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The Migratory Path of Word: moving from Office 97 to XP/2003…

Do I need a conversion, or merely a compass?

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The Migratory Path of Office...

No matter what version of Word you're currently in, a migration to a later version of Office is somewhere in your present or your future. And when your documents make the move, too — whether you leap from 97 to Office XP, make a slight segue from 2000 into 2002, shuffle back to Word 6/95, or intend the exciting maneuver into Office 2003 Editions — at best, you'll need a compass; at worst: a wholesale redesign.

The document's intention is to be that compass. But before going anywhere, wouldn't you like to know: "What are other law firms are doing?"

"What are other law firms doing?"

What we currently know about Office upgrade strategies is:

- some Knowledge Partnership members — well on their way from Office 97 to Office XP — made a switch midstream to go to Office 2003, instead;
- nearly half of our Knowledge Partnership membership plan to skip Office XP and move into Office 2003 in the later part of 2004 or early 2005; and
- those currently in Office XP are holding at that level, at least for the time being.

"What should *we* be doing?"

With this momentum afoot in the legal community, anticipate challenges whether you're moving up, or on the receiving end of any of the *six* active versions of Word in the marketplace. Whatever your intentions, you're likely pondering:

- "What preparations should we be making for our move?" OR
- "We're in 97 or 2000; what *influence* will 2002/2003 have in my collaborative pursuits?"

Read on for answers to these — and many more! — questions!

"We're moving. Where do we start?"

While every organization has its unique requirements, there are some common steps to take, and a few some to avoid… The table below is by no means a complete project plan, but should at least focus your research and actions at the critical beginning stages:

Goal	How?
Learn the capabilities of Office XP/2003	Office XP online Office 2003 online NEW! from Microsystems: Office 2003 Research Map
Evaluate important fill-in forms to refactor them into Web-based methodologies: • PDF fill-in forms? • HTML-based forms? • transition to InfoPath 2003 or XML? • connect such that they can leverage critical data repositories?	Define requirements of each form: • data repositories leveraged? • printable or on-line only? Determine best technology leveraged Decommission from current repository
Assess current work product against Firm standards	DocXamine and DocXtools
Review your templates, precedents and masters: • do they represent the quality standards of your firm? • do they align to your firm's "Best Practices"? • do they align to your training program?	Request consulting or migration services
Refine training goals; customize document-based review and deploy to desktop to reinforce training initiatives	Consulting + DocXamine/DocXtools
Implement new software choices	• consult with respective vendors • infrastructure requirements • desktop requirements
Define your deployment sequence	• consult with respective vendors • schedule technology strategy session with all vendors/players involved • plan your project accordingly

"We're staying put: Will 2002/2003 have an *influence* on my documents?"

Absolutely! You'll want to know more than the document 'gotchas', because knowing the capabilities of the latest version of Word enables you to speak intelligently to your clients and collaborators, and to leverage its broadened feature set.

So, how much do you already know — and how much do you need to know? Assess your knowledge using Microsystems' interactive <u>document impact assessment</u> quiz. Its lessons include:

- The best format to use when collaborating with track changes
- Which filter best assists in a troubled-document scenario
- What features 'get lost' on the way back to a lesser version of Word

What *are* the document 'gotchas'?

What special brand of 'gotchas' will your migration path attract? The table below illustrates a few of the issues most common in each maneuver:

Trail	Issues
6/95 → 97 or later	Legacy Heading Numbering Compatibility options Legacy Cross References Table borders Legacy symbols/fonts {SEQ}/{AUTONUM} field code-numbering
97 → 2000	Compatibility options "Fractured Footnotes" Sluggish Table performance
97 → 2002	Compatibility options "Fractured Footnotes" Table layout Table borders Linked "Char" or Word-generated "Style + "styles File size increases > "Embed Linguistic Data" File size increases > "Embed Smart Tags" Hidden paragraph to Style Separator "Disable Features Not Introduced After" Track Changes: 'markup balloons'

Trail	Issues
97 → 2003	Compatibility options "Fractured Footnotes" Table layout Table borders Linked "Char" or Word-generated "Style + "styles File Size increases > "Embed Linguistic Data" File Size increases > "Embed Smart Tags" Hidden paragraph to Style Separator "Disable Features Not Introduced After" Inability to File | Save As | WordPerfect

The good news is these 'gotchas' are easily reconciled once inside Word 2002 or Word 2003. If, however, you'd like to clean out some of your previous legacy, or alter your document's design decisions, read on for some added directionals...

Migrating from Word 97 to Word 2002/2003 -- some directionals...

Binary formats — the same!

You'll be pleased to know that the binary format of a Word 97 document is the same as the binary file format for Word 2002 or 2003. This means you're less likely to require a wholesale conversion project. However, there are issues you'll want to be aware of before, during, and after you make your move into 2002 or 2003. Before you move ahead, look both backwards *and* forward:

Looking back: How'd you get to Word 97?

If your document population assumed a Word 97 binary format from another application — perhaps WordPerfect, perhaps Word 6/95 — how'd you get there? If you FileOpened from either of these versions, and your documents contain numbering, or legacy styles, abandoned formatting methods, or insertion of graphics, you may need some type of intervention. We find the most troublesome Word 2002 and 2003 documents are Word 97 documents with a checkered past. If your content moved into Word 97 the right way, however, your documents are 2002/2003-ready!

Look ahead: Do you have any redesign initiatives?

Most organizations moving from Word 97 into Word 2002 or 2003 intend to refactor *something* in their move, whether that be:

- hidden paragraphs into the new style separator
- style consolidation
- an interface-lift (e.g., fewer toolbars, simpler menu choices, cleaner and more accessible features)
- adding metadata for an upcoming XML initiative;
- forging a unified document environment and branding due to a recent merger;

- ■ "Know-how" or precedent document clean-up and reformatting; or
- ■ introduction or acceleration of Smart Document, InfoPath or PDF adopted for more automated document assembly and workflow.

In these cases, the migration from Word 97 to Word 2002 or 2003 is less of a *conversion*, and more of a "mass makeover" of the authoring environment as you currently know it.

If you find yourself in this mode, give our Solutions Center a call (630-598-1100). They'll put you in touch with the right folks in our Consulting team to assist you in your planning, preparation and project definition.

Application-based considerations

We've worked with several Knowledge Partnership members as they've made the move from Office 97 to Office XP — just as we're working now with several clients planning their moves into Office 2003. The issues noted below have been experienced by several of them — and us! — and we pass along their findings and fixes for your benefit.

A bad move: "Disable Features introduced after Word 97"

Special Alert:

Whatever you do, don't Disable"…

Whatever you do: resist the temptation to force the "Disable features introduced after…" setting (Tools > Options > Save> "Disable Features Introduced After Word 97") to 'on'. While it seems like a good idea to maintain compatibility between your internal staff, during the period of time it takes to get through your migration, or it would provide external benefits to the Word 97 clients you may work with on an on-going basis, you'll regret having to *retract* the setting down the road…

Word 2003: Tools | Options | Save dialogue
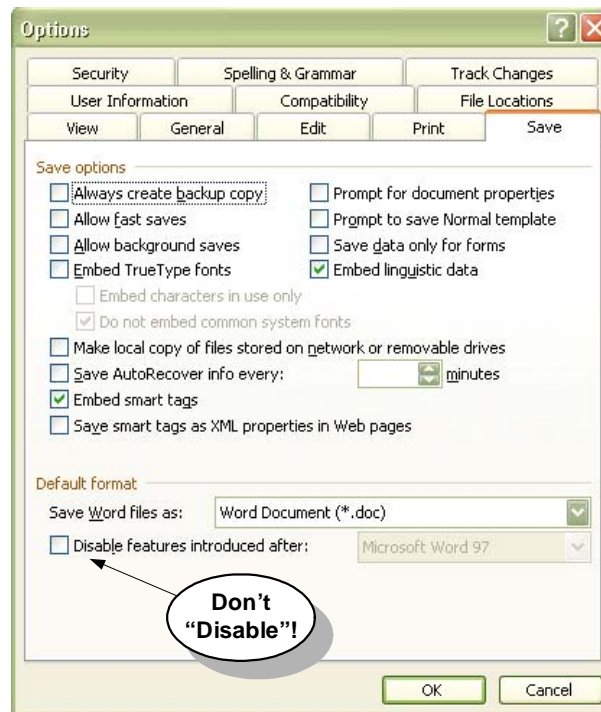
Under the hood, the feature has two parts — one part application-based, one document-based. Unfortunately, a VBA bug in Word 2002/2003 'disables' your ability to fully turn off this functionality.

For more details, check out the news postings on Google Groups which refer to Microsoft trouble ticket number: SRX-030529603033.

Features Lost in the Shuffle Back to Lesser Word Versions

As we've mentioned, Word 2002 and 2003 maintain the same binary format as Word 97. This means your Word 97 clients can open documents you've created and saved with Word 2002 or 2003. However, know that when features introduced *after* Word 97 are applied in a document using Word 2002 or 2003, then opened in Word 97 or Word 2000, these features *may not* maintain the same formatting seen in the later versions.

These features are:

- use of 24 bit color
- use of nested tables
- HTML cell spacing and padding
- table-wrapping
- underline colors
- decorative underlines
- gutter positioning on top
- text-wrapping line breaks (graphics)
- floating text-wrapping with graphics in tables
- graphics positioning (middle or bottom aligned objects, relative to line or character)
- digital signatures
- Asian text formatting features
- HTML formatting features (frames, linked style sheets, DIV borders)
- Smart tags

Security-minded in 2003

Because Office 97 had no security, and Office 2000 had very little security, the enhanced security settings of Office XP — and the elevated settings (e.g., "Very High") in Office 2003 Editions — may force you to rethink how you install add-ins, global templates and other macros.

Office 2003 users: you'll want to check out the addition of "**Very High**" macro security which declares that *only* macros installed in trusted locations are permitted to run (see Figure 1 below, and Macro Security Levels in Office 2003 in the Office 2003 Resource Kit), and the new and Information Rights Management feature which restricts access, editing and/or formatting permissions for Office Profession Edition 2003 applications. Trustworthy computing begins to unfold…
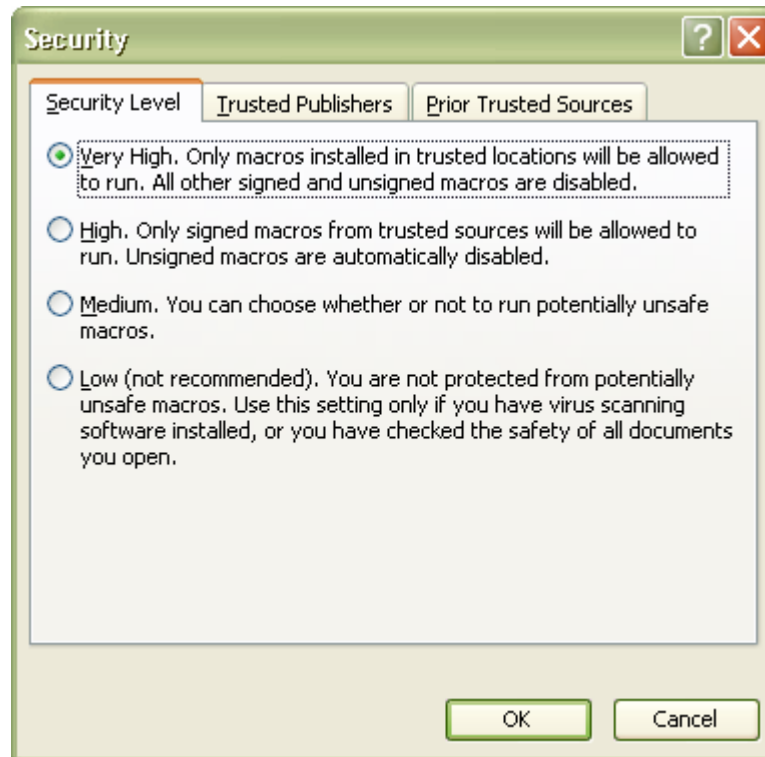
Figure 1 – Macro Security in Word 2003

You won't be able to File | Save As WordPerfect any longer!

Although most of us finished our WordPerfect conversions awhile back, you may have occasional needs to produce a WordPerfect edition of your work. With the release of Office 2003 Editions, a new converter pack retires the previous converter packs, and *no longer* includes an export method to WordPerfect. The *import* or File | Open side remains for both WordPerfect 5.x and 6.x, but you can no longer File | Save As WordPerfect 5.x.

Should you need to go back to WordPerfect, we'd recommend using the **File | Save As | "Word 97-2003, & 6/95 RTF"** filter for this purpose.

Gratuitous & Linked Styles in 2002/2003: Word makes them up!

If you've seen your documents spontaneously populate with random character styles whose names end in the word "Char", then you've stumbled upon Word's new "linked styles" feature! This feature was introduced in 2002, and remains in 2003. You'll experience issues with this feature as you attempt to unify your templates, or automate style operations as styles can become double- and triple-linked without realizing it! To find and fix these styles, we've provided the following tips: both using native Word and Microsystems DocXstyles/DocXtools. We'll also tell you one way we know of to avoid their creation.

(Note: If you know of additional ways they are created, we'd be interested in know — send us email at help@microsystems.com and we'll include your insights in our next Knowledge Base update!)

To "spy" them in Word 2002/2003:

1. While pressing the Shift key, drop-down the "Styles" list on the Formatting toolbar.

2. When present in a Word 2002/2003 document, they'll be revealed in this special view of the Styles list (see .Figure 2 below).
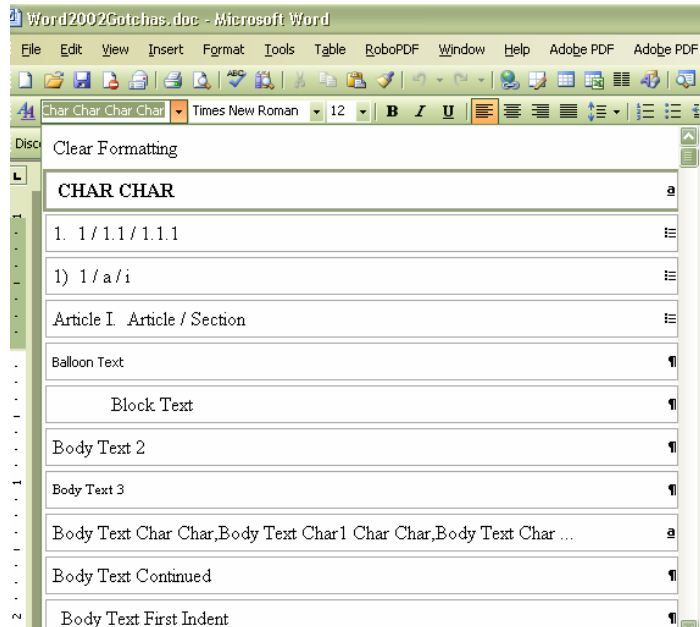

Figure 2 – "Char" styles 'revealed'

NOTE: If they're present in the document, they'll immediately be exposed when opening the document using Word 2000 or Word 97.

To introduce a "Char" style in your document (for educational purposes only!):

1. Apply the "Body Text" paragraph style to a paragraph of text.

2. Select the first few words of the paragraph.

3. Once again (where first?), Apply "Heading 1", this time to the selected characters.
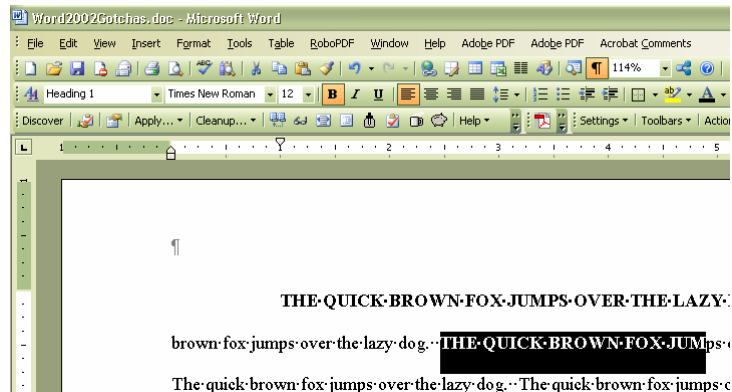
Figure 3 – Heading 1 "Char" style created

4. Hold down the Shift key, then drop down the Styles list in the Formatting toolbar -- notice the new addition, a character style named "Heading 1 Char".

NOTE: This is a new behavior in Word 2002/2003; when invoking this technique in Word 2000 or Word 97, only the character formatting associated to the Heading 1 style would be directly applied to the selected text.

To "fix" the "Char" style problem:

Because, by definition, "Char" styles are linked to another style, they can be troublesome to eliminate: when you delete them, they'll delete all applied formatting too...If they?? are few of them in the document, you might consider renaming them to more appropriate names, however realize: they'll remain 'linked' to their governing paragraph style.

In some circumstances we've seen these styles become overly populous, or 'chain-linked', such that MANY paragraph styles are affected. One trick our Solutions Center discovered was to:

- open the document in Word 2000 where linked styles are not 'supported'
- create a new character style or styles to have desired character formats
- replace all "Char" styles with your new character styles
- delete all the offensive "Char" styles, and Save
- then reopen in Word 2002/2003 to verify the result

To curtail the creation of "Char" styles in your document:

To curtail the creation of "Char" styles in your document, never select individual characters when applying paragraph styles; apply paragraph styles at an insertion point OR make sure that at least ONE paragraph marker is contained in your text selection.

NOTE: We are unaware of any means by which this functionality can be turned off in Word 2002 or 2003.

Migratory indents in 2002/2003: The ListTemplate strikes again...

Check out Microsoft Knowledge Base article 812637 — seems the number position on some customized outline schemes 'collapses' upon opening a

Word 97 file in Word 2002. If you're experiencing the problem and are in Word 2000 or 2002, don't worry — Microsoft has a hotfix available. As for Word 2003, we're still awaiting details…

Nullified numbers in 2002: "Page 0"

We've seen this one at two clients, both of whom realized the issue when using previously-designed document templates which contained tables and/or text frames in the header or footer. The issue's symptom is that page numbers unexpectedly begin numbering at "0", and no amount of altering the "Start At" value corrects the issue (see Figure 4 below).
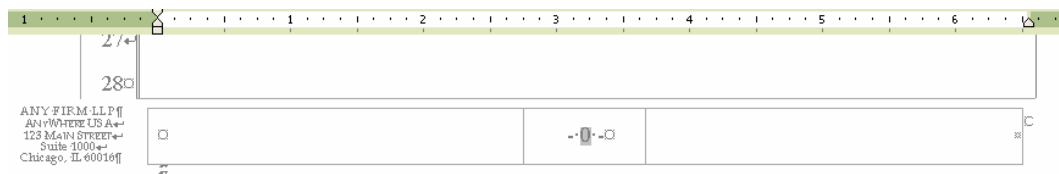
Figure 4 – "Page 0" issue in Word 2002

Should you experience this issue in 2002, we successfully worked around the issue by converting the Text Box into a Frame; in another situation, the client installed the hotfix noted in Microsoft Knowledge Base article 292158. NOTE: This issue is resolved in Word 2003.

Endlessly repaginating: "My VBA code didn't do *this* before!"

We've found Word 2002 has many sensitivities *not* experienced in previous versions of Word, especially when querying the paragraph object for information such as "Is the paragraph in a table?" The document will paginate excessively, and your routines will have significantly diminished performance. We eliminated all uses of "`Selection.Information(wdWithinTable)`" in our code, and recommend you do, too!

Application-based treasures

Stability

Office XP and 2003 Edition bring greater stability to the Word authoring environment. That, coupled with "Open and Repair" (see below), mean you'll spend less time wondering where your document went and why!

ListTemplate tallies

Word 2002 and 2003 has such curative properties where list template build-up is concerned! If you're finding an excessive number of list templates in your Word 97 or Word 2000 document (e.g., `?ActiveDocument.ListTemplates.count` in VBA's Immediate Window), you'll love that Word 2002 clears them out. Simply File Open in Word 2002, File Save As in Word 2002, then reopen in the previous version of Word — instant excising of list templates!
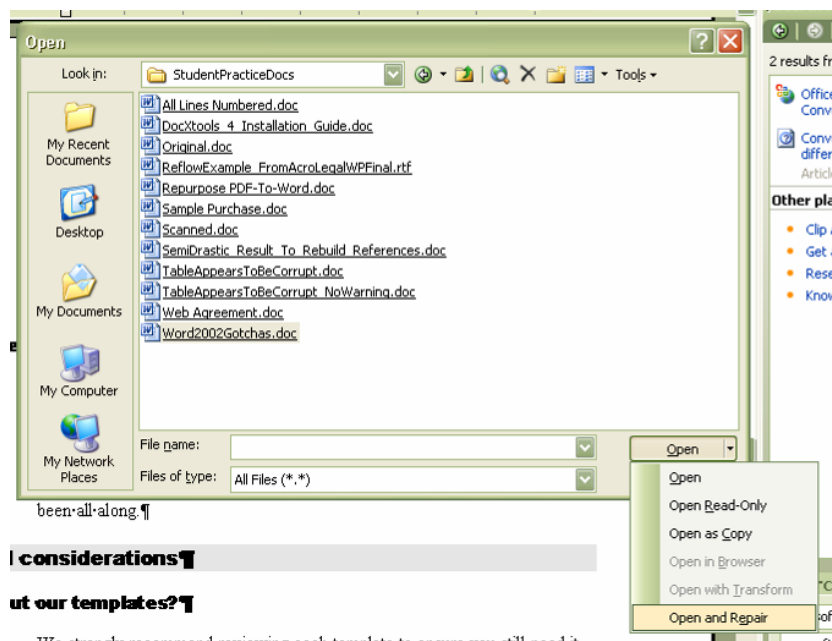
They'll love multiple-select.

Your users will love the ability to multiply select non-contiguous text blocks — and the ability to highlight all occurrences of a string when using Edit > Find. We love it too!

You'll love "Open-and-Repair"!

This buried treasure (File > (drop-down) > Open and Repair) will be one of the most-often used features in your Word 2002/2003 shop, just as it is at Microsystems. We use it to cure files which previously would not open, as well as on files which opened, but seemed to behave badly after editing for awhile. Take care, though: often the 'repair' removes content and/or formatting in an effort to cure the document's ills… To use Open and Repair:

1. File | Open, then select — but don't open — the desired file.

2. Pull-down the menu at the Open button, and choose "Open and Repair".

3. Microsoft Word will repair all known issues, and list them in a confirming dialogue. Click OK to continue editing the repaired file.

Turn a template into a document…

The macro virus of Word 6/95 whereby templates — then, the only Word file type that carried macros — masqueraded as documents, brought us an inability to File | Save As a template into a document. You'll be happy to know that Word 2002 and Word 2003 gives us this capability! Serves as both a fast way to exorcise AutoText entries from a template, or a nice way to turn an inappropriately-saved template back into the document it should have been all along.

Document-based considerations

"What about our templates?"

We strongly recommend reviewing each template to ensure you still need it — besides: when *was* the last time you revisited your templates? You may be able to eliminate templates, but for those you need to keep around, make sure you 'remake' them. There are many curative properties to reconciling ListTemplates and stabilizing numbering in Word 2002/2003, from which your templates will benefit. Steps toward a template makeover are:

In Word 2002:

1. Using Word 2002, File | New to create a new blank template.

2. Use Insert | File, bringing your Word 97 template into your new template.

3. Make any necessary modifications, and File | Save your updated Word 2002-edition template.

In Word 2003:

1. Using Word 2003, File > Open your templates.

2. Then, to eliminate the binary build-up in your template files, File | Save As XML, and File | Close.

3. Next, File | Open, then File | Save As "template".

4. Make any necessary modifications, and File | Save your updated Word 2003-edition template!

Don't forget your AutoText!

As part of your template makeover, don't forget to revise your Auto Text entries -- they need to represent your improved or altered design intentions!

Compatibility Options

Your legacy work product, when opened in Word 2002 or 2003, will maintain compatibility with its original authoring app. As you move documents up, ensure Compatibility Options are advanced from "Word 97" to "Word 2002" or "Word 2003". If you don't change these options, expect to see the following symptoms:

- Fractured footnotes
- Lost formatting

What Microsystems offerings will help me make the move?

Microsystems suite of products, and its Solutions Center, training and consulting services are Word 2002- and 2003-aware. Some options you may want to explore include:

DocXtools

DocXtools assesses, cleans, and formats documents. Indispensable for those who want to easily produce quality Word documents.

DocXtools can be configured to launch on open, or can be invoked on demand — and we give you the ability to design or define workflow messages delivered right to the users desktop!

Some examples of how DocXtools has been implemented into client sites:

- Update to XP or 2003 Button

  We have clients whom created an Update to XP/2003 button for their toolbar. Then, at the users' discretion, they can open and update the document to desired XP/2003 settings.

- Analyze on Open

  DocXtools can be setup to analyze a document on open. If the Compatibility Options are set to Custom or Word 97, we can automatically make this change before the user starts working on the document.

- Update Document with New Styles

  When migrating from Word 97 to Word 2002/2003, many clients have decided to change their style names. DocXtools Apply features can be used to apply new styles to appropriate paragraphs.

To isolate "Char" styles using the DocXtools or DocXstyles "Style Manager" feature:

1. Launch Style Manager.

2. Drop-down the "Find" button, choose "Advanced Find By Format."

3. Choose Properties > Style > Properties > Name, pull down Condition and choose Contains.

4. Type a value of Char, followed by a space, and click on Add to List.

5. Find Styles. The offending styles are listed.

Special Note to DocXtools users:

DocXtools default Discovery rules seeks out "Char" styles by default.

DocXamine

DocXamine performs automated document analysis, accelerating your ability to:

- analyze a repository of templates and masters against a firm's best practices
- conduct document-based reviews of student results, either during or after training classes
- pre-assess work product intended for reuse, *before* trouble strikes!

DocXamine's default shipping rule set includes test for many of the document 'gotchas' introduced by Word 2002 or 2003 (such as compatibility options, linked "Char" or Word-generated styles). Imagine an automated method for uncovering the templates or masters in which these conditions exist *before* they infest your overall document repository? A sample report is shown in Figure 5 below.

Figure 5 – Sample DocXamine report

DocXchange

DocXchange converts WordPerfect or legacy Word documents into the latest version of Word or PDF. Satisfactory results guaranteed.

DocXchange has been updated to be fully Word 2002- and 2003-aware. Among the features added are the ability to alter compatibility options, automate Word 2002 or 2003 optimally (e.g., minimizing repagination episodes), and be sensitive to the presence of new style types (e.g., list styles and table styles). Should you require an update, feel free to contact us at help@microsystems.com.