

Wednesday, September 10, 2008  
LTA Meeting (Dallas, TX)

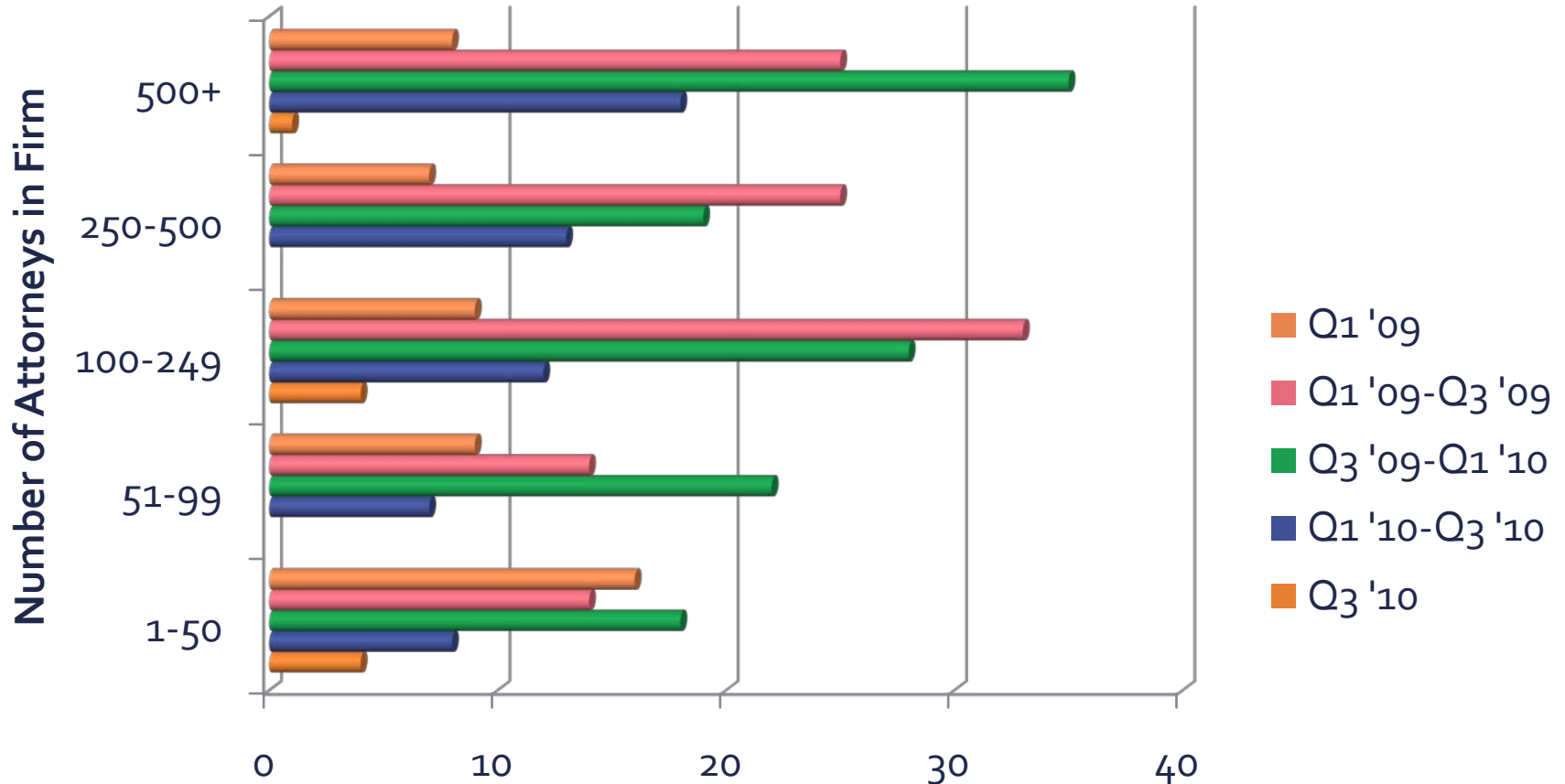
# Styles in Word 2007...

## .... And "In Use" in Legal

# Overview

- Review & What's New
  - Who's migrated and migrating?
  - Digging deep into multilevel lists and list styles
  - What's up with new document defaults?
- Initiatives toward global legal style standards
  - In the UK, In NY
  - What does XML have to do with it?
- Also:
  - ILTA/Microsoft partnered toward adoption
  - Bonus Content...

# Who's Migrated & Migrating

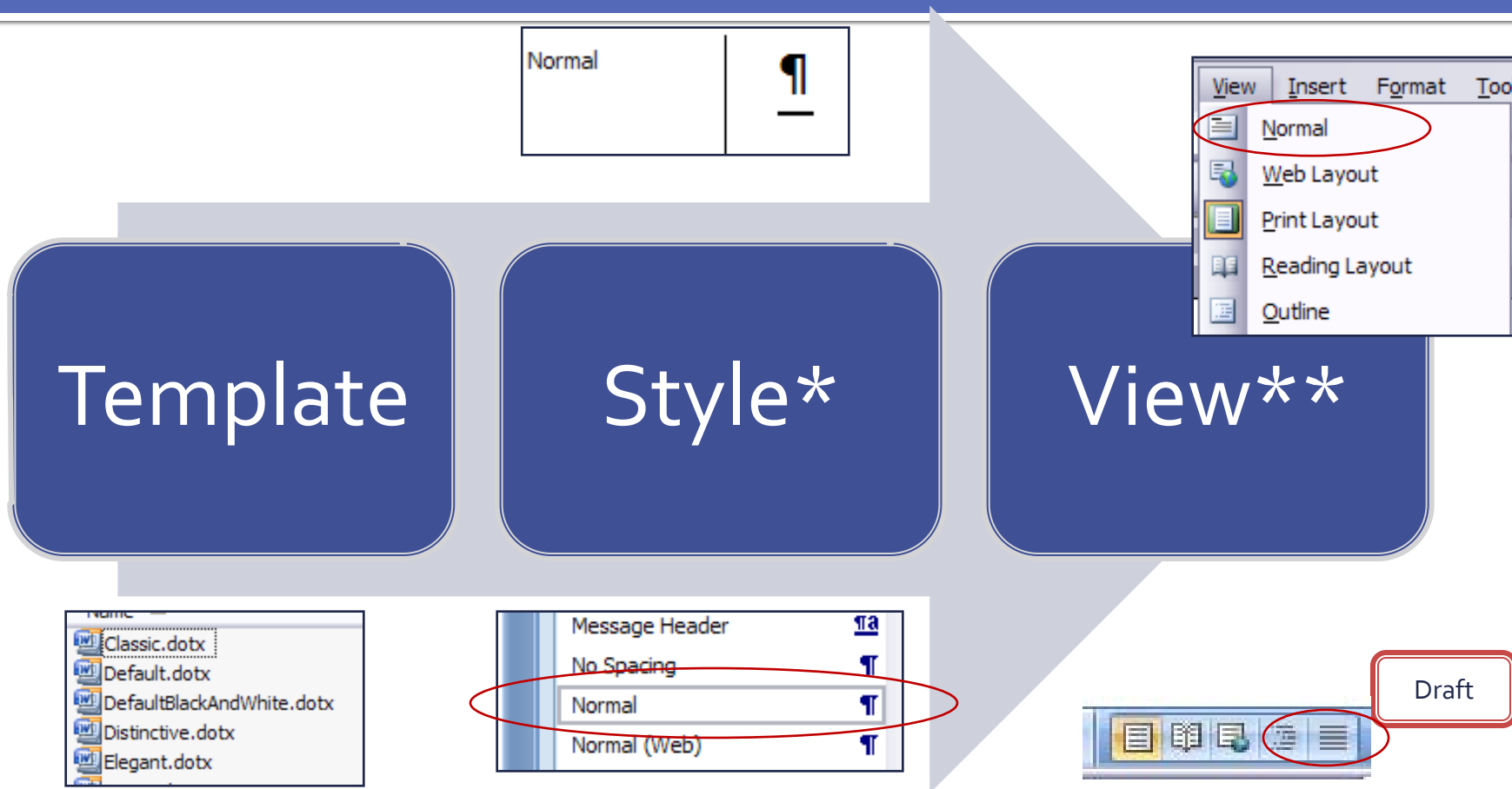


## ILTA Survey Results

423 survey respondents; 14 are deployed

# It Starts with Normal(.dotm)

# Normal Confusion-Abatement in 2007



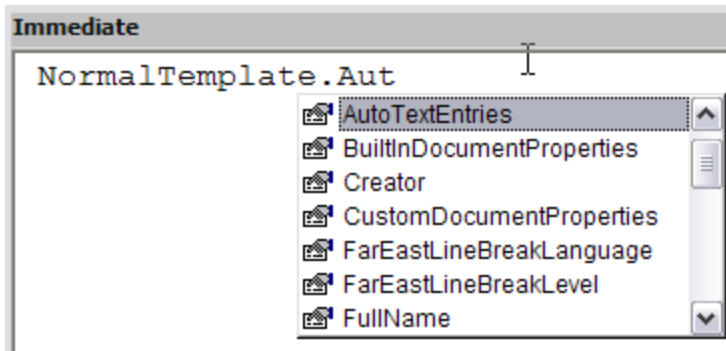
# New to "NormalTemplate" in 2007

- It's not Normal.dot anymore: Normal.dotm

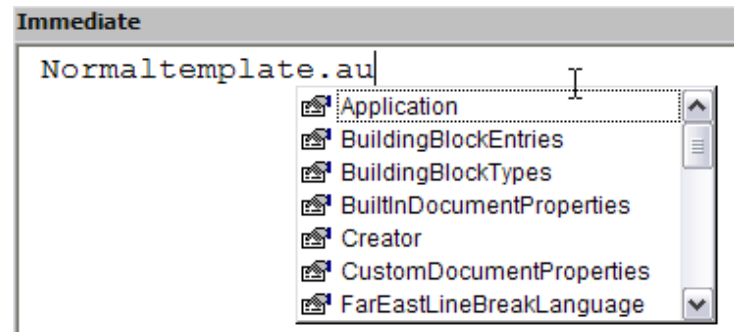
`C:\Documents and Settings\user\Application Data\Microsoft\Templates`

- AutoText changes > Building Blocks

Word 2003



Word 2007



`C:\Program Files\Microsoft Office 2007\Office12\Document Parts\1033`

# Normal.dotm best practices

1. Determine “Who owns Normal?”
  - Do **users** own Normal?
    - If so, build routine *backup* of Normal.dotm
  - Does **IT** own Normal?
    - If so, add routine *deletion, replace* of Normal
2. Plan Normal.dotm migration tasks
  - Migrate formatted AutoCorrect entries
  - Recreate Styles, Keyboard shortcuts (respecting changes in 2007 – see *Resources*)
  - Import any necessary code, validate & test

# Normal.dotm best practices

3. Confirm changes in Normal.dotm *and* related NormalEmail.dotm
4. Manage Building Blocks
  - Move desired AutoText entries into Building Blocks.dotx
  - Ensure any new styles are applied
  - Eliminate any undesired AutoText items from Building Blocks.dotx
  - Eliminate any undesired items from other Galleries in Building Blocks.dotx

# Normal.dotm best practices

5. Plan upgrade education on
  - Keyboard Shortcuts
  - Recording macros
  - AutoText now becomes > Building Blocks
    - AutoComplete tooltip *removed*
    - Now Quick Parts Galleries

# Determine what's in Normal.dotm

Owned by	Body Styles	Bullet Styles	List Styles	Multilevel Styles	Macros	Page Layout	Header/Footer	Document Properties	Keyboard Shortcuts	AutoText	AutoCorrect (formatted)
IT	◆	◆	◆			◆		◆		M*	M*
User	◆	◆	◆		◆	◆		◆	◆	M*	M*

M\*: Move from Normal.dot to BuildBlocks.dotx

If IT owns Normal.dotm: Maintain Multilevel Lists, Macros and Shortcuts *outside* of Normal; Use a Global Template w/Automation

News Flash:

**“Normal isn’t Naughty,  
afterall?”**



microsystems  
THE document experts

# “Set Defaults”

- Remember [**Document Initial Style**]?
- New Style Manager
  - Make Visible
  - “Set Defaults”
  - Overrides “Normal” style attributes
- Net effect:  
Normal’s not a problem anymore...

Not Enough Style?  
Good, there's more!

# Quick Styles

Feature	Quick Styles
Where stored:	In document or template
Applications supported	Word
File formats supported	.docx, docm, .dotx, .dotm .doc, .dot
Compatibility Pack behavior	Preserved during the round-trip
End user interface access	Ribbon to Apply; right-click to create new
Designer interface access	Modify Styles > "Add to Quick Style list" checkbox
Change notes	2007 VBA: new Style property ".QuickStyle = True/False"

# Quick Style Sets

Feature	Quick Style Sets
Where stored	App: C:\Program Files\Microsoft Office\Office12\{(langID)\QuickStyles User: C:\Documents and Settings\{userID}\Application Data\Microsoft\QuickStyles
Applications supported	Word only
File formats supported	.dotx
Compatibility Pack behavior	NA
End user interface access	Ribbon dialog launcher
Designer interface access	File   Open to Modify, File   Save to Save
Change notes	Similar to 97-2003 "Style Gallery"; won't preserve named/linked List Templates; document template is not attached.

# Themes

Feature	Themes
Where stored	Path: C:\Program Files\Microsoft Office\Document Themes 12 File extension: .thmx
Applications supported	Word, PowerPoint, Excel, Outlook
File formats supported	Applied to theme-ready formatting in .docx, .dotx
Compatibility Pack behavior	Theme functionality is lost; visual fidelity maintained
End user interface access	Word: Page Layout   Themes; PowerPoint: Design; Excel: Page Layout   Themes
Designer interface access	Themes   (dialog launcher)   Save Current Theme
Change notes	Fonts: +Headings, +Body; Colors: (theme color palette); Effects: (graphic effects)

# Building Blocks

- Changed: Autotext
  - Removed: AutoText tooltip
  - Now stored: Building Blocks.dotx
- New
  - Added: Galleries and Categories
  - Added: "Options"
    - Insert content only
    - Insert content in its own paragraph
    - Insert content in its own page
- Headers/Footers & Page Numbering

And Last, but not Least...

# Numbering Fundamentals

## Three Elements of “Good Numbering”

Number

- Single list: 1 level
- Bulleted: 1 level
- Outlines: 9 levels

aka: List Template



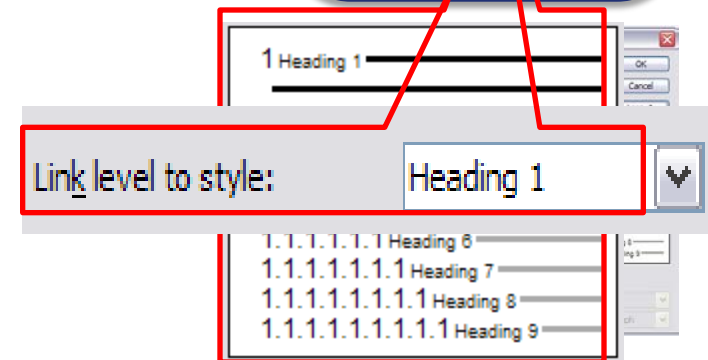
Style

- SL: List Number
- BL: List Bullet
- ON: Heading 1-9

↑ Style



Link





# Numbering Fundamentals

- Quick review of pre-2007's "Seven Laws":
  1. Numbering is a *document* property
  2. Create numbering before anything else
  3. Manipulate, create linked to styles
  4. Modify from Level 1's style using:  
Format | Style | Modify | Format | Numbering | Customize
  5. Each level should "link level to style"
  6. Never Customize an inactive view in List Gallery
  7. Never assume numbering is consistently applied

# The Unlearning Map

## PRE-WORD 2007

- “Outline numbered”
- Modify Level 1 through:  
Format | Style | Modify | Format |  
Numbering | Customize
- Use ¶ Styles, not  list  
Styles (introduced  2002)
- List Gallery ‘floated’

## WORD 2007

- “Multilevel Lists”
- *No access to Multilevel Lists*  
→ *Format | Style*
  - Select #, any level
  - Right-click → Adjust List  
Indents
- Design dilemma:
  - ¶ Styles?
  -  list Styles?
- List Library → interactive

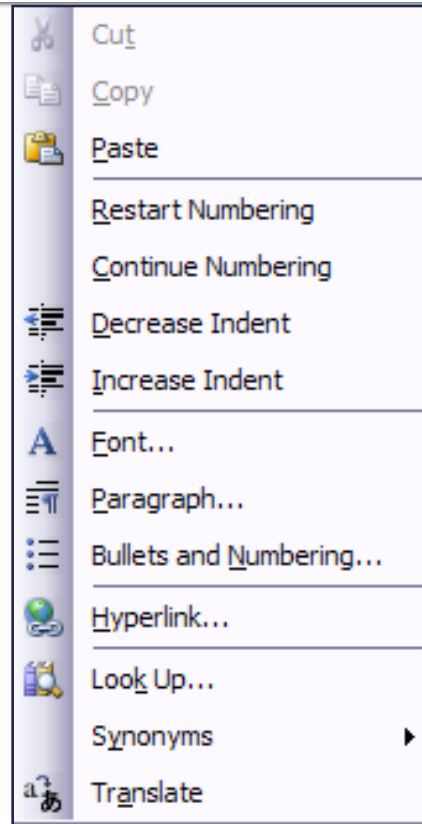
# Access to Numbering



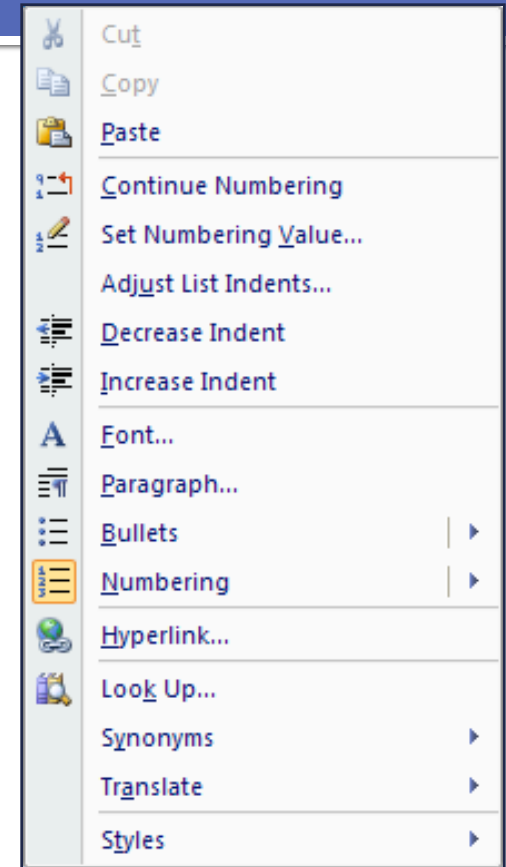
2003 Formatting Toolbar



2007 Home | Paragraph Group

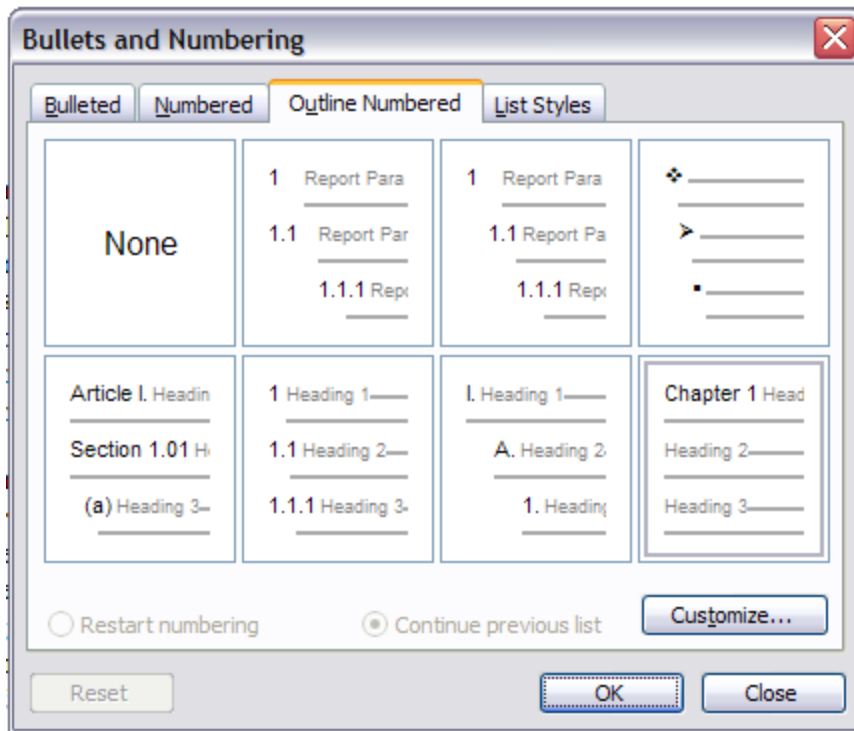


2003 right-click

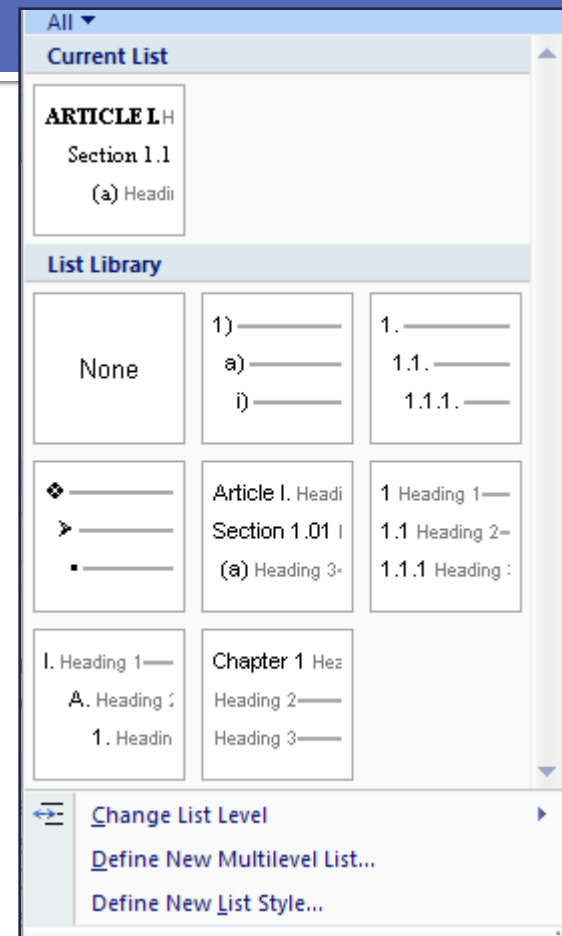


2007 right-click

# “Outline Numbered” > “Multilevel List”



2003 Outline Numbered List Gallery

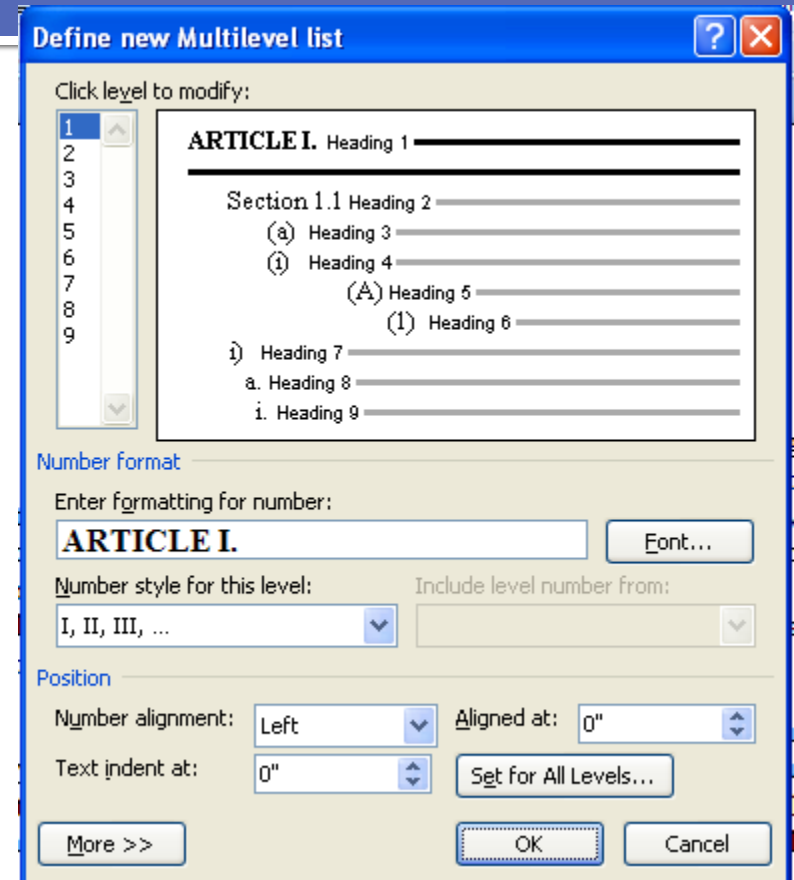


2007 Multilevel List Library

# Customize > Define (Less)

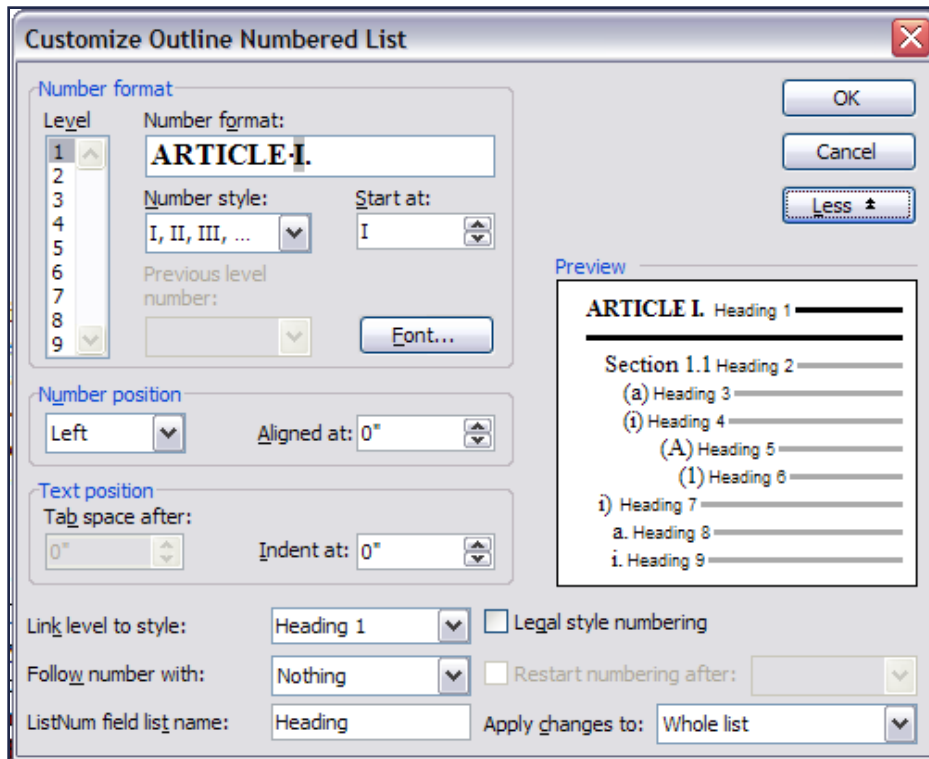


2003 Bullets & Numbering | Customize

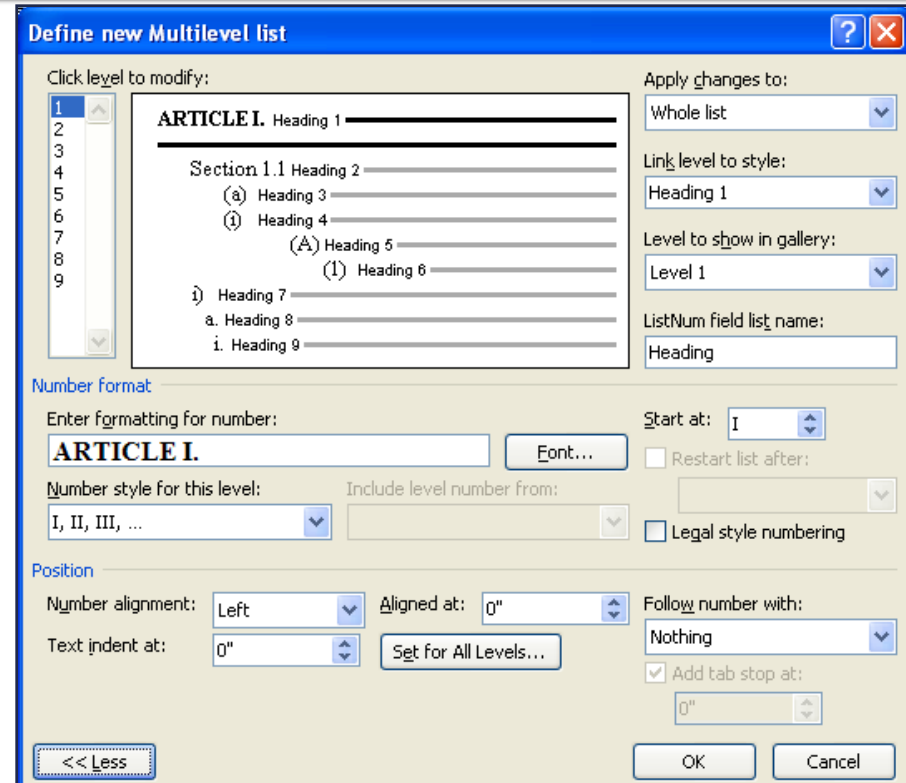


2007 Define New Multilevel List

# Customize > Define (More)



2003 Customize Outline Numbered List



2007 Define Multilevel List

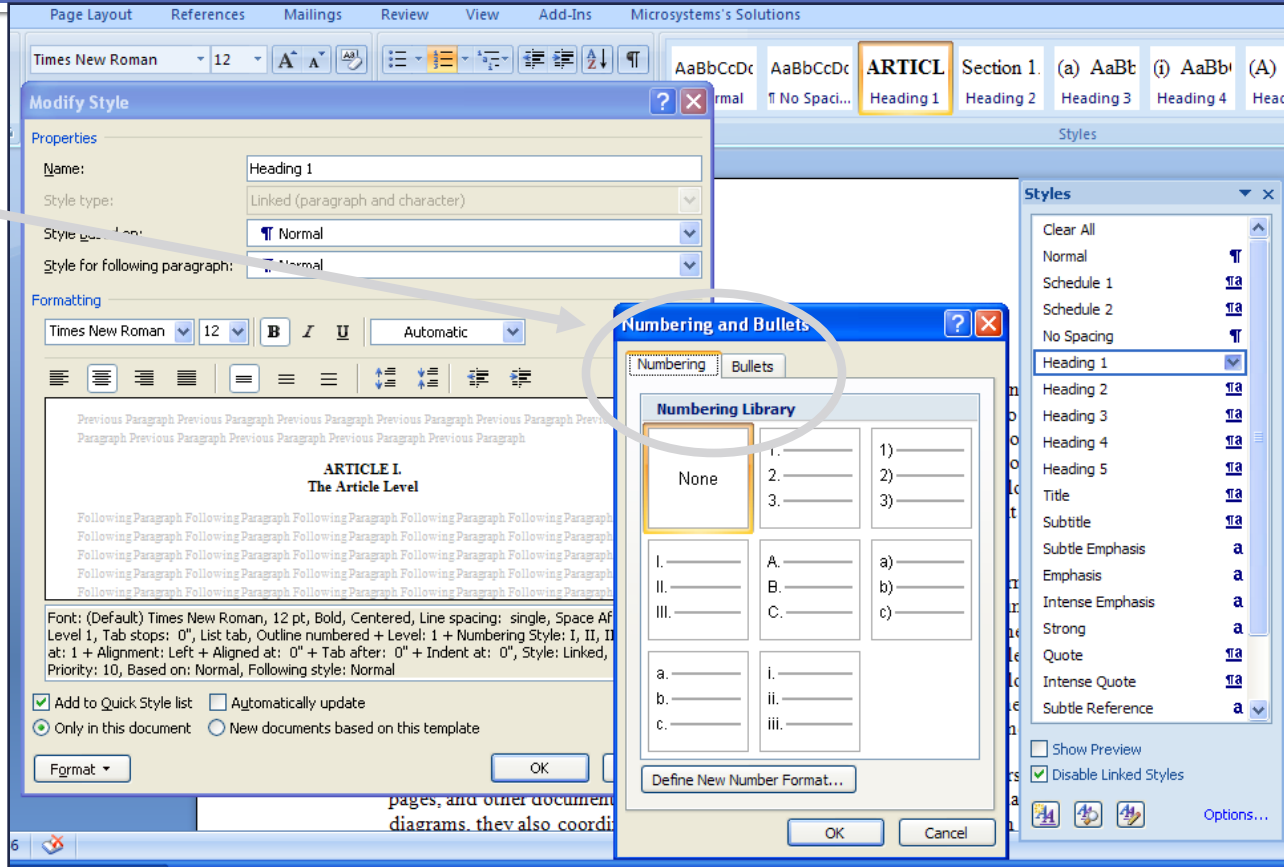
# 2003: Access to Outline Numbered Lists

The image shows two dialog boxes overlaid on a Microsoft Word 2003 document. The 'Modify Style' dialog box is in the foreground, showing the 'Properties' tab for the 'Heading 1' style. It is based on the 'Normal' style. The 'Bullets and Numbering' dialog box is also open, with the 'Outline Numbered' tab selected. The background document shows a heading 'ARTICLE I. The Article Level' and a list of paragraphs. The 'Bullets and Numbering' dialog shows a grid of preview options for outline numbering, including 'None', '1 Report Para', '1.1 Report Para', '1.1.1 Report Para', and 'ARTICLE I. The Article Level'.

2003 Format | Styles | Modify | Format | Numbering

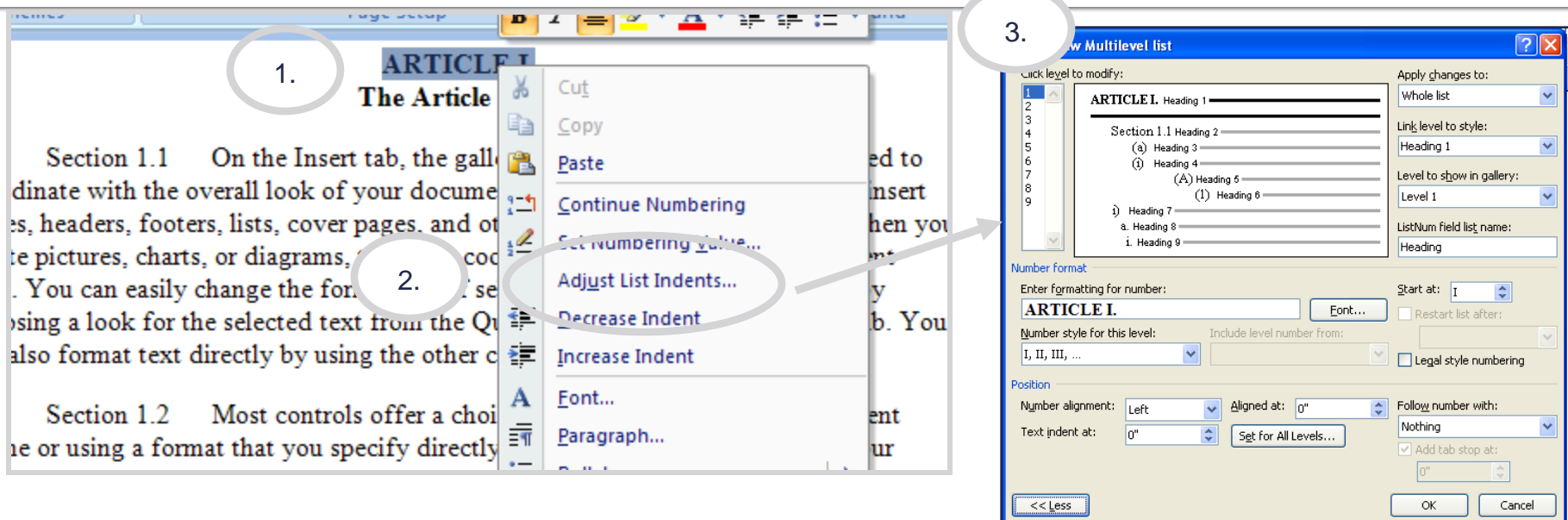
# 2007: No Access to Multilevel Lists

Word 2007 provides no access to Multilevel Lists (formerly known as Outline Numbered Lists) through Format | Styles



2007 Format | Styles | Modify | Format | Numbering

# 2007: New Method for Modifying List



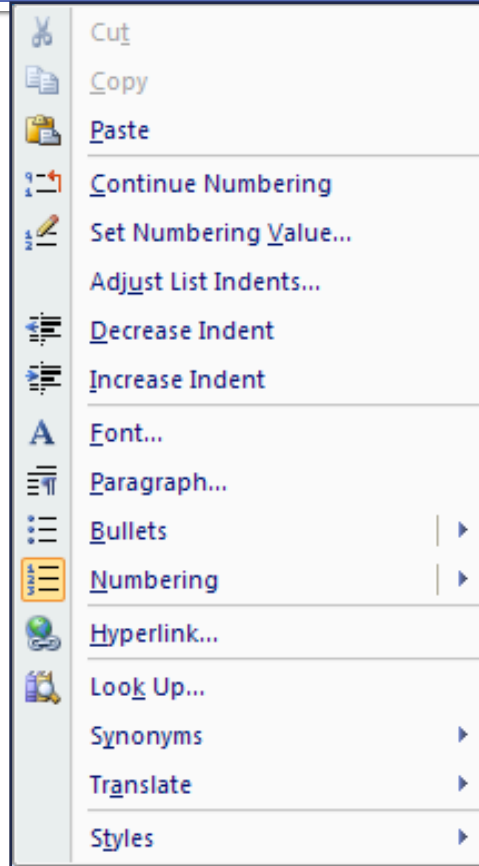
## Word 2007: New Method to Modify Multilevel List

1. Click to select the Multilevel List number, (right-click)
2. Choose Adjust List Indents...
3. Choose desired options on Define Multilevel List

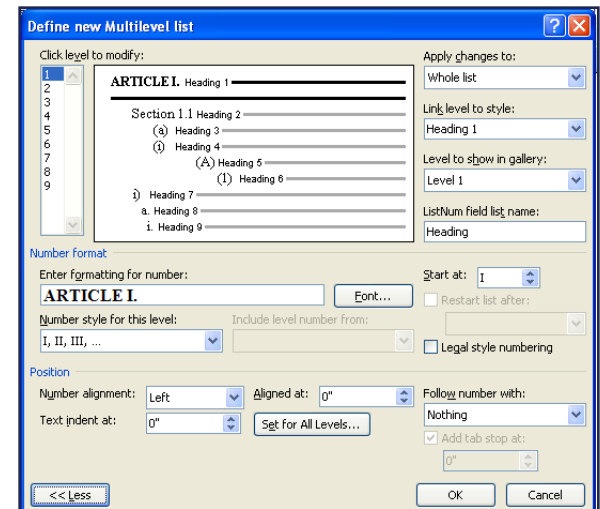
# 2007 Numbering in Action



2007 Home | Paragraph Group



2007 right-click



# Across the Pond...

- Global 200
  - New York: 38 firms, NY WLUG
  - London: 20 firms, UK Document Excellence Group
  - [Kim Walton](#)  
Professional Services Development Manager  
Denton Wilde Sapte LLP (London)  
The interview:  
[Creating a legal agreement industry standard](#)  
(27 minutes)

# Task: Update Templates → 2007

## Container

- OB | New → Blank
- Verify OB | Word Options | Advanced
  - Compatibility settings
  - No font substitution
- Page Layout
  - Establish margins, section properties
  - Header/Footer content

## Styles

- Create New Styles → new template
  - OB | New | OB | Save As | Template
- File | Open → old template
  - Delete extraneous styles
  - Rename (alias removal, custom)
  - Remove content, OB | Save As (new)
- OB | Open → new template
  - Insert | Object | Text From File → (modified)

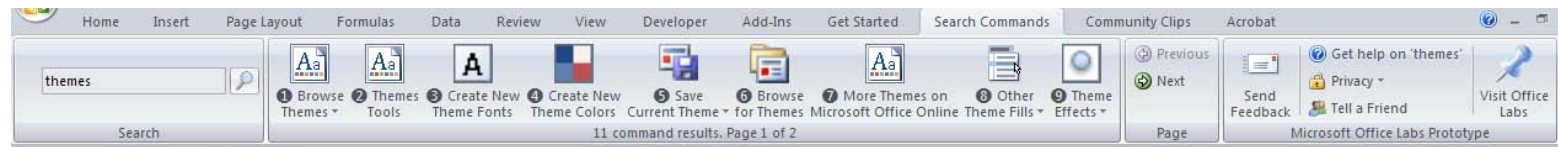
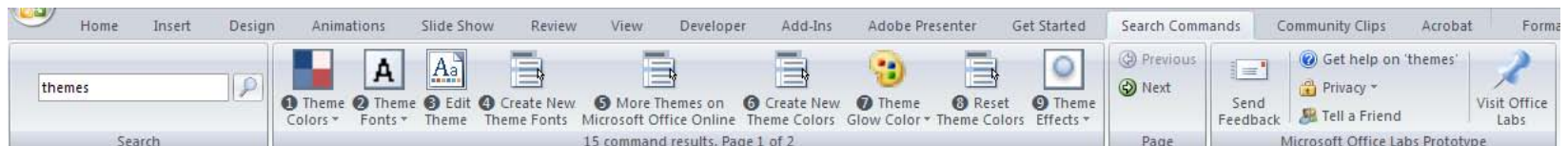
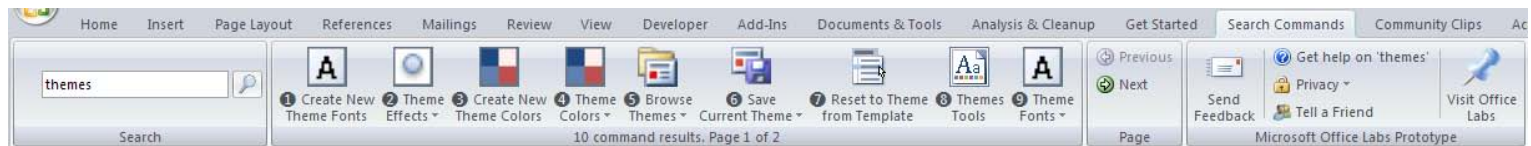
## Other

- Interface elements
  - Toolbars → (no synonym; QAT?)
  - Keyboard shortcuts: manual...
  - Custom menus → (no synonym)
- AutoText entries (.DOT only)
  - Extract, verify applied formatting
  - (Select) | Insert | Quick Parts | Save Selection to Quick Parts Gallery (*name.DOTX*, or *Normal.DOTM*)

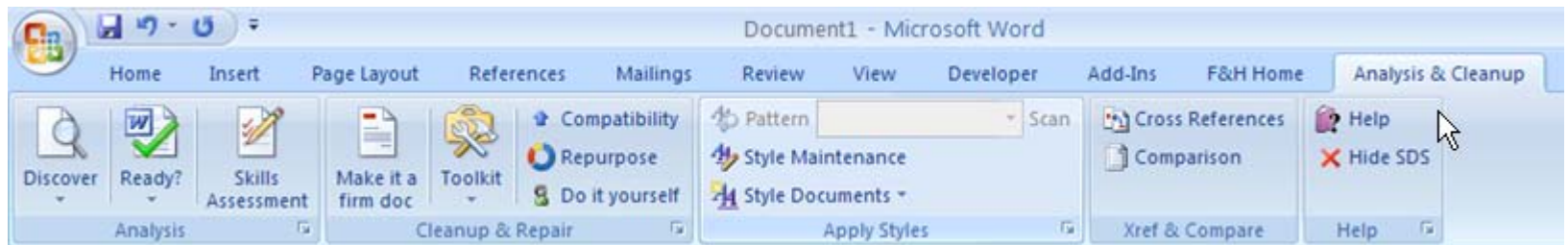
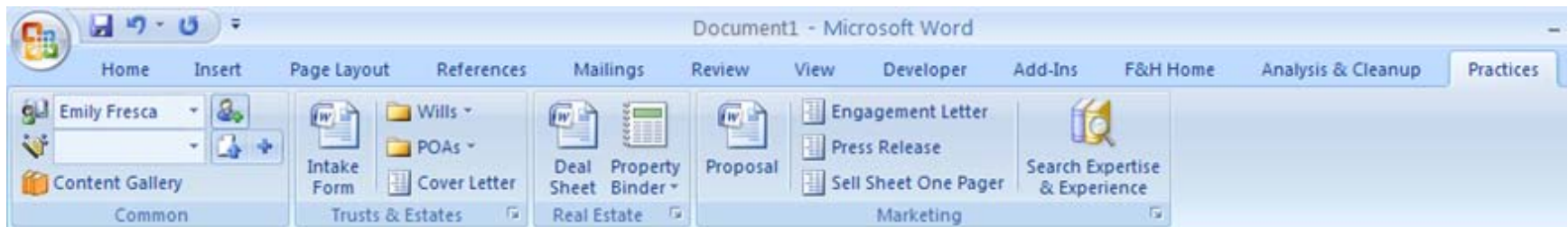
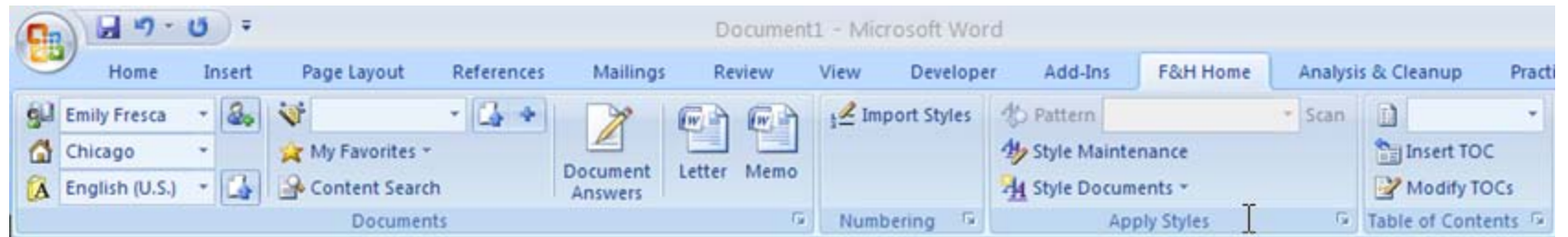
# Bonus Content

# Example: Office Labs

- The Search Commands Ribbons
  - Word, PowerPoint, Excel
  - Free download from <http://www.officelabs.com>



# Example: Ribbon Designs



## Ribbon Gallery

# Managing Complex Change

Change

Vision

Consensus

Skills

Incentive

Resources

Action Plan

Confusion



Consensus

Skills

Incentive

Resources

Action Plan

Sabotage

Vision



Skills

Incentive

Resources

Action Plan

Anxiety

Vision

Consensus



Incentive

Resources

Action Plan

Resistance

Vision

Consensus

Skills



Resources

Action Plan

Frustration

Vision

Consensus

Skills

Incentive



Action Plan

Treadmill

Vision

Consensus

Skills

Incentive

Resources



# Task: Learn Word 2007 "By the Numbers"

## Word 97-2003

Number of Styles:	10,000
Number of Bookmarks:	16,379
Number of Fields:	32,000

## Word 2007 Limits

Parameter	Limit
Number of bookmarks	2,147,483,687
Maximum # of styles	4,079
Maximum # of comments	2,147,483,687
Maximum # of fields	2,147,483,687
Subdocuments in Master	255
Maximum # of moves	2,147,483,687
Range Permission max #	2,147,483,687

## Word 2007 Compatibility Mode

Parameter	Limit
Number of bookmarks	16,380
Maximum # of styles	4,079
Maximum # of comments	16,380
Maximum # of fields	2,147,483,687
Subdocuments in Master	255
Maximum # of moves	32,752
Range Permission max #	32,752

# Next steps

- DocXtools V6
  - Customers: Request your download & installation of DocXtools Version 6
  - Non Customers: Contact John Brennan ([johnb@microsystems.com](mailto:johnb@microsystems.com))
- Visit our Web site, sign up for Webinars, newsletters: <http://www.microsystems.com>
  - Our next webinar on Sept 23
    - Human Resources: Progress and Simplify Your Skills Assessment Workflow (Open Access)  
[Register »](#)
- Contact me: [sherryk@microsystems.com](mailto:sherryk@microsystems.com)