



Document productivity

Driven from the Ribbon

They say that documents are the lifeblood of the legal profession. If that is true, then it should come as no surprise to anyone that Microsoft Word is probably the most used application at a law firm. And at the heart of the application is the Ribbon, which puts all the commands a document specialist would need right in front of them. This article looks at how Word users can get more from the Ribbon to help them be more productive.



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Take command of the Ribbon

In 2007 Microsoft introduced the Ribbon to give users access to commonly used commands in the application. Over the years, document specialists have become used to working in this space. But there are multiple Ribbons with multiple features, which most users do not need or use regularly. So, having a Ribbon designed for your job role or the task at hand gives users what they need when they need it.

The Microsoft Ribbon is customisable. Organisations can arrange the tabs and commands on the Ribbon in any order. They can hide or unhide Ribbons and choose to display only those commands relevant to the organisation. So, how and where should you start to customise.

Start with a plan

Customising the Ribbon requires thought and planning. Ask questions: do some departments work on specific documents that require certain functionality? Could we create document specific Ribbons? For example, could you add the ability to create Table of Contents or Table of Authorities in legal documents but not in memos? Do different job functions need more functionality or less? For example, consider what features document specialists creating legal documents such as agreements, leases, pleadings, etc. need compared to those who normally create letters and file notes.

That said, do not overcomplicate it. Make sure the features are well laid out and clearly labelled. If the Ribbon becomes too cluttered, you may need to consider adding more with each covering different groups of tasks.

Take the time to succeed

The Ribbon Designer must explore these questions with all stakeholders, which should include representatives from different job functions within each department. This process takes time and should not be rushed or short-circuited. It is often an iterative process. Create example Ribbons before discussions and use these as examples so stakeholders can visualise the potential outcome.

Once the customisation is complete, the Ribbons can be pushed out centrally across the firm using Active Directory, for example, to determine how Ribbons are distributed and who sees what.

Make it personal

Of course, it is impossible to customise Ribbons for every single member of staff, so for individual preferences, users should be encouraged to use the Quick Access Toolbar (QAT). You can provide a customised QAT, but allow users to add their favourite features, so it becomes their personalised Toolbar.

Users can add features to the Ribbon by right-clicking on the button of the Toolbar and selecting **Add to Quick Access Toolbar**. If the feature you want to add isn't on the Ribbon, simply click in the Customise Access Toolbar drop-down and select the More Commands option. From here you select a command and click the Add button to add it to your customised Quick Access Toolbar. Once you have made your selections, click the OK button. You now have all your commands on the Toolbar for quick and easy access.

Stop application hopping

With document production, there are many stages in the process; creation, review, collaboration, comparison, and distribution. And yes, much of this can be done directly from Microsoft Word using native functionality. However, it is fair to say that legal professionals need specialist tools for these processes as Microsoft Word functionality does not meet the stringent requirements of law firms.

For example, take Track Changes or Microsoft Word Compare for document comparison. Neither of these options provides a redline output; nor do they accurately show changes in Tables, Header/Footers, Footnotes, or Tables of Content. The same can be said of template management, metadata cleaning, recipient checking, document review, and

document styling. Therefore, law firms will rely on third-party vendors to provide these capabilities rather than using Word.

Consider which third-party vendors features should be added to the firm's Ribbon to ensure that often used applications and commands can be accessed from the Microsoft Word Ribbon. Otherwise, document production specialists will spend an inordinate amount of time jumping in and out of applications to get the job done.

Configure don't customise

Try to avoid customising functionality that affects the way Word works. Much of Word functionality is configurable to meet your firm's needs. By creating Office themes and building cover pages, standard tables, headers and footers etc., you not only ensure brand consistency but provide users with a quick and easy way to build documents. Add custom galleries to your customised ribbons to make it easy for users to choose the correct building blocks for your documents.

While adding your own, consider removing out-of-the-box themes, building blocks, and styles that users do not need.

Get what you need

Microsoft Word offers users an amazing number of great features and functionality, which unfortunately, most will never use or need. Rather, document specialists tend to use the same features on a regular basis, however, they are located on different Ribbons and drop-downs. Putting regularly used features onto a Ribbon gives them easy access to the features they need when they need them, which ultimately speeds up the document creation process.



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