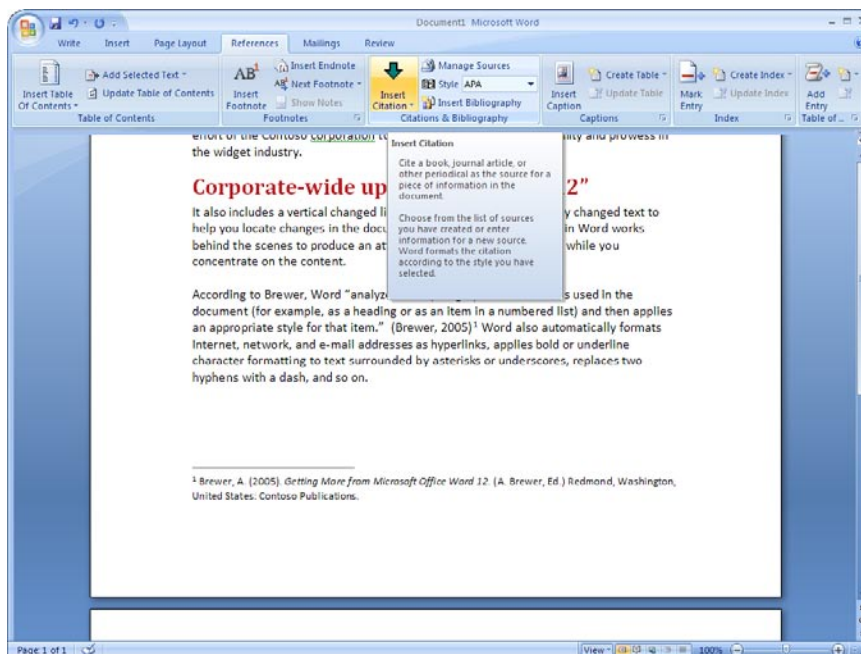
Quick Styles

Quick Styles are sets of styles created to work together. Create Quick Style sets that contain all of the styles that you need to build a document. For a firm’s marketing department, Quick Styles can be used to create great looking publications and attorney biographies.

Quick Styles can also provide easy formatting of standard firm documents such as letters and memos and legal documents such as pleadings and agreements. By using Quick Style sets, you can select the “look” for a letter or agreement based on the author’s preferences. By applying a Quick Style set to a document, all the styles used in the document are updated all at once.

Citations and References

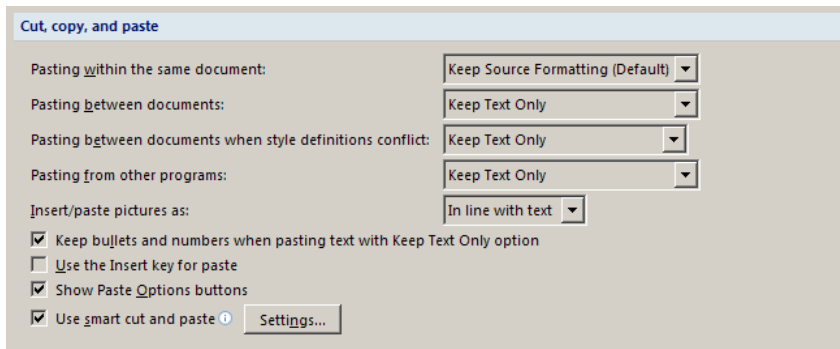
Depending on your industry or target audience, how you manage citations and references can vary widely. The Word Reference Builder helps you manage and format the references in your document automatically. After identifying the references used in your documents, you can then use the Word Reference Builder to automatically reformat bibliographies and citations according to one of many commonly used style guides, including Associated Press (AP), Modern Language Association (MLA), Chicago Manual of Style, International Formats, and American Medical Association (AMA). All you have to do is select the style you need; Office Word 2007 then formats citations automatically. You no longer have to guess whether you are using citations properly, or waste time fussing with the correct format.



Inserting a citation into an Office Word 2007 document

Paste Options

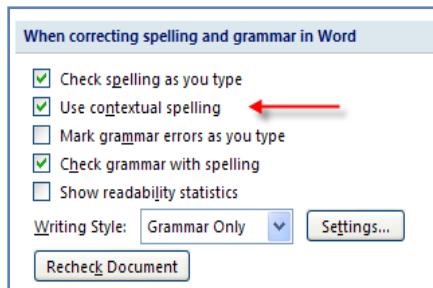
It is very common to recycle information from old documents; people frequently do this by using the well-worn path of copy and paste. Unfortunately, these old documents very often have different styles, and the copy-and-paste method can lead to style problems. To help ease the frustration of style mismatches and other unexpected copy and paste behaviors, Office Word 2007 has included new functionality to help you define how the copy and paste feature will behave, ensuring greater predictability and easier formatting when reusing content.



New options allow you to specify whether you want to keep formatting from the original document, match the new location, or only paste the text.

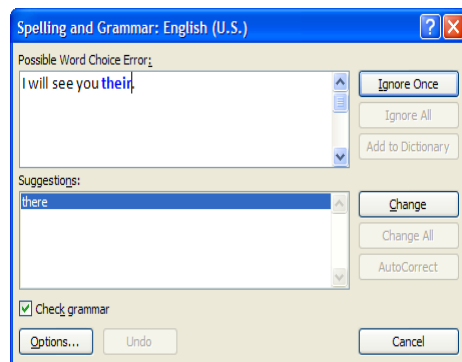
Contextual Spelling

Word 2007 has improved the spelling checker results by using contextual spelling.



Display proofing options to view and change the Use contextual spelling option.

If you have ever typed a mistake such as "I will see you their", contextual spelling will help with finding and fixing these types of common mistakes.



Contextual spelling mistakes display in blue and can be easily fixed in the Spelling and Grammar dialog box.

Bulleted and numbering enhancements in Office Word 2007

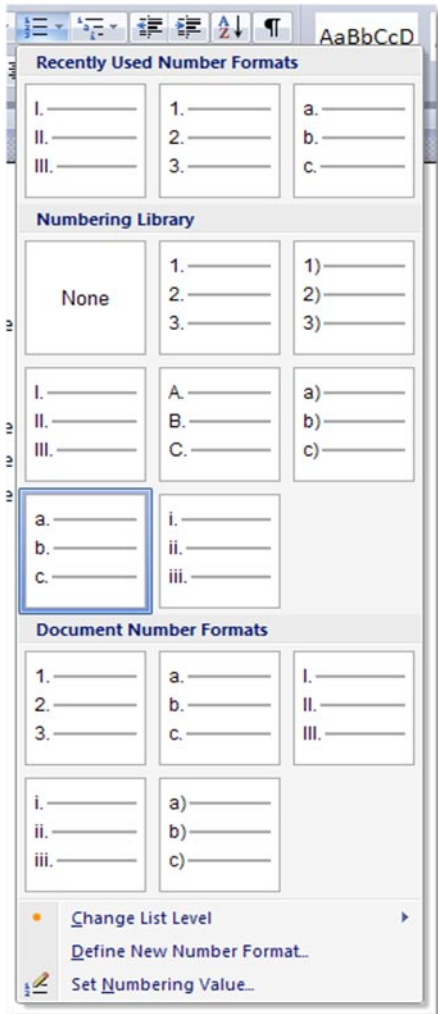
Office Word 2007 improves the predictability of number recognition and the ways in which lists are managed, making the often frustrating experience of creating bulleted lists and numbered lists easier.

Bullets and Number Galleries

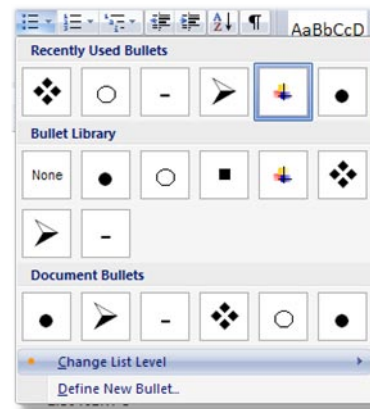
Like many other features of Office Word 2007, new galleries have been introduced to offer authors improved control of numbered lists, bullets and outlined lists.

These galleries offer a visual preview of the list before they apply it to the document. A “live” preview is also applied to the document text, to demonstrate the new list format before it is actually applied.

Using the list galleries, you can create your own bullet, number and outline list styles, and apply them to documents with a single click.



The Numbering Gallery allows you to instantly apply a numbering scheme to your numbered lists



The Bullet Gallery allows you to apply a specific bullet within the list, change the list level of an entry, or to create custom bullets

In prior versions of Word, when formatting bulleted and numbered lists, many times selecting one of the entries would not only change the bullet or number but also the overall formatting of the paragraph.

Many users expressed a desire to separate the numbered, bulleted and outline list formatting from the text formatting attributes. Prior releases of Word offered no way to create a library of the number formats or bullet styles preferred by an individual user.

In Office Word 2007, galleries of bulleted, numbered and outlined lists can be updated with user-defined styles, enabling them to create libraries of their own preferred list styles. When a new format is selected from either of these galleries, no other paragraph properties are updated—only the number format or the look of the bullet should change.

When you create a new number format or bullet, a new entry is added to the library. An entry can be removed from the library by right-clicking on it and selecting Remove. Each user can define up to 255 formats for their own use.

Behavior Changes in bulleted and numbered lists

Based on the feedback of experienced Word users, several minor changes were made to improve the experience of working with lists within documents.

Backspace removes the number without changing position

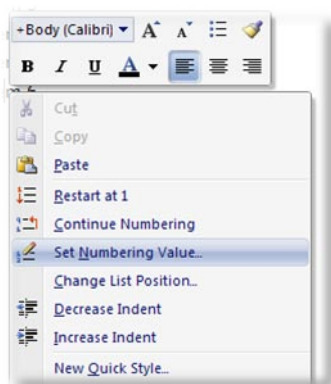
In a numbered or bulleted list, pressing backspace first removes the number without changing the position of the text. Pressing backspace a second time moves the text to align under the number or bullet. Pressing backspace a third time returns the text position to the left margin.

Lists are based on “Normal Indent” Style

Whenever a number or bullet is applied to a paragraph based on the Normal style, the style is updated to the List Paragraph style. This allows for controlling the formatting of the spacing within lists separately from the spacing between paragraphs—a common request of designs and document layout professionals.

Numbered list use the indent for alignment

Previous versions of Word have inserted a tab stop marker over the left indent to aid in aligning numbers. However, this made it much more difficult to adjust the position of the text. Furthermore, numbered (and bulleted) lists ignored the left indent rather than treating it as a tab stop thus behaving differently than unnumbered paragraphs. Legacy documents will continue to exhibit this behavior but Office Word 2007 documents will treat the tabs on numbered, bulleted, and unnumbered lists the same way, allowing more consistent formatting and style definition.



Setting the Numbering Value

Restarting and continuing lists can be confusing and difficult to manage. A single dialog box now provides control over all of this related functionality. In addition, a new feature is added that allows skipping values in a list, including in multi-level lists where it sometimes desired to skip from a number such as 1.4 directly to 2.1 with no paragraph showing numbered as 2



In addition to the ability to “restart” or “continue” numbering in lists, Office Word 2007 also allows you to reset the current numbering value to any number you choose.

Managing Multi-Level Lists

A new Outline Numbering Gallery has been added in Office Word 2007 to provide more direct access to control over multi-level lists. When the gallery is displayed, all levels of the current list are highlighted. Selecting an entry from this gallery will then change all of those paragraphs.

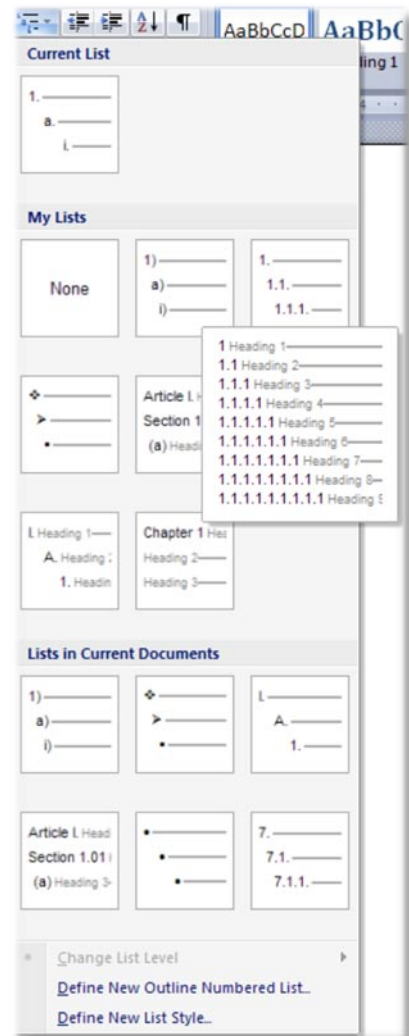
The gallery combines both Outline Heading numbering and List Style numbering entries but provides separate entry points for their definitions. The advantage of List Styles (introduced in Microsoft Word 2002) is that they can be named.

The Outline Numbered List Gallery allows you to instantly reformat an entire outline by selecting from a pre-defined (and customizable) gallery

Changing Level

In addition to the shortcuts (the Tab and Indent and Decrease Indent buttons, each a control for changing the level of the selected entry), the Outline Numbering Gallery is particularly useful when adjustments have been made to the alignment within a list and the goal is to bring everything back to the same structure. It is also useful when managing complex numbering schemes such as technical number (1, 1.1., 1.1.1, and so on) to ensure that the entry is at the proper level.

The Outline Numbering Gallery allows you to instantly reformat an entire outline by selecting from a pre-defined (and customizable) gallery



Document collaboration

Tracking changes in a single document

When you want to keep track of changes to a single document as you type, the appropriate feature to use is Track Changes. In previous versions of Word, you could mark text as deleted and inserted. Office Word 2007 now includes move tracking: If you copy text from one location and paste it to another, it is tracked as a move and not as a deletion and insertion.

Comparing versions of a document

If you have two different versions of a document and want to know what changed, but aren't interested in who made the changes, then you can use the document Compare to see the differences between two versions of the document. Office Word 2007 includes significant improvements to the document compare user experience. The added ability to compare tables will provide better collaboration between co-counsel or opposing counsel when Exhibit lists and structured settlements are in table format

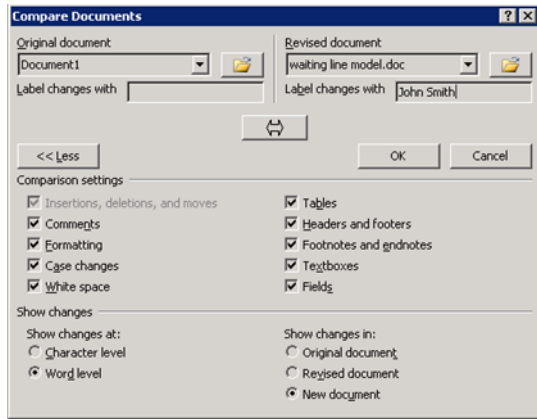
In earlier versions of Word, the process for starting a Compare required having one of the documents open and browsing to the other using the File Open dialog, and then select an option from the split drop-down. Often, users who worked with a document management system would not have the compare options available. Also, it was confusing as to which document would be considered the "original" and which would be considered the "revised."

Office Word 2007 allows you to start the process without any documents open, browse for documents, and specify which document is the original and which is the revised. This straightforward interface is used for both the document comparison and combination functionality.

Compare options

Office Word 2007 offers the option to change the name that will be attributed to the revisions. This can be used when the comparison is being run by a secretary but you want the revisions to be attributed to the attorney, for example, or if you want the changes to be attributed to the law firm itself. For example, you may not want to see all of the formatting (e.g. bold, italic, etc.) changes, so you can now choose to ignore the following things when comparing:

- Comments
- Formatting
- Case changes (e.g. "the" versus "The")
- White space
- Tables
- Headers and footers, footnotes and endnotes
- Text boxes
- Fields

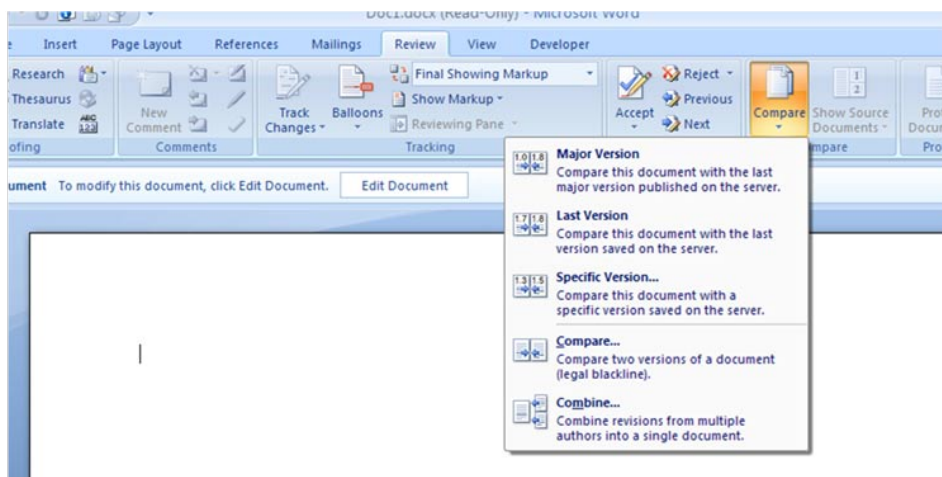


Compare Options dialog box

If you chose to ignore an option, then the Compared document will show what is in the Original document. Office Word also allows you to specify if you want the changes to be marked at the character level (cats) or the word level (cats) and if you want them to appear in a new document or to be folded into one of the source documents.

All of the settings in this dialog are “sticky”: Word will remember which options you selected, and those same options will be selected by default the next time you start a Compare.

Microsoft® Office SharePoint® Server 2007 and Windows SharePoint Services versioning capability can also be used with the document comparison feature of Office Word 2007. Word will display additional options for documents that are opened against a server that contain versions. Those options allow you to directly compare against the previous version, the last major version, or to specify which version to compare against. When one of the server comparison options is selected, Word will automatically open the server documents for you and then the compare is done using the same new improved compare User Interface.



Comparing versions stored in Windows SharePoint Services libraries is simple when using Word 2007

Table comparison

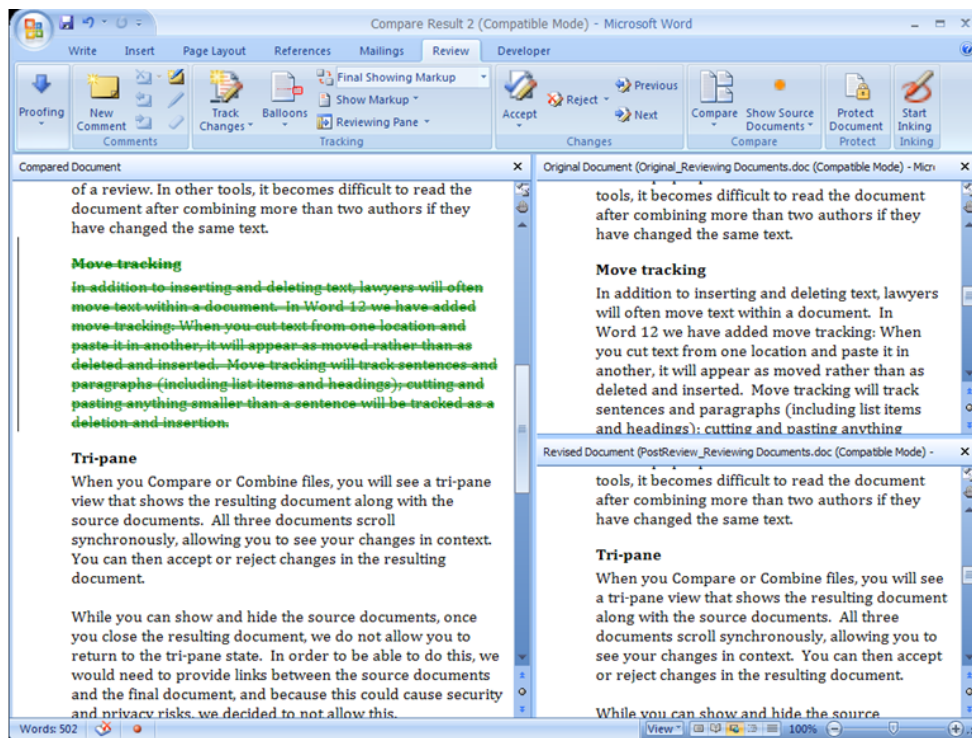
Office Word 2007 adds the ability compare tables to identify differences. Inserted, deleted, split, and merged cells, rows, and columns are now tracked, as well as inserted, deleted, and moved text within a table.

	2003	2004	2005
Milk	1 gallon	2 gallons	2.5 gallons
Eggs	1 dozen	2 dozen	3 dozen
Butter	1 pound	2 pounds	1.5 pounds

Compared table showing inserted column

Tri-pane review panel

When you Compare or Combine files, you will see a tri-pane view that shows the resulting document along with the source documents, the reviewing pane can also be used to show comments in a simple summary view. All views scroll synchronously, allowing you to see your changes in context. You can then accept or reject changes in the resulting document.



The new Tri-pane review panel of Office Word 2007

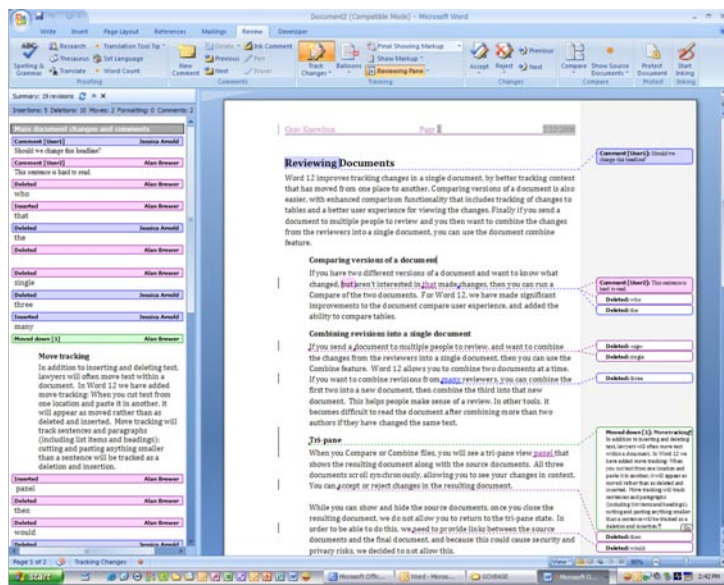
Combining revisions into a single document

If you want to combine the changes from the reviewers into a single document, then you can use the Combine feature. You may find that it becomes difficult to read the document after combining more than two authors if they have changed the same text. To help simplify the process, Office Word 2007

allows you to combine two documents at a time. This allows you to merge changes into their documents in a manageable fashion, helping you reconcile comment collisions and conflicting feedback.

Like the document comparison feature, combining revisions from two versions of a document takes advantage of the new tri-pane review panel. This enables you to see both the original and revised document, along with a new, composite document that represents a combined version of the two.

You can operate the document comparison and combining features without having three versions of a document open; the preference is entirely up to you. A new, composite document does not have to be created to represent the merged documents. The original or the revised document can be used as a home for the combined feedback from multiple reviewers.

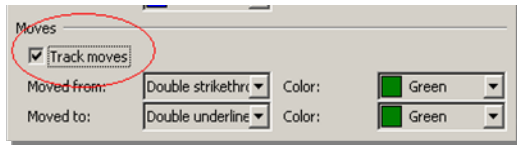


When combining documents, you can view a single document and merge the changes from two reviewers.

Tracking moved text

Office Word 2007 now includes move tracking: When you cut text from one location and paste it in another, it will appear as moved rather than as deleted and inserted. Move tracking will track sentences and paragraphs (including list items and headings); cutting and pasting anything smaller than a sentence will be tracked as a deletion and insertion.

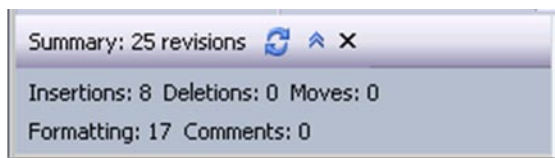
When you turn on track changes, move tracking is enabled by default. If you do not see text as moved, then either move tracking has been disabled, or you have moved text that is smaller than a sentence. To see if move tracking is enabled, go to the Review tab, and in the drop-down below the Track Changes icon, click Change Tracking Options and check to see if the Track Moves option is checked in the dialog box. By default, moves appear as green text, but you can use the options in this dialog to change the color.



The Track Moves options in the Track Changes Options dialog box

Reviewing pane

The reviewing pane now defaults to a vertical mode, conserving screen real estate and allowing you to use it as a form of navigation. It also has a summary of the revisions contained in the document. This summary can be collapsed to show only the total number of revisions in the document, or expanded to show a breakdown of the types of revisions.



Revision summary

To show, hide, or move the reviewing pane

The reviewing pane is controlled by a split button on the Reviewing ribbon. Clicking the icon turns the pane on or off; selecting one of the options in the drop-down determines the position of the reviewing pane.



Reviewing pane options

Finishing documents

When collecting feedback from many people, or when sharing a document with others, it is important to protect those internal comments from escaping when the document is published. Additionally, sharing that information with other users of Office must be made easy; nobody should have to worry about whether or not they can open the file, or that it will print incorrectly. Office Word 2007 includes many new tools to complete document reviews, and to ensure that when you publish your documents, you can do so with confidence; knowing no comments are included within them, and knowing that another person cannot inadvertently change your document.

Sharing Documents with Others

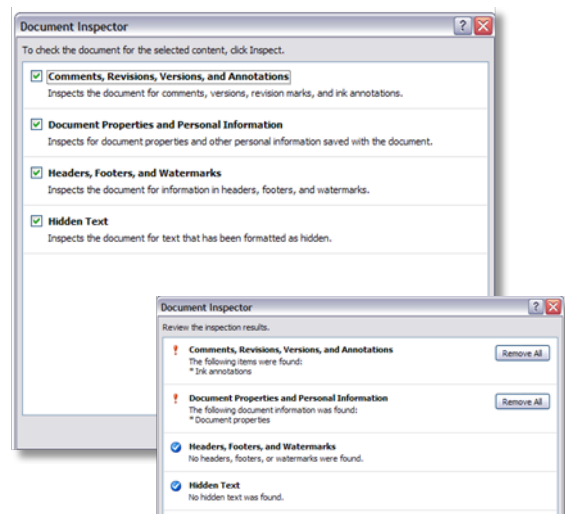
Word allows you to easily and safely share your documents with others. You can easily remove all personal information from your documents using the Document Inspector, which scans for hidden text and document properties among other content potentially inappropriate for sharing. When you are done editing your document you can mark it as final, which puts it in a state that makes it easier for your audience to read it. Finally, with Information Rights Management you can restrict the way others see and use your documents, placing limits on copying, editing, etc.

Document Inspector

Many times it is important to examine documents to identify sensitive information prior to publishing. In order to protect sensitive comments or metadata, it is important to scan a document to detect information which may be hidden within the document only to cause problems later. Office Word 2007 includes a new Document Inspector feature to help detect and remove information from documents. The document inspector can detect and remove the following types of information:

- Comments, Revisions, Versions and Annotations
- Document Properties and Personal Information
- Headers, Footers and Watermarks
- Hidden Text

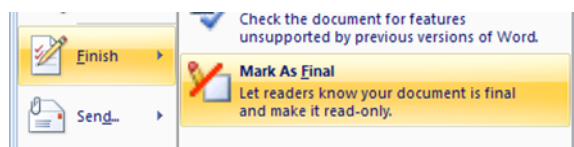
By using the document inspector, you can detect and remove any information in the document that you may not want published in the final material. The document inspector is extensible as well, to enable custom solutions to identify and remove items specific to your environment.



The Document Inspector feature of Word 2007

Marking a document as “Final”

After removing comments and other unwanted information from the document to be published, you may want to take additional steps to finalize



The Mark as Final option of Word 2007

content. For example, many people do not like to see grammar and spell-checking issues when reading documents; for consumers of content, the information related to the editing of a document may not be necessary. Office Word 2007 helps you prepare documents for publishing in this way; now you can share your documents confidently, knowing the consumers will experience a document exactly the way you intended.

A new “Mark as Final” feature has been added to Office Word 2007. By marking a document as final, you can prevent inadvertent changes to the content when it is read by a different user. For example, once a pleading is signed/filed, mark it as “final” to prevent changes from accidentally being made by people who wish to reuse the document. Mark as final also removes editing artifacts from a document, such as grammar checking or spell checking. This is a simple, easy protection to add to a document, and it is reversible. If you need to return to the document for editing, you can disable the feature to restart grammar checking, spell checking and other editing operations. “Mark as Final” is a great tool to use for documents that are electronically filed with the courts.

Adding Digital Signatures to your documents

Organizations may wish to further protect their documents from being changed by adding a digital signature. People may wish to effectively “Rubber stamp” a document without changing its contents, where, for example, where a financial manager needs to complete a review of an Word document, but doesn’t want to change the contents.

If a company wants to reduce the amount of paper used in their contract signing process, Contract authors create one or more “signature lines” inside their contract where users will sign. Before sending the document out, it is finalized to prevent changes or tampering, then the contract is sent to a set of recipients. When a recipient opens the document, they discover their signature line, sign the document, and return it to the sender. The sender collects all of the signatures and the contract is complete

Several different types of signatures are included within Office Word 2007 to help solve these types of scenarios:

- **Mark as Read-only Signature** – a signature that is created for the purposed of marking a document as read-only and protecting its authenticity and integrity. Only one of these can be added to a document.
- **Signature Line / In Document Signature** – a signature that is visible in the document’s content. Users create unsigned signature lines that they can then transmit to recipients to sign. A recipient opens the document, finds their signature line, then signs the document.
- **Digital Signature** – a signature that is created and stored in the document, but not visible in the document’s content. Users can use the signature pane or external tools to view & validate these signatures.

Sharing documents using PDF and XPS fixed formats

Documents created within Office programs act as a platform to collaborate, manipulate and share document data, create consistently good-looking results, and cycle documents through their own internal workflows and processes from initial creation through to finalization. To support user-centered document management scenarios and in response to top customer requests across the Office system of

products, you can now use Office to create an accurate electronic paper representation of their original document to share with others for viewing online or printing, archive individually, or print commercially.

With the addition of a free, stand-alone add-in from Office Online, the 2007 Office system provides users with the ability to produce electronic paper documents—PDF (*.pdf) and XPS Document (*.xps) files—directly from within Office applications Word, Microsoft® Office Excel, Microsoft® Office PowerPoint, Microsoft® Office Access, Microsoft® Office Visio, Microsoft® Office Publisher, Microsoft® Office OneNote, and Microsoft® Office InfoPath®.

For the legal community, the PDF and XPS plug-in for the 2007 Office system will enable powerful PDF and XPS functionality:

- PDF/A-compliant PDF documents, to comply with the recent archival standard¹
- “Interactive” features, including hyperlinks, bookmarks, cross-document links
- Accessible, searchable PDF documents
- Compatibility with Adobe Reader 6.x and Adobe Reader 7.x and other PDF viewing applications

¹ PDF/A compliance is for PDF files only, and does not apply to XPS documents.

Managing Content with Office SharePoint Server 2007 and Exchange Server 2007

Companies are increasingly challenged with compliance regulations. Although many have started using electronic business and document management processes, it can be difficult to start managing and auditing electronic business records.

When a document has been completed and is ready to be shared, you need to be confident that it is not inadvertently shared with people who should not see it. You should also be confident that your documents do not include unintentional content or editing marks that call out words that the recipient's dictionary does not recognize. Furthermore, you should be able to restrict access to the content within your documents; they may include potentially sensitive information that may come to light after they have been publicly distributed. Finally, you may also need to indicate that your presentation is the document of record that indicates an official company policy or procedure for a given topic.

Using Office Word 2007 with Office SharePoint Server 2007 and Microsoft Windows Rights Management Services, users have many more ways to protect and manage their information.

Information Rights Management

You may need to protect and control access of company information, especially if you are creating documents with confidential information. By using the Microsoft Office system with Windows Rights Management Services for Microsoft Windows Server™ 2003, you can assign permissions that prevent others from copying, printing, or editing your presentation.

Records Management

Office SharePoint Server 2007 provides a managed document repository built on Windows SharePoint Services to store the document record, or the master document, in a Records Repository. You can upload documents to this repository directly from Office Word 2007. This ability provides a way for people to publish documents without having to resort to an external tool or Web browser interface.

Information Management Policies

When using Office SharePoint Server 2007, you can apply information management policies that consistently enforce the labeling, auditing, and expiration of documents. You can configure policies for a specific storage location or content type. For example, organizations can help ensure that all documents are stored the same way by setting the expiration dates on common criteria, such as the end of the fiscal year.

Office SharePoint Server 2007 supports a set of information management policies that can be defined for an entire site or a specific list, library, or content type. You can also create a policy statement informing users how the content is governed. For Word documents, this policy statement is embedded in the document. For instance, the policy statement might indicate that a document will expire after a certain period of time or that it is sensitive information that should not be communicated outside the company. It can even provide a contact name if the recipient needs more information.

Keeping Your Content Safer with Office SharePoint Server 2007

It can be extremely challenging to implement consistent information management policies across an organization that has a wide range of sites. To solve this issue, Office SharePoint Server 2007 helps policy decision-makers—such as IT staff, records managers, or compliance officers—to define site policies that users can apply without worrying about the specific details. Each site policy can include any number of settings, like labeling expiration or auditing. As a result, you can add an extra layer of security to your documents by designating access to them. For example, if you only want to give a certain department access to presentations, you can easily define it to require the correct credentials.

Improving compliance with Exchange Server 2007

Microsoft Exchange Server 2007 is a secure, reliable enterprise-class messaging server with built-in compliance capabilities that delivers an integrated, cost-effective and manageable e-mail compliance solution. Addressing the e-mail compliance needs of organizations in financial services, healthcare, and other regulated industries, the built-in capabilities of Exchange Server 2007 help simplify compliance with company policies and regulatory controls by allowing organizations to filter, examine, change, journal and archive any message in their system.

For instance, Exchange Server 2007 enables compliance officers and e-mail administrators to address the message retention, controlled access, and process and data integrity challenges of compliance by:

- Establishing automatic retention to enforce archival and deletion policies
- Creating mail flow rules for enforcing encryption and routing policies
- Streamlining message audit processes with new tools and cross-mailbox search

Word 2007 for solution development

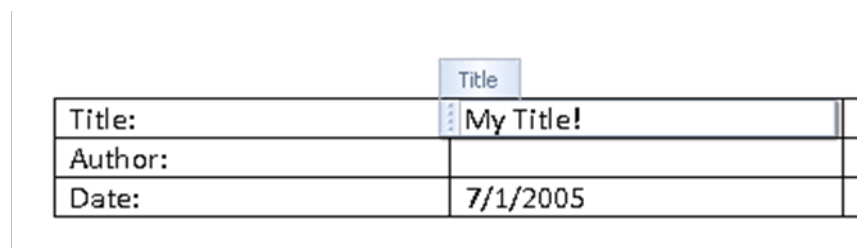
Using new solution development tools in Office Word 2007, you can mark up a Word document with a custom-defined structure. This structure can be used to define semantics (e.g. this paragraph isn't just the first paragraph, it's actually the 'title') and business logic (e.g. when the 'author' changes, also change the 'team') for a document, as well as process these documents & their contents without automating Word.

Creating Structured Document Templates

The first major theme of solution development in Word 2007 is enabling solution creators to build structured Word document templates. With Office Word 2007, Content controls allow the creation of structured Word documents directly from the user interface, with support for granular restrictions and behaviors.

A common goal of a structured Word template is defining regions of content as something other than just their presentation (e.g. instead of the 1st table, 3rd row, 1st column, this is the 'invoice date'). Previously, you could do this with bookmarks (which had limited user interface and object model support), or with customer-defined XML (which required a pre-defined XML schema, etc.).

Content Controls give you the ability to tag the areas where content is added to the template. Content controls are essentially "tags" help developers access that content programmatically (or externally to Word via the XML file format) using the semantics that you define, rather than having to parse layout and formatting information. This makes it much easier for template creators to label their document contents consistently, and makes it much easier to re-use content in the future.



	Title	
Title:	My Title!	
Author:		
Date:	7/1/2005	

Sample of a content control

Content Restrictions

In Office Word 2007, seven different types of Content controls can be inserted, each of which provides a unique set of restrictions on its contents. For developers of templates, it will be easier to create solutions that provide the kinds of editing restrictions that Word solutions typically require – in simple terms, make it easy to control the interaction that a user has with the template, to ensure they add the right content.

- **Rich Text:** The simplest type of building block, with no restrictions on its contents
- **Plain Text:** This type of building block can only contain text (no tables, images, etc.) with a single type of formatting
- **Drop-down List:** This type of building block provides a familiar drop-down list, but only when the user is interacting with the contents by hovering/clicking.
- **Combo Box:** Same as a drop-down list, but can be edited directly inline as well.

- **Document Part:** Analogous to a rich-text combo box, this type of building block interacts with Word's new document parts functionality to provide a drop-down list selection of document parts in a custom user-defined category. See the document parts section for more information on this feature.
- **Date Picker:** This type of building block provides an inline calendar picker which the user can use to easily select a date.
- **Picture:** This type of building block restricts its contents to a single image.

Document Information Panel

A new Document Information Panel has been added to Word 2007 to enable structured metadata collection and validation. The Document Information Panel is a replacement for the document information dialog boxes presented in Office 2003 and earlier versions of Word and other Office applications. Using the Document Information Panel, people can address metadata management and document management in three important ways:

- You can use the standard Word document properties, including Author, Document Title, Subject, Keywords and other properties in the same manner that they do today.
- A Document information panel can display and collect important metadata defined by within Windows SharePoint Services library. In this way, Word, Excel or PowerPoint documents can link and store metadata directly within the SharePoint environment directly from the client applications.
- A custom Document Information Panel can be used to collect and store information defined by your organization. You can establish your own document metadata requirements, and include a custom Document Information Panel within a Word document. The custom Document Information Panel contains the rich capability of an InfoPath form, including external data connections, data validation, conditional formatting, business logic and other controls. This enables organizations to deploy document templates with advanced document management capability built directly into a document, in a way that is easy and straightforward for document authors to participate and understand.

Because the metadata for Word documents is stored as a separate XML part within the Word XML format, it is easily accessible to developers and solution providers. Not only does this enable powerful scenarios within documents, but external databases and content management tools can utilize this metadata to extend the capabilities of their products and solutions.

Office Open XML Formats

Office Word 2007 (along with Office Excel 2007 and Office PowerPoint 2007) include support for new file formats that help reduce file sizes, improve the recovery of lost or corrupt data, and improve the ability of developers to create the types of solutions discussed in the previous section. The Open XML Formats usher in a new era of transparency and openness for the Microsoft Office system file formats, and help organizations ensure that now and in the future, the contents of their documents will remain accessible to XML-enabled applications.

The future of file format technology

The Open XML Formats are compact, robust file formats that are designed to suit the needs of today's digital work style. Automatic ZIP compression results in file sizes that are 50% smaller than the current binary file formats.² Because of the way data is stored within the file format, the corruption of any individual piece of content, such as a chart or diagram, is much less likely to destroy the entire file, which means that damage files will recover with greater frequency and success than they do today.

New file types within the Open XML Formats clearly designate files that are capable of containing macros. New "Macro-enabled" versions of the Open XML Formats are available, and have different file format extensions. This is to enable IT organizations to simply look at the extension of a file (.docx, .docm, etc.) to know whether or not it contains a macro. This is a very important step forward in helping ensure the safety of documents in your organization.

Open file format with a royalty-free license

The Open XML Formats utilize extensible Markup Language (XML). XML-based file formats help ensure broad integration capability for all software developers. Because the Open XML Formats are offered under a royalty-free license, developers are free to use the Open XML Formats for their solutions, without financial consideration to Microsoft. Documents can be opened and edited by any application or system now or in the future, to ensure that document archives aren't tied to a specific version or product. The Open XML Formats have been submitted to Ecma International for standardization, to ensure that the SAME Open XML Formats are supported in many versions of Microsoft applications, as well as other non-Microsoft solutions.

New opportunities for solution developers

The Open XML Formats offer many new development opportunities. Document solutions can dynamically update documents with the latest information to ensure everyone is working from current data. Organizations can now create document solutions that integrate multiple information sources into a unified view to improve data integrity and compliance.

Compatible with prior releases of the Microsoft Office system

Open XML Formats are designed to be compatible with earlier releases of Microsoft Office and to be integrated easily with other applications and systems. In order to ensure the Open XML Formats become an important part of all Office users' environments, Microsoft has made extensive efforts to enable compatibility for current Office users to ensure they can exchange documents that are created using the

² Actual size reduction will vary per file, 50% size reduction is a preliminary figure identified in early 2007 Office system testing.

Open XML Formats. By downloading a free Compatibility Pack from Microsoft Office Online, you can ensure that the Open XML Formats are fully editable by current releases of the Microsoft Office system.

For More information

To learn more about the 2007 Microsoft Office system, you can visit a wide variety of information resources available from Microsoft.com.

[Microsoft Office Online](http://www.microsoft.com/office) – for all the latest news, updates and tutorials for the 2007 Office system, visit <http://www.microsoft.com/office>

[MSDN](http://www.microsoft.com/msdn) – for developers interested in building solutions on the Microsoft Office platform, visit <http://www.microsoft.com/msdn>.

[TechNet](http://www.microsoft.com/technet) – for IT Professionals interested in deployment, management and integration of the Microsoft Office system, visit <http://www.microsoft.com/technet>.

[Work Essentials](http://www.microsoft.com/office/) – For specific solutions, templates and other materials, visit Work Essentials at <http://www.microsoft.com/office/>.

[OpenXMLDeveloper.org](http://www.openxmldeveloper.org) - For developers seeking information on incorporating the Open XML formats into their solutions, a new, free community has been created to share information about the development of the Open XML Formats. It can be found at <http://www.openxmldeveloper.org>.

[Brian Jones' blog on the Open XML Formats](http://blogs.msdn.com/brian_jones) – for those interested in reading more about the development of the Open XML Formats, visit http://blogs.msdn.com/brian_jones

[Jensen Harris' blog on the new Office user interface](http://blogs.msdn.com/jensenh/) – for those interested in reading about the development of the new Office user interface, visit <http://blogs.msdn.com/jensenh/>

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Are you ready for Office 2007? We Are!

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