

What's New

When a Microsoft Word 2013 application is first run, you'll see the brand new Start screen. This automatically shows the Blank document as well as many available Microsoft templates. Ideally your integrator will set this up with any existing templates you use on a regular basis, and possibly hide the templates that don't relate to your practice.

Once in Word you'll see the standard Microsoft Office Ribbon, Tabs and Quick Access Toolbar. The two main differences here are the new Design tab that holds the Office themes. It's doubtful this will be heavily used for legal documents.

The File tab (Backstage view) has been pretty well redesigned. Pressing the Esc key on the keyboard or clicking the back arrow will take you back to your document.

When opening or saving a file keep in mind Microsoft is providing more cloud options. Many of your existing files will be opened from the Recent Documents list or the computer icon, unless you're integrated with a Document Management System.

When emailing a document from the open file, you'll now find Email in the Backstage view under Share. With a standard install of Office 2013, you can either send the Word attachment or publish the file to PDF or XPS file format.

As most legal documents have an abundance of headings, numbered or otherwise, you'll eventually run into the new Expand and Collapse feature. Next to a heading that has a sub heading, note a very dim triangle. Clicking that triangle will collapse and expand heading text. This is a great feature when the editing focus is on one section. However, if you didn't know the heading was collapsed you may wonder what happened to the text. Use the triangle as a toggle. Even better, set all documents with collapsed headings to open with expanded headings. Apply the setting in File>>Options>>Advanced>>Show document content>>Expand all heading when opening a document.

You're now able to open and edit a non-secured (password protected) PDF in Word 2013. Watch for format rendering as it may change slightly. Once you're finished editing, save the file back to a PDF or as a Word file. Use the 'Save as type' list near the bottom of the Save As dialog. The original PDF will not be modified.

Easily lock a contract or agreement for Track Changes only with the new Lock Tracking feature. Set this in Review>>Track Changes>>Lock Tracking. Word will prompt you for a password when you click Lock Tracking. This way anyone else who opens the file can ONLY edit with Track Changes turned on. The password will be required when you click the Lock Tracking menu item again.

Just A Few Known Issues

As of this writing there are a few gotchas to be aware of. 1) Sometimes the print settings are sticky. Until you restart Word, be sure to check the settings before printing again. 2) The much used Table of Contents will need some work, as TOC is now placed in a Context Tab that doesn't allow the final right aligned tab to be moved outside the right margin. Even when going through the Tabs dialog box, you can set the tab outside the margin, but you cannot then control it in the Ruler. You may see this as an issue when you open existing documents with a TOC.

Conversion/Compatibility

Law firms still have many Word files in the .doc format. Something to be aware of when working in a .doc file is that as soon as you click the File tab to get to the Backstage view, the most prominent feature is the Convert button next to the Compatibility Mode feature. Once you click the Convert button the file is automatically saved as a new Office 2013 .docx file. Upon Save, the .doc file is gone (yes gone) and the file is now in the .docx format. If you think you may still want that .doc file, be sure to make a backup copy of it before clicking Convert as well as a Save As to make a copy.

There is no telling how quickly your clients or associates will be migrating to Office 2013. Some are just now upgrading to Office 2010. With a brand new Word 2013 file, before 'round tripping' the document for collaborative purposes be sure to check the Compatibility. Click the File tab>>Info, and click Check for Issues>>Check Compatibility. If you know the version of Word someone is using, click 'Select version to show' list and see what feature or functionality the document may lose when the recipient opens the file.

Conclusion

Microsoft Office 2013 is different enough to warrant several professional services. The first recommended service would be to talk with an experienced Microsoft Office integrator (migration specialist) about your current work environment and workflow: Someone who can take you through all of the backend features to determine exactly how Office should be configured prior to deployment, this is particularly important if you have any templates. Microsoft has moved the default template location. This is very disappointing for law firms who rely heavily on templates. Also, any 'Known Issues' particularly with Microsoft Word, as that's your critical application for legal documents.

Secondly is a training provider who will at least work with your IT Department and Trainers for the legal, new, dropped, or changed features, and again, 'Known Issues'. Don't forget the Word Processing Department as they do take the bulk of Word projects. If you're a smaller firm, look into some interactive online training so you won't need to lose too much staff time for the in-house or off-site training.