



Growing Beyond Microsoft Word

Microsoft Word is amazing software. Often installed by default on professional workstations, Word is ubiquitous: almost everyone has worked with it at some point during their career. And, just when you think you've mastered it, you find fifteen more functions you didn't know existed!

It is no surprise, then, that many organizations build their documents initially in Word. It enables teams to collaborate on content, build formal documentation, and distribute to end users. But is Word always the right choice?

This brief will answer important questions about your use of Word, including:

- WHY you may need to transition away from Word.
- WHEN you should consider such a transition.
- HOW you should plan to make the transition as cost-effective as possible.

Why?

Many organizations find it difficult to give up Microsoft Word until they suffer a serious software failure. The risk of failure, however, is always present, especially when a document has lived a long and robust life. A key element in the risk profile for Microsoft Word is that it is a **word processing tool**, not a **desktop publishing application**. However, because most people can use the basic functions available in Word, it often gets co-opted to do the job of a heavy-duty desktop publishing application.

For example, an instruction document might start as an English-only file with two images over six total pages. Microsoft Word works beautifully for this purpose. Over time, ten more images are added to the file and it is translated into seven languages. It has now become an 80-page file with a total of 96 images. At this point, the file has become significantly less stable simply because it is much larger (both in length and in file size) and it is dealing with the co-existence of multiple fonts and character sets. Most users have "felt" a bit of this instability when waiting for a large file to open: it takes longer and longer for the images to appear and for the scroll bar to stabilize.

Beyond the inherent instability of this large file, it is constantly being handled by multiple users, each of whom tweaks sections of the document in different ways. This combination of styles causes a non-optimized structure for the overall file, which further increases the risk of instability.

Translations add yet another layer of complexity. Translation agencies offer consistency and price discounts by running documents through translation software called CAT (Computer-Assisted Translation) tools. (To learn more about how these tools work, check out [our related brief](#).) The file conversions involved in the use of CAT software further destabilize elements of Microsoft Word, such as headers, footers, and font data.

Eventually, Microsoft Word will, in all likelihood, be unable to handle the strain of multiple users, too many pages, lots of images, multiple fonts, and ongoing conversions for a given file. Translation activities can be the straw that finally breaks the poor DOCX's back. And when this happens, the file will become corrupted. Of course, you want to transition your content before the file corrupts and becomes unusable.

There is a second, less obvious reason for making the transition: just because everybody can make changes to a document doesn't mean they should. When you are updating a critical, controlled document, you don't want to be bogged down by trivial preferences from every member of the review team. But if it is too easy to add an edit here or there during the review cycle, these preferences may creep in and derail your timeline. All the things that make Microsoft Word great can make it a little too easy for everyone to become an editor. By moving the critical document to a desktop publishing application, however, changes must be planned before they are sent to the team member who can physically update the document. This small change can make it significantly easier to get the final stamp of approval from the review team without additional, preferential changes.

When?

So how do you know when it is time to transition? The timing will differ depending upon your needs, but here are some handy benchmarks.

Consider transitioning to a desktop publishing application when:

- You need to include more than 4-5 languages in the same file.
- You need to include any language that reads right-to-left, such as Arabic or Hebrew.
- You will be adding many images, especially large ones, to the same file.
- Your final print format is more than 3-4 columns per page.
- You start to notice that the file is slow to open.
- You see any font instability in the file, for example letters appearing in a different font or as a different size than the letters next to them.
- You find that you need to fix the formatting every time someone edits the file.

It is also worth thinking about the cost of the transition. It is most cost effective to have your translation provider transition your document from Word to another format during a significant content update. This helps avoid a pure copy/paste operation, which should be avoided because:

1. It is very easy for the person doing the copy/paste to create an error.
2. In order to check that no errors have occurred, you'll need to pay someone to do a full, word-by-word verification.

In the end, you will get more bang for your buck if you combine a format transition with a content update because your translation provider can use the new English format as the input to their CAT tool. In this way, your provider's standard workflow kicks in to ensure nothing gets overlooked during the transition.

How?

You're ready to give up Microsoft Word for a particular document. Where do you begin?

First, plan your printed format. Will this be a simple booklet or a large foldout? What paper size and margin will you use? If your document is multilingual, you can gather some extra tips in [our formatting brief](#). As you plan for the final format, you can determine which application will best meet your needs—for example, an Adobe product like InDesign or a more robust content management system.

Next, plan the re-design. This could be performed by an internal team member with experience in desktop publishing, a graphic design partner, or your translation provider. It is easiest to start with the English first and use placeholders for any translations that will be added later. Remember: most languages are longer than English, so buffer your English by 20-30% to ensure you have enough room for the translations. As the new format comes together, you can determine which elements of the file will be single-language and which might need to be multilingual (for example, the cover page or symbols table).

Now that you'll be using a desktop publishing application, you have better control over your graphics. Gather optimized graphics files that are text-free. You can place these high-resolution graphics into the base document and include any textual elements directly in the main file. This saves you money on translations because your translation provider will not need to do separate editing of the graphics for each language. It also allows the graphics text to appear in higher resolution, which makes your overall document more attractive for the final reader.

Last, plan your document control. After dedicating time and energy to making this format transition, you will want to keep all the component parts for your new and improved document (not just the beautiful PDF!). Your final records should include: all fonts, all graphics, and the design files themselves. As you continue to update this document over time (or borrow parts of it for another document), you and your translation provider will need to access and re-use these elements.

Summary

Microsoft Word is often the perfect choice for simple documents, such as instructions for use or short user manuals, when they are first created and distributed. Over time, however, a document may grow increasingly complex, with images, complicated layouts, and multiple language sets. When this happens, you may find that your team is asking Word to do more than it is designed to do. Or you may find that you want to exert tighter control over the revision process and therefore don't want to circulate a file format that can be modified on any office workstation. Whatever your reasons, the transition away from Word is a strategic decision for your organization. As you start planning, loop in the translation provider that has been working with this document for years; they may have additional suggestions that can save you time and money in the long run.

About Idem Translations

Founded in 1983, Idem Translations, Inc. is a full-service provider of translation and localization services. Idem specializes in certified translations for medical device, biomedical, and pharmaceutical companies, as well as other organizations and entities working in the life sciences sector, such as contract research organizations, healthcare research centers, and institutional review boards. The company is a WBENC-certified woman-owned business and holds certifications to ISO 9001:2015, ISO 13485:2003, and ISO 17100:2015.

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