



Dashboarding Word: Revealing the Right Tools for the Write Job Right Now - Part 1 - The Ribbon Retied - The HHS Reports Tab

*Presented by the Civil Rights Office of the Texas
Health and Human Services Commission*

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Introduction

We all have them. Some of us have one in the bathroom. You might have one in the bedroom. Many people have them in the kitchen. But we all have at least one junk drawer in our house. The drawer with all those essential tools that we go to when we need to tighten a screw, hammer a nail, or even freshen our breath with a piece of chewing gum. But unless your junk drawer is well organized, it's rarely easy to find the right tool for the job right away.

When it comes to writing documents, the ribbon of tools at the top of the window in Microsoft Word can often seem like a junk drawer. Its top layer, called the Home tab, is filled with tools that do very little to a document. And if you could see the ribbon's other tabs, you could find tools that do the same job in a much better way.

But even when you dig down to find the best tool for one job, you still won't see all the tools you could use to make Word do more. It's like needing a screwdriver that always ends up at the bottom of the junk drawer. You'll have to dig through other tools you might never need and could overlook others that you do.

To organize Word's junk drawer, we created the HHS Reports tab. It's like a toolkit with almost everything you need to write or assemble a well formatted report. If you use these tools along with our recommended Word dashboard settings and templates, you will find it much easier to prepare reports that follow HHS branding guidelines and meet accessibility standards.

If you are familiar with the Productivity tab, the HHS Reports tab will look familiar. To build it, we took the Productivity tab and removed tools that don't help you write reports. In their place, we added tools that make preparing and formatting a report easier.

Download the HHS Reports Tab

To get the HHS Reports tab, go to the [Accessibility Resources page](http://accessibility.hhs.texas.gov/resources.asp) of the HHS Accessibility Center (<http://accessibility.hhs.texas.gov/resources.asp>). Under the heading "Microsoft Office," find a link that reads "*HHS Reports Tab for Word*". Click

that link to download a compressed folder, also called a ZIP folder or file. Save that compressed folder to a convenient location.

The compressed folder contains two documents.

- HHSReports.exportedUI, which is the file Word uses to build the tab.
- InstallingTheHHSReportsTab.docx, which will tell you how to put the first file to use.

To start, extract these files from the compressed folder. I'm going to export my files into my **Documents** folder, but any place you can find them is fine. Feel free to pause this video and follow the instructions included in your download or keep watching and we'll install the HHS Reports toolbar together.

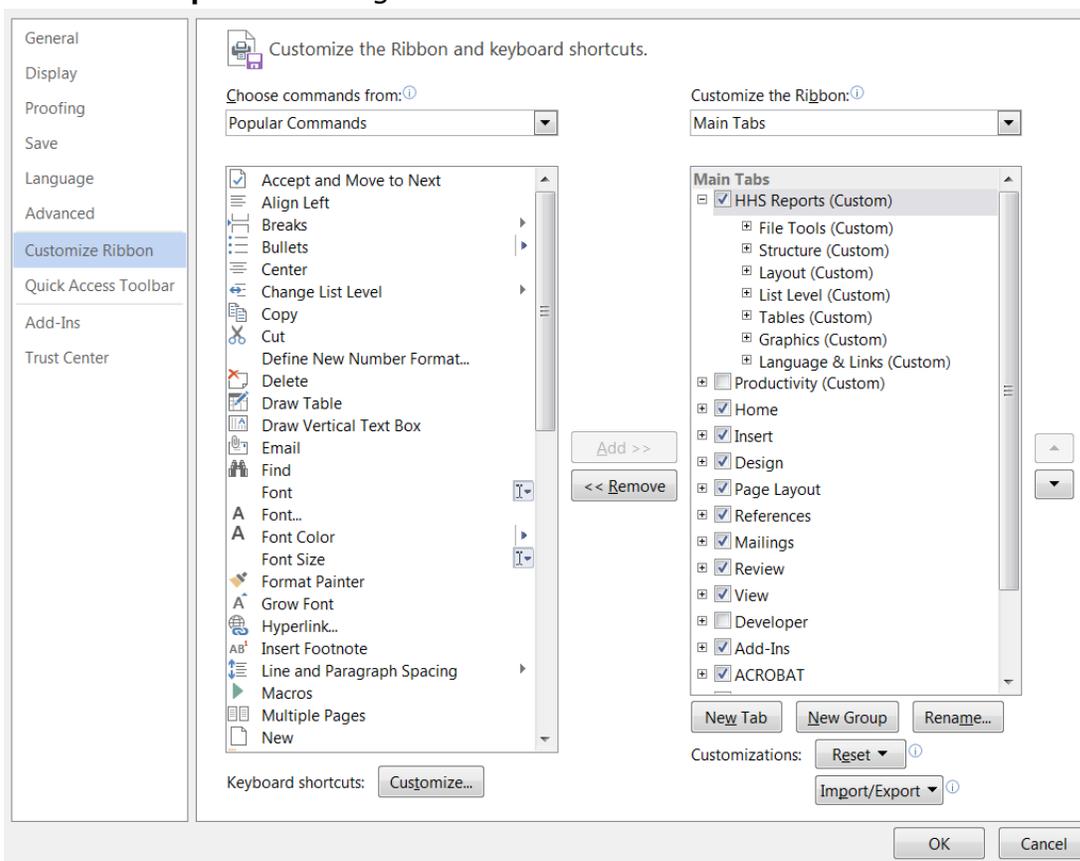
Install the HHS Reports Tab

You will need to import the HHS Reports tab to your installation of Microsoft Word.

Follow these steps to install the HHS Reports tab:

1. Open the **File** menu (the tab at the left end of the ribbon).
2. At the bottom of the left column, choose **Options**.
3. In the left column of the **Word Options** dialog box that appears, choose **Customize Ribbon**.
4. At the lower right corner of the dialog box, click **Import/Export**.
5. From the list of options, choose **Export All Customizations**.
6. When prompted for a filename, type any name you choose. I'm going to name mine **DefaultWordToolbar**. (Word will add the .exportedUI extension.)
7. Save the file.
8. Click the **Import/Export** drop-down button again.
9. This time, from the list of options, choose **Import Customization File**.
10. Browse to the **HHSReports.exportedUI** file and click Open. A warning will appear: *"Replace all existing Ribbon and Quick Access Toolbar customizations for this program?"*
11. Since we saved our current settings earlier, we can safely replace them. Click the **Yes** button.

12. The **Word Options** dialog box should now look like this:

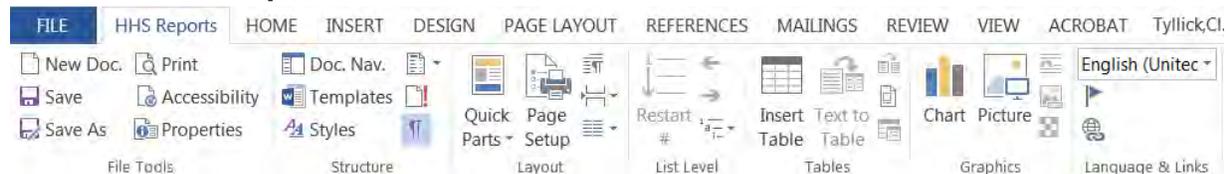


Under **Main Tabs**, the first item should be **HHS Reports**, and the check box before the title should be checked. Right below it, you will see the **Productivity** tab, which is unchecked and followed by **Home**. We have turned the Productivity tab off by default, but if you miss this old tab like those comfy slippers your spouse threw away, check the box and it will reappear.

13. To finish the installation, click **OK**.

Explore Your New HHS Reports Tab

The new **HHS Reports** tab will now be the first item in the Ribbon.



Across the bottom of the ribbon, notice the names of the groups of commands on the HHS Reports tab: File Tools, Structure, Layout, List Level, Tables, Graphics, and Language & Links. (If your Word window is less than full width, one or more of these groups might be collapsed into a single button. To see them fully, widen the window.)

Build Your Dashboard for Working in Word

In future videos in this series, we will show how to use these new tools to format reports easily. Together, they make the HHS Reports tab one of three components that we recommend you use to build a dashboard that will make you more efficient when you write reports in Word. You can open the other two components from the HHS Reports tab:

- The **Navigation** pane, which you open with the **Doc. Nav.** tool, gives you powerful ways to move around in and reorganize the document.
- The **Styles** pane lets you change the entire look of your documents in seconds.

In the next video of this series, *Two Panes to Ease Your Pain*, we'll introduce you to the Navigation and Styles panes. For now, let's take a closer look at how you can create your own custom tab when neither the HHS Reports tab nor the Productivity tab supports a task you must do in Word.

Personalize Your Interface

You use Word every day for specific tasks, perhaps different from anything your coworkers do. So why should you and they have the same set of commands organized in exactly the same way? Why can't your interface be organized in the way that best supports what you do?

Well, it can. Use the following tips to find the best organization of tools and commands for you. Don't be afraid to experiment and share your discoveries with your co-workers.

Change the Order of the Tabs

Word's standard interface puts the **Home** tab first. In this interface we have put the **HHS Reports** tab first. But you can rearrange Microsoft Word's main tabs in any order that suits you. Why not find the order that helps you work as fast and efficiently as possible?

For example, when you work on reports, maybe you spend a lot of time managing references. If so, why should the **References** tab be lost in the middle of the list? Move it into second place, right after **HHS Reports**.

Turn off Tabs You Don't Use

If you never organize mass mailings, you won't ever use the **Mailings** tab. Because you never need it, it's only visual clutter. To make it disappear, go to **Customize**

Ribbon, find it in the list of Main Tabs, and uncheck it. Unchecking a tab does not delete it from Word. It simply hides it. You can always check it to make it visible again when you need it.

Turn on Other Tabs You Need

Perhaps you find macros useful enough that you use, create, and edit them all the time. The commands for that work are on the **Developer** tab, which is not displayed in Word's default interface. Check its box and it will always be there in Word for you.

This organization of the tabs makes my work easier. Your ribbon should be organized to make your work easier for you.

Explore the Commands

Word has many commands that are not displayed on any set of tabs. One or more of them might be customized to do something that you need to do all the time.

On the left side of the Word Options dialog box, change the current selection for "Choose commands from" to "All Commands." Look through the list. Perhaps you will find a few pleasant surprises.

Customizing the HHS Reports Tab

All of the changes you make to the ribbon are saved on your local workstation, so feel free to find and use the commands that work well for you. If there is a command you use a lot, add it to your **HHS Reports** tab.

I use copy and paste very frequently. Often I copy wording from a Web page to paste in my own document. If I paste using the Ctrl and V keys or the **Paste** tool from the **Home** tab, the inserted text will keep the Web page's formatting. To paste just the text—*without the formatting*—I must go to the **Home** tab's **Paste** tool, open its submenu, and choose the **Keep Text Only** option. That's three clicks! Isn't there an easier way?

What if I add **Keep Text Only** to my copy of the HHS Reports tab? To start, I'll choose **Customize the Ribbon...** again. Pasting is not part of any of my current groups and I want my "junk drawer" to stay organized, I'm going to create my own **Clipboard** group:

1. With the **HHS Reports** item selected, I'll select the **New Group** button.
2. I'll **Rename...** that group to **Clipboard**.

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3. As we did earlier, I'll explore the "**All Commands**" list to find **Keep Text Only**. If I press the letter "K", I can skip straight to that part of the list.
 4. Now I'll add **Keep Text Only** option to my **Clipboard** group.
 5. While we're here, I'm going to add another Paste option to this group: **Use Destination Styles**. In a later video, we will show how this option makes it easy to assemble many documents into one report.
 6. Finally, because I use this paste option so frequently, I'm going to make the **Clipboard** group the first item on the tab.

Now I can easily paste anything with just one click, and I won't have to be worried that I'll mess up my document's formatting.

Saving Your Customized Tab

Now that you have Word set up perfectly for you, make sure you never lose your personalized interface. We did this at the beginning of the video, but let's review the steps:

1. Open the Customize Ribbon panel of the Word Options dialog box. To do that, choose **File** from the left end of the ribbon, then **Options** at the bottom of the left column, and then **Customize Ribbon**. Or now that you're becoming a pro at this, right-click on any tab and choose Customize the Ribbon from the context menu.
2. At the lower right corner of the **Customize Ribbon** panel, click **Import/Export**.
3. From the options, choose **Export all customizations**.
4. Navigate to the folder where you would like to save your settings, give the file a name, and click **Save**. Your saved file will have an extension of "exportedUI"—for example, **MyWordInterface.exportedUI**. If you ever need to recover your settings, import that customization file. To share your settings with a coworker, give them the customization file and show them how to import it.

Conclusion

In this video, we've retied the ribbon in Microsoft Word. You've learned how to download, install, and customize the HHS Reports tab. Using this tab, you can prepare reports that follow HHS branding guidelines and meet accessibility standards—and in most cases it will take you less time than the way you prepare reports today.

In the next video of our series, ***Two Panes to Ease Your Pain***, we'll demonstrate a powerful way to set up Microsoft Word's display and show you how to use the tools in the HHS Reports tab. In a later video, ***Templates to Tackle Your Troubles***, we will show how templates can let you focus on the content of your reports rather than the formatting, guidelines, or standards.