

Avoiding Document Gaffes!

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Preventable Errors

In previous posts we talked about Accelerated Authoring™ as a collection of tools and methods to enable improved productivity for knowledge workers and about using about using Content Controls to create highly formatted documents.

Systematically preventing errors in published documents is the subject of this post.

The Document Inspector

Comments, revision marks, embedded questions and other content not meant for general publication have been a major pain point for Word users.

Word 2007 provides the Document Inspector – a tool for preventing distribution of the content that you don't want to share. This post first describes the Document Inspector in Word 2007 and then provides suggestions for readers working on earlier versions of Word.


How to Get to the Document Inspector

Click on the Office Button, choose Prepare and then choose Inspect Document.

When the Document Inspector runs, it deletes information permanently. Saving your document before running the Document Inspector is a good practice.

Watch Those Aggressive Default Settings

The default settings for Document Inspector can be, in my view, a bit too aggressive. For example, by default it inspects headers and footers. When this document was inspected, it offered to remove the headers and footers – accidentally selecting Remove All, would erase the page numbering and other information that I want to keep in the published document.

 **Headers, Footers, and Watermarks**
The following items were found:
* Footers
Headers and footers may include shapes such as watermarks.

Remove All

Choose Your Settings

Product managers, proposal writers, technical authors, attorneys, and many others work on documents that use Track Changes through multiple review cycles. The documents are likely to be festooned with comments, revisions, and other markup that is not meant to be shared outside of your group. Hidden text is sometimes used as well in the preparation cycle but should, often, not be distributed. (In one case I

received a contract where the lawyer had drafted the document with one set of demands – apparently his client’s resistance points – in hidden text and a more stringent set of demands in regular text.)

On the other hand, you probably want to keep information such as headers, footers and watermarks which make your document look good. And, for documents such as invoices based on an underlying XML schema, you would not want to remove the XML data from the document.

Deciding when to run the inspection on Document Properties is a little trickier. Often, properties contain personal information that is, well, personal. On the other hand, the out-of-the-box inspector can be a bit callous – eliminating the document title or keyword along with the name of the document author.

Customizing the Document Inspector

As noted above, the out-of-the-box Document Inspector works in broad strokes. Deleting, for example, genuinely personal information in document properties together with important meta data about documents.

Word 2007, however, enables creating new inspector modules that meet very specific needs – your needs – using the "DocumentInspectors" collection type. Check the MSDN for explanations and sample code for how to implement customized Document Inspection using Microsoft VBA.

Example of Customizing the Document Inspector

Our customer used to refer to his product that combined bridge and router functionality as a “brouter”. Very cute, but nobody knew what they were talking about. Corporate issued a directive – always specify “bridge and router in a single box” and never again use brouter.

The trouble was that hundreds of employees were used to writing brouter and no corporate directive was going to change their habits overnight.

The solution will be to automatically replace all incidences of “brouter” with ““bridge and router in a single box” – and have the automatic replacement a part of the document inspection functionality. Implementation would be done by creating a shared add-in using Visual Studio.

What if You Use Word 2003, XP or Earlier Versions?

The good news is that you can use VBA to create tools that mimic the functionality of Document Inspector for earlier versions of Word – or get ready made from Method M. Method M has out-of-the-box tools for Word that meet most document quality needs.

Bottom Line

Worries about distributing confidential information, personal details, internal discussions and out-of-date product names can be eliminated using document inspection. Word 2007 users can customize Document Inspector. Users of earlier versions of Word will need to create custom VBA as well – or call Method M to see how our off-the-shelf tools can meet your needs.

The bottom line is that concerns about the quality of published documents can and should be handled automatically – not matter what version of Word you're using, but some VBA programming will be required or help from Method M.

As always, our goal is to support staff focused on creating great content.

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