

CONVERTING DOCUMENTS FROM WORDPERFECT TO WORD

By: Sharon Horner Gant, Esq.

CONVERSION OPTIONS

There are four ways to convert a WordPerfect document to Word. Converting using less than optimal methods will result in compounding frustration the more the document is used. As editing is needed on documents with problems in their foundation, the user can be sent into an endless rabbit hole of "minor repairs".

For documents you plan to reuse in the future, it is safest to use the fourth method listed below, copy and paste without formatting.

SAVE AS A WORD DOCUMENT IN WORDPERFECT

The result here will not match the original fully, possibly being way off. With this option, you could see significant changes in alignment of numbers, paragraphs, and titles. You should also expect to find random tabs, section and page breaks, along with a whole bunch of styles that only clutter up Word's Style's pane. If you are familiar with Word's styles, you will see that this conversion option saves all text as Word's Normal style, which itself could appear modified to something strange. If auto numbering is part of the original, WordPerfect makes decent guesses as to what those numbers should look like in Word. However, should you want to change their appearance in Word, you'll have minimal formatting options since the numbering is not connected to a paragraph style in Word.

OPEN THE WORDPERFECT DOCUMENT IN WORD

This option also fails to produce a close match to the original WordPerfect document. The formatting will be inconsistent, though with different inconsistencies than the "Save As a Word Document In WordPerfect" option. If the WordPerfect document contained auto numbering, Word will make guesses as to what the numbers should look like, but in some cases all paragraphs will be numbered with the same digit. At best you may get a basic, unmodifiable numbered list from the sample box. Notably, the Style pane will be somewhat less cluttered than when using the "Save As a Word Document In WordPerfect" option, but it will be cluttered nonetheless. Again, this is pointless since generally no style other than various versions of Word's Normal is applied.

COPY AND PASTE WITH FORMATTING

This method delivers the worst performance of the four conversion options. It brings all manner of unnecessary tabs, page and section breaks, and other formatting marks, as well as font and paragraph formatting that varies from the merely unexpected to the downright strange.

COPY AND PASTE WITHOUT FORMATTING

Copying and pasting without formatting is often called the "Scorched Earth" approach. This method is superior because editing the resulting document involves virtually no "surprise" formatting issues. While this method is the most time consuming, it is the safest conversion method and will serve you the best over the long-term. Follow the steps below to employ this approach.

STEP 1: CREATE A NEW WORD DOCUMENT

You will create the Word version of your WordPerfect document starting from a blank Word document. When saving this new Word document, in the Save as type box choose either .dotx or .docx.

The .dotx format creates a template. A template functions as a pattern that cannot accidentally be changed and can be used to make editable copies as often as needed. Think of a template as a form book or stack of blank forms. Every time you double-click on the .dotx, you are presented with a fresh document containing only the starter language and formatting you always want to see. When you hit CTRL + S (or CMD + S on a Mac) to save, Word saves the document as a new file. Absent intentional effort, you cannot overwrite a template with customizations you made for one client or one use.

The other option is saving as a .docx where any changes made - good or bad - are incorporated for future use. If you hit CTRL + S, your changes overwrite the document, replacing what you first saw on opening the document with what the document says when you hit CTRL + S. Generally, the .dotx template option is preferred for frequently used documents or those with unique settings that need to be maintained. Less frequently used or simple documents work well as .docx documents.

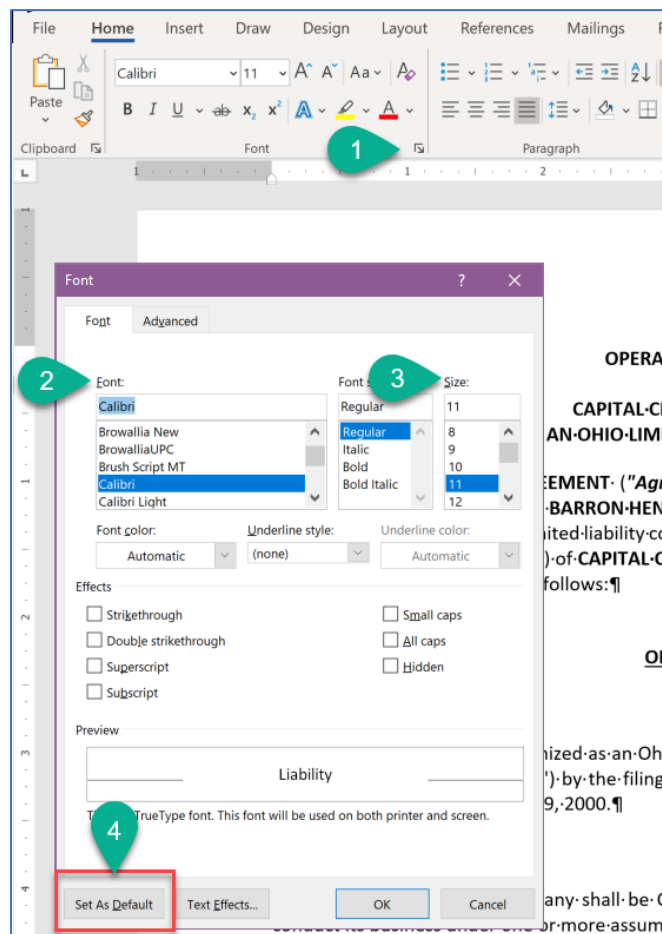
After deciding on the file format, the next important step is to set the behavior of Word's "Defaults". Word comes with features, like font and paragraph formatting, set a certain way "out of the box." But you can change these defaults to be what you want. Your job is to change these settings to work the way you prefer. Adding font or paragraph formatting on top of the Defaults may seem an easy fix, but at some inconvenient point, the defaults will inexplicably reappear. The default settings sit there in the background and, while making seemingly reasonable edits, they can suddenly appear as if they had a plan. They did - show up by default! You need a plan too! Build a solid foundation for your new document by adjusting the default font and paragraph settings so there's no unwanted formatting in the document.

DEFAULTS

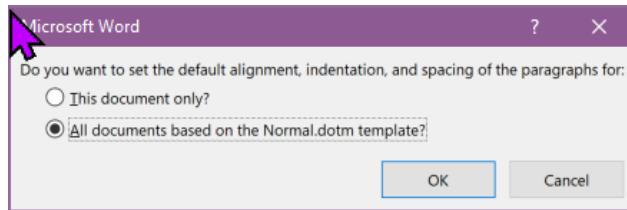
Normal.dotm is the template Word uses for every document it creates - by default. Changing the defaults means changing every new document Word will create from that point forward. You do this by changing the Normal template.

DEFAULT FONT FORMATTING

To set the default font, on the Home ribbon, in the lower right corner of the Font group, use the launcher to open Font settings. Select the Font and size the document will use most of the time.



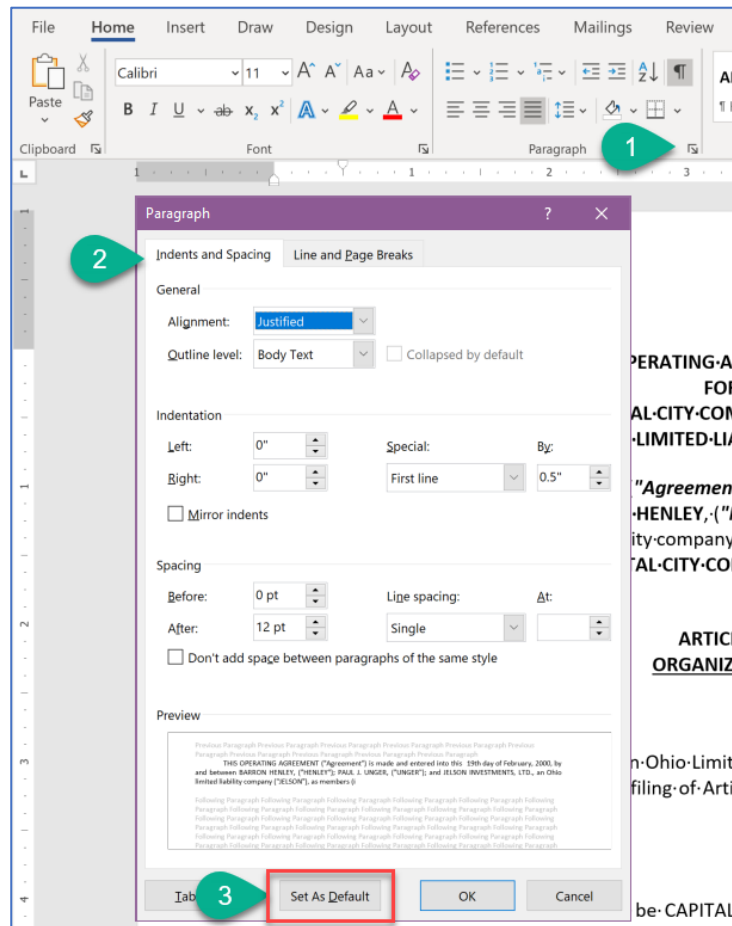
Next, click the Set As Default button in the bottom left corner of the dialog. A message will pop up asking if you want to change the default formatting for this document only or for all future documents based on the Normal.dotm. Select "All documents based on the Normal.dotm template" and click OK.



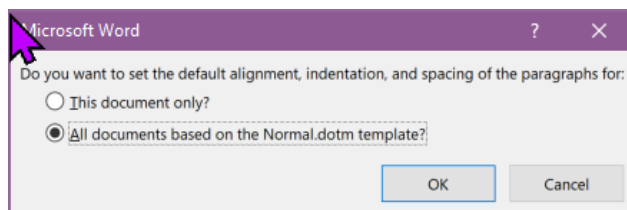
DEFAULT PARAGRAPH FORMATTING

Access the default Paragraph settings by going to the Home ribbon. In the lower right corner of the Paragraph group, click the launcher to open Paragraph settings. The desired alignment and the amount of space that follows each paragraph, both found on the Indents and Spacing tab, are among the most important default settings.

Be sure to click the Set as Default button after making your desired changes on Paragraph settings.



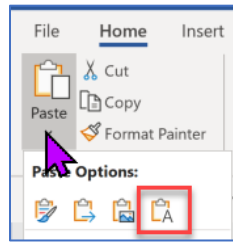
After clicking the Set as Default button, a dialog opens for you to confirm whether the changes are only for the current document, whether .docx or .dotx, or for all future documents. Make your selection.



With settings in place that serve you, you can begin with the safest "conversion" method.

STEP 2: COPY AND PASTE TEXT ONLY

Copy the text out of WordPerfect and paste into Word without formatting. Do this by clicking the down arrow under the Paste icon. Select the right most option which is "Keep text only".



This will clear any hidden codes and breaks as well as font and paragraph formatting. There will still be added spaces, returns and tabs that may have been used in formatting the original document.

Clear Superfluous Formatting

TABS

None of the tabs are needed at this point as they will be replaced by paragraph indent settings, numbering schemes, or other style settings. Get rid of all tabs by going to the Home ribbon and clicking the dropdown next to Find then select Advanced Find. In the "Find what" box, look under More on the Special menu at the bottom for Tab Character. Word places a ^t in the "Find what" box. Leave the "Replace with" box blank. Click Replace All.

HARD RETURNS

There will likely be many unnecessary hard returns in the text you have pasted. These too will be replaced with proper formatting. Get rid of all of the extra hard returns by going to the Home ribbon and clicking the dropdown next to Find. Then select Advanced Find. In the "Find what" box, look under More on the Special menu at the bottom for Paragraph Mark. It's at the top. Word puts a ^p in the "Find what" box. You need two of these so click again or type it. In the "Replace with" box add a single ^p. Click Replace All. Because sometimes there are back-to-back hard returns trying to force formatting, you may have to do this multiple time until the number replaced is in the low single digits.

STEP 3: PLAN FORMATTING

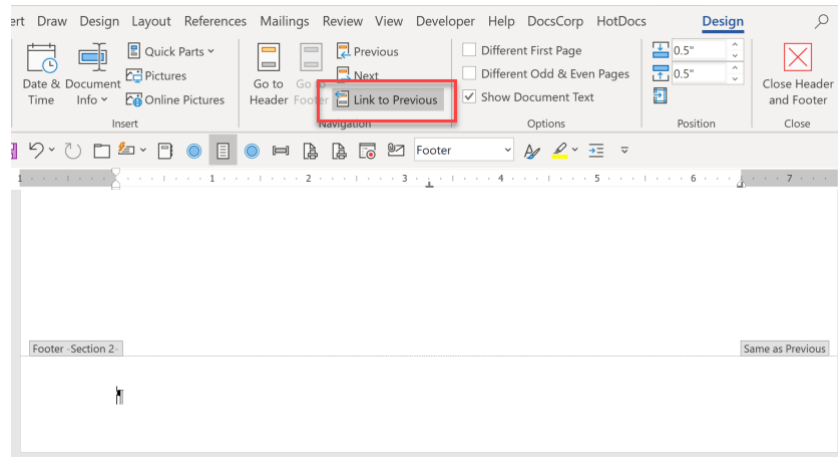
REVIEW THE DOCUMENT'S NEEDS

Carefully review your original document in WordPerfect and make a note of each of the different types of formatting you see:

- Font size and type
- Indents on paragraphs
- Paragraph alignment
- Numbers including indents and spacing at all levels
- Label and title formatting
- Lists
- Margins
- Headers and/or footers which may call for specific formatting

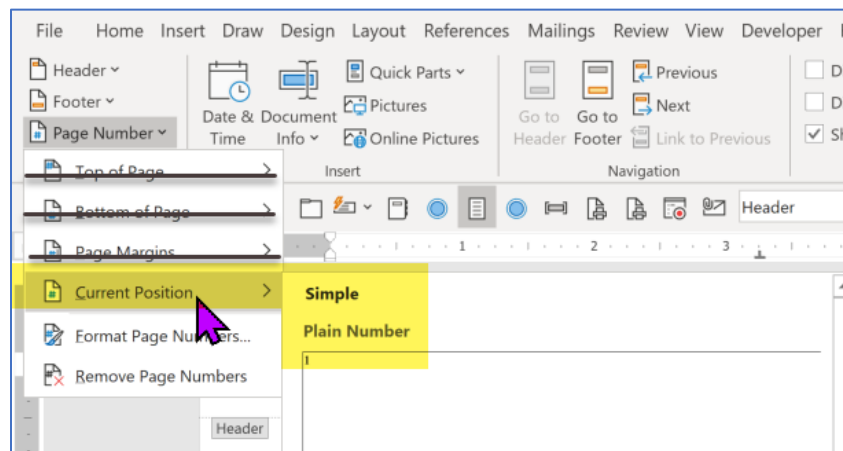
SECTION BREAKS

The start of the new document creation process is a good time to add section breaks that may be needed. Placing breaks before adding any content to the header or footer eases the setup of different page numbering or content in the header/footer areas of the document. Move the cursor to the first page where the header or footer needs to be different. Double-click on the header or footer area to open the Header-Footer tools. Be sure you are in the header or footer where the different header/footer content needs to start, then click the Link to Previous button to disconnect it from the earlier entries.



PAGE NUMBERING

When adding page numbering, do not use the top three page number options on the Page Number button. Instead place your cursor where you want the number - center or right tabbed for example – then, on the Page Number button, choose Current position and Plain Number. This way you will not get the extra paragraph mark that otherwise comes in and other content you may have placed is safe from being deleted by those top three sample formats. To change the type of number, such as to Romanettes, go to Format Page Numbers, also under the Page Number button.



DIFFERENT FIRST PAGE

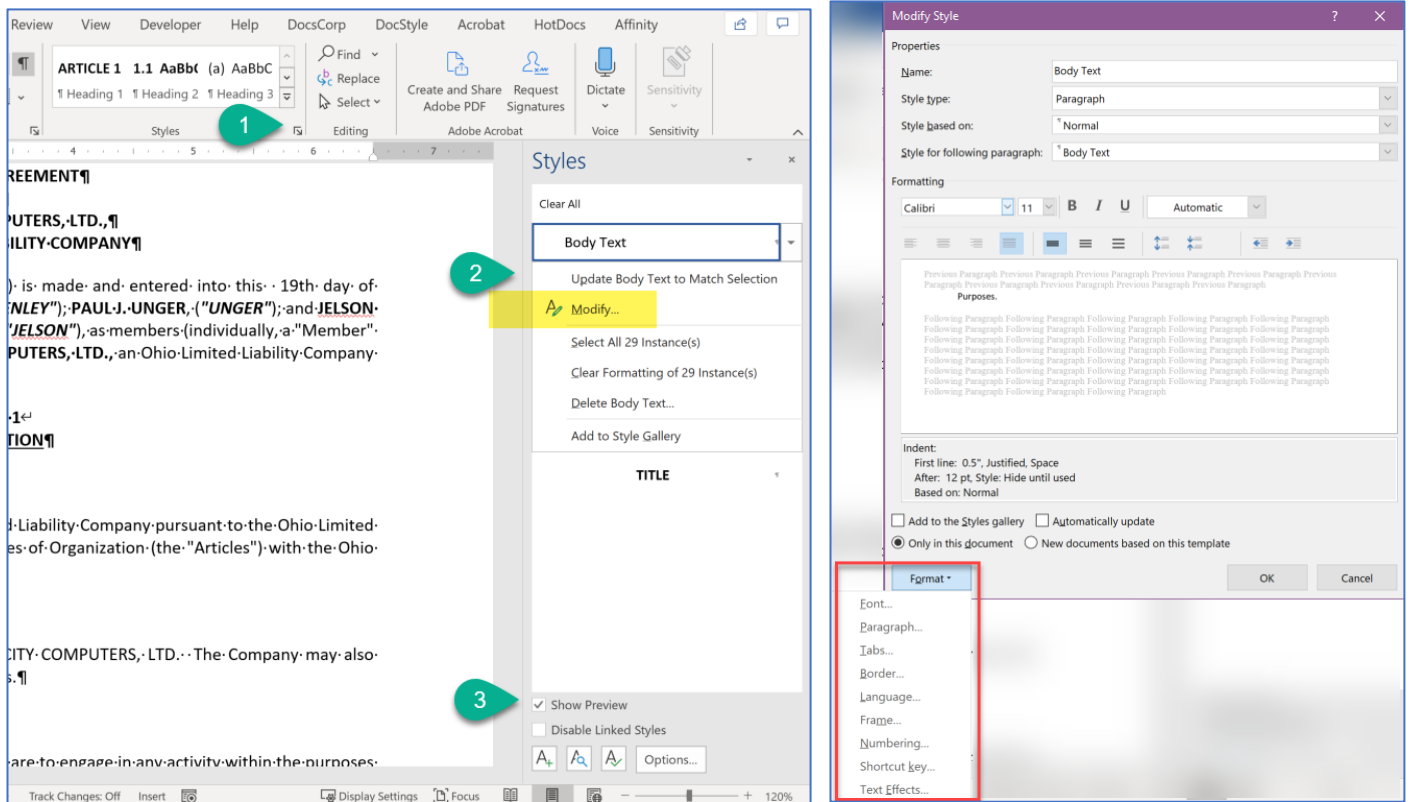
Note that using the Different first page checkbox on the Page Setup menu, Layout tab, makes the header and footer on the first page separate from the rest of the document, allowing you to keep the first page free of numbering or text, or to add a unique letterhead only to the first page. This checkbox also makes each section created after that first section also have the different first page setting until you change that setting for the sections where it is not needed such as the rest of the document.

STEP 4: DESIGN THE FORMATTING

A style is basically a custom paint color that you use to decorate your document. It is a combination of font and paragraph settings. Once combined and saved, the style can be easily applied throughout the document and just as easily updated. Styles give you a one-stop shop for document-wide changes. Learning to control styles will transform your Word experience.

There is no need to create a style for each isolated line or bit of text or segments that only need the default formatting. For example, some lines of a notary jurat are default but for the last one, adding a space after manually rather creating a style for one line is reasonable. Generally, areas of the document where formatting other than default will repeat more than a couple of times need to have a style applied. Make active use of styles rather than allowing the default passive effect of them to run things. Styles are *always* in play and having them under control makes for a smooth workflow.

The default font and paragraph settings come together in the Normal Style. You can see the Normal style as well as many others by clicking the Styles launcher. The pane that opens floats initially but will dock to the right side of the screen if you double-click its title bar. For a better preview of the available styles, check the Show Preview box



When you need a different look, browse the Style Pane and right click a style that looks close to what you need. Changes are made by clicking Modify from that right click menu. Use the Format button in the lower left corner to adjust various elements of the style as desired.

MANAGE STYLES - SORT

Browsing available styles is easier if the list is in alphabetical order. Use the Option button in the lower right corner in the Style Pane to get the list into a more workable arrangement.

- In Select styles to show, select Recommended
- In Select how list is sorted, select Alphabetical
- Uncheck all of the boxes

MANAGE STYLES - SHOW OR HIDE

At this point, we are still working on how the Styles pane list displays. This time use the Manage Styles button, second from the left in the Style Pane - the one with the checkmark.

- Go to Recommend tab
- Click the "Select all" button
- Click the "Assign Value..." button. Assign the value of 1 and click OK. Not all styles will appear alphabetical but the most used styles will.
- Click "Select all" again and click Hide
- Now go through the list to find the styles you will use. Since you're starting out, you need Normal, one or more Body Text styles and one or more Heading styles. Click Show on each to see only these in the Style Pane

STYLE CHOICES

Time to make the document look the way you want by changing styles to what you need. Select the desired style in the Style Pane, right click and choose Modify. Using the Format button in the lower left, make font, paragraph and any other setting changes except numbering - that is done in its own separate procedure. Also, for paragraphs that will be automatically numbered, do not set the indents. That is handled during design of the numbering. Important style options you want to consider include:

- For paragraphs that are not numbered, use the Body Text styles, using as many as needed for the varieties of unnumbered paragraphs you have.
- Use Title or Subtitle for titles or labels.
- When paragraphs are formatted as Title or Subtitle - use "Keep with next" on the Paragraph Lines and Breaks tab to "glue" the following paragraph to the title.
- Do not set indents for numbered paragraphs as that is handled during design of the numbering, briefly discussed below.
- The Signature style can be set to manage formatting an indented, single spaced signature block.

MAKE STYLE ADJUSTMENTS

Of the options for setting up styles, one easy way is using "Update ___ to Match Selection". To do this:

- Click in a paragraph that will use the style you are designing, for example Body Text
- Make edits using the ribbon or any of your favorite keyboard shortcuts to make it look the way you want.
- After it looks the way you want, right click on the Body Text style in the Style Pane
- Choose Update Body Text to Match Selection.

When using Heading styles to support numbering schemes, you first need to get rid of the heading formatting that comes out of the box. Again, an easy way to do this is to:

- Click on a paragraph that has style set to Normal
- Then right click on the Heading style and choose Update Heading # to Match Selection.
- Now the Heading # is plain, ready for your adjustments.
- Numbering adjustments for Heading styles include single or double line spacing, paragraph alignment, Keep with next properties, underline and other font options, and more.
- Never adjust the indents as that will be handled by the numbering scheme.

Apply your customized styles - and create more as needed.

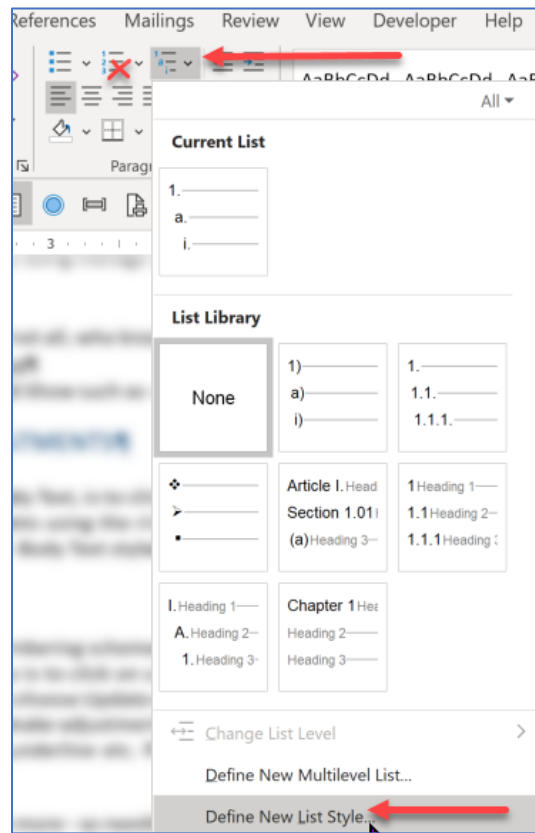
NEVER RENAME BUILT-IN STYLES

If you need a style that is more descriptive than "Body Text 2", format the style manually as desired, then with your cursor in the paragraph you just set up, use the New Style button, the first button on the bottom-left of the style pane, to create a new style, naming it as you desire. It is never a good idea to rename Word's built-in styles.

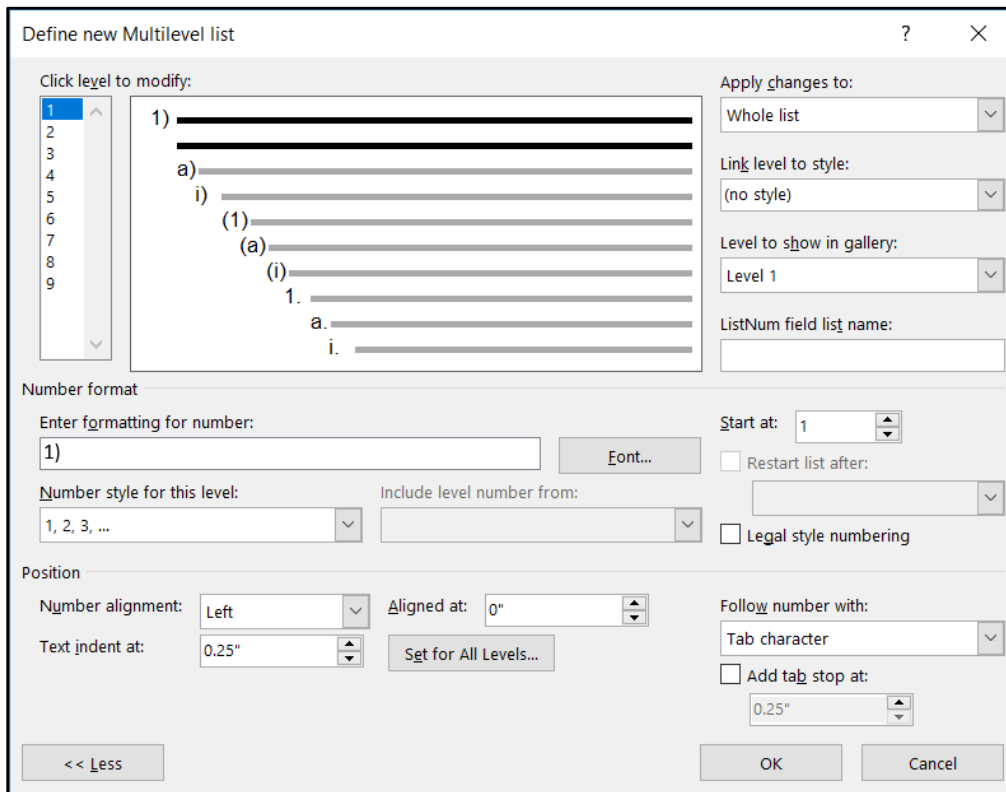
CREATE NUMBERING: MULTILEVEL LIST BUTTON

Numbering is essential to legal documents and can be challenging to understand. Training sessions and practice will deliver career-long dividends. Numbering will be smooth following the best practices you will learn in better classes. Some of these best practices include:

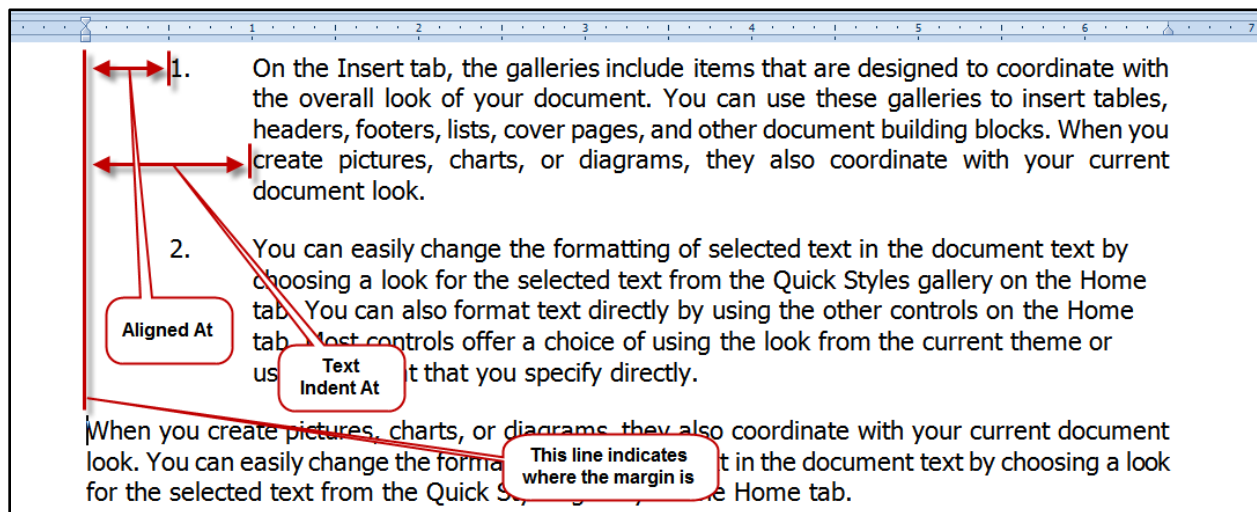
- Never pick a Microsoft sample. These are the squares with an image of a setup. Define your own for bulletproof numbering behavior. Use the Define New List Style option at bottom of the Multilevel List drop down:



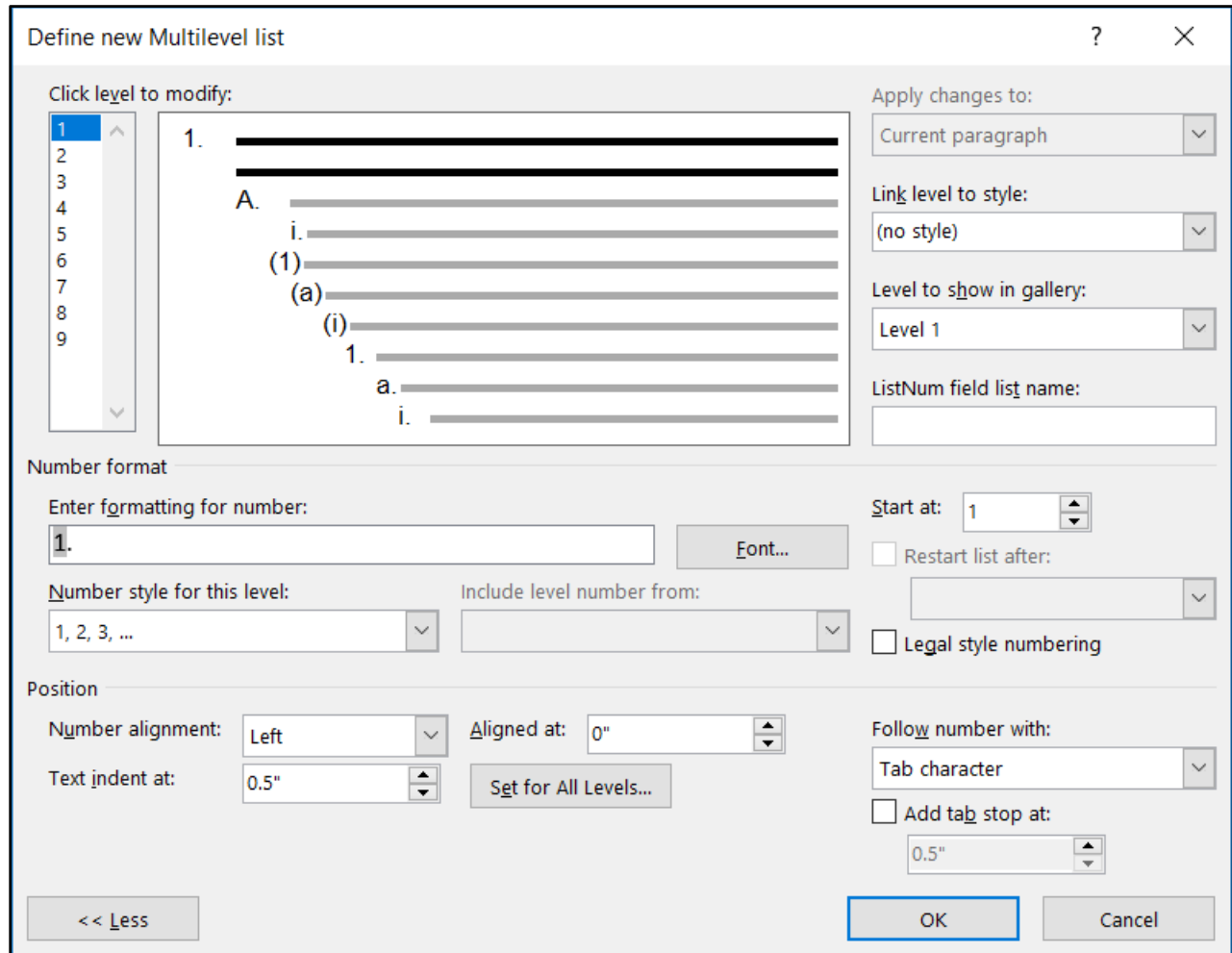
- Always link number levels to built-in Heading styles. For the primary numbering in the document, the 9 levels available in the List Style can be adjusted to fit.



- You NEVER type a number in the “Enter formatting for number” box. Instead, the code for the paragraph number is inserted when you choose something from the “Number style for this level” drop down.
- Font button should only be clicked if you want the formatting for the paragraph number to be different from the paragraph that follows it. Therefore, you should not click the Font button in most cases.
- Number alignment must always be set to Left, even if you're centering an article number.
- Aligned at means how far away from the left margin you want your number to appear.
- Text indent at means how far from the left margin you want the text following the number to appear.



- Below the dialog shows formatting for a 3-level deep outline. Levels 4 - 9 won't be used so they are not formatted.



- When you name the numbered List style, for every numbering scheme you set up, use "Numbering" as the name or at least the prefix. For example, if you are adding a second numbering scheme in the same document, preface it with "Numbering," as in "Numbering-Prayer." It is easier to return to the correct place to adjust the formatting.
- When adjustments are needed, right click on a number and choose "Adjust List Indents" to get back to the numbering scheme. Then select the formatting button in the lower left corner and choose Numbering. Adjust away.

APPLY FORMATTING

Once the styles are set up as needed, text in the document can be formatted by clicking on it, then clicking a style in the Style pane.

In addition to using the Styles pane, formatting can be applied using a shortcut key combination. As you move through the document you can click the mouse or the keyboard as needed to apply the style relevant for the current segment of text. You can also use the "Ctrl select" method to apply styles to noncontiguous segments of text on a page or throughout the document.

When you have pasted bare text there may be some bits that need to be deleted before or after your new formatting is applied. When only the text of a document that was numbered is pasted there will be a combination of digits, spaces and punctuation to be removed before or after adding the new numbering formatting.

MACROS

If there are a lot of identical replacements, setting a macro to delete then apply can make smooth work of them. In a situation with standard interrogatories with 2 or 3 lines of the same types of formatting occur, a macro can be amazing, such as this repeated sequence:

INTERROGATORY #

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim.

ANSWER:

¶

A macro could be recorded to handle all the steps at once:

- delete the plain text interrogatory number and space
- apply the numbered interrogatory label formatting
- go to the next paragraph
- apply the interrogatory body text formatting
- go to the next paragraph
- apply the response paragraph formatting
- add a blank line for the answer
- go to the next paragraph ready to go again.

The above macro could be applied using a shortcut key, as many times as needed, to format appropriate paragraphs in the document in a fraction of the time. While they can be very helpful, macros for formatting have limited use. For example, often there will be an irregular number of spaces, used as part of formatting, that can't be accounted for in a macro. Also, many different outline levels can minimize the usefulness of macros to apply needed formatting changes smoothly.

After all the plain text has the needed styles applied, save and test how making revisions in the document updates numbering or other styles. Now is the time to hunt down anything that might have been missed and to be sure the document performs the way you expect.

CONCLUSION

A rebuild of heirloom WordPerfect documents will be a rewarding project for the users as well as those undertaking the effort needed to complete the transformation. Nothing gets wasted in such a project. Not the knowledge built into the documents, the WordPerfect skills of the original drafter providing the setup to replicate, and certainly not the skills built during the conversion.