TEXAS Health and Human Services
Civil Rights Office

Dashboarding Word: Revealing the Right Tools for the Write Job Right Now - Part 2 - Two Panes to Ease Your Pain

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

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Introduction

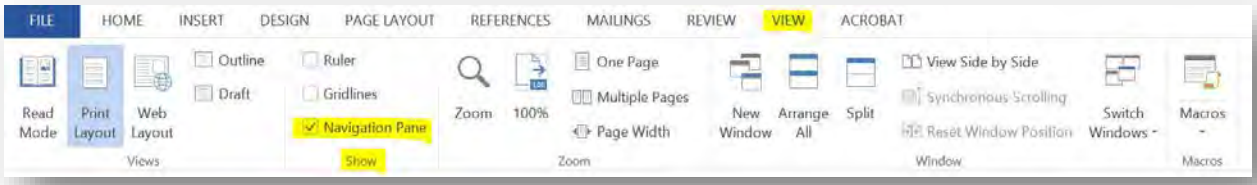
In part one of Dashboarding Word, "The Ribbon Untied", you learned how to download, install, and customize the HHS Reports ribbon. In this segment, "Two Panes to Ease Your Pain," we'll explore using the wasted space on both sides of your document with tools to maximize the ease and efficiency of formatting your documents. Next, in "Templates to Tackle your Troubles" you'll learn how templates can standardize the formatting of all your reports. By using the dashboard and templates together you'll ensure every report you produce follows the HHS branding guidelines and meets accessibility standards.

Setting up a Dashboard

To edit and format a document more easily, you should set up a **dashboard** that consists of the HHS Reports tab and these two panes, the Navigation Pane and the Styles Pane. This dashboard will also help you determine if a Word document is accessible.

If you are using the default ribbon in Word:

- The **Navigation Pane** is opened by clicking the **View tab** and then selecting the **Navigation Pane checkbox** in the **Show group.**

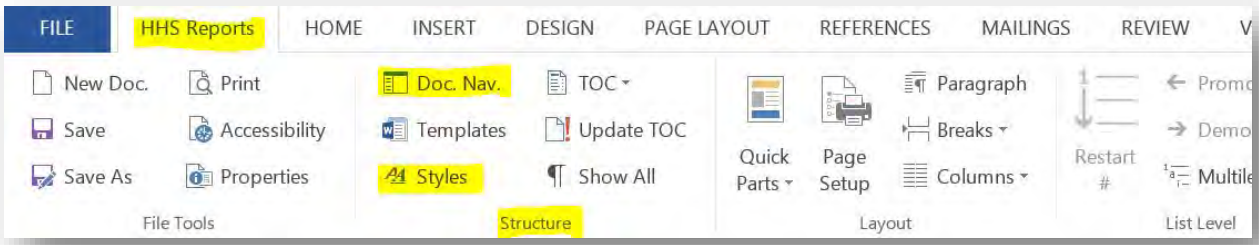


- The **Styles Pane** is opened by clicking the **Home tab** and then selecting the very small **Expand icon** in the **Styles group**.

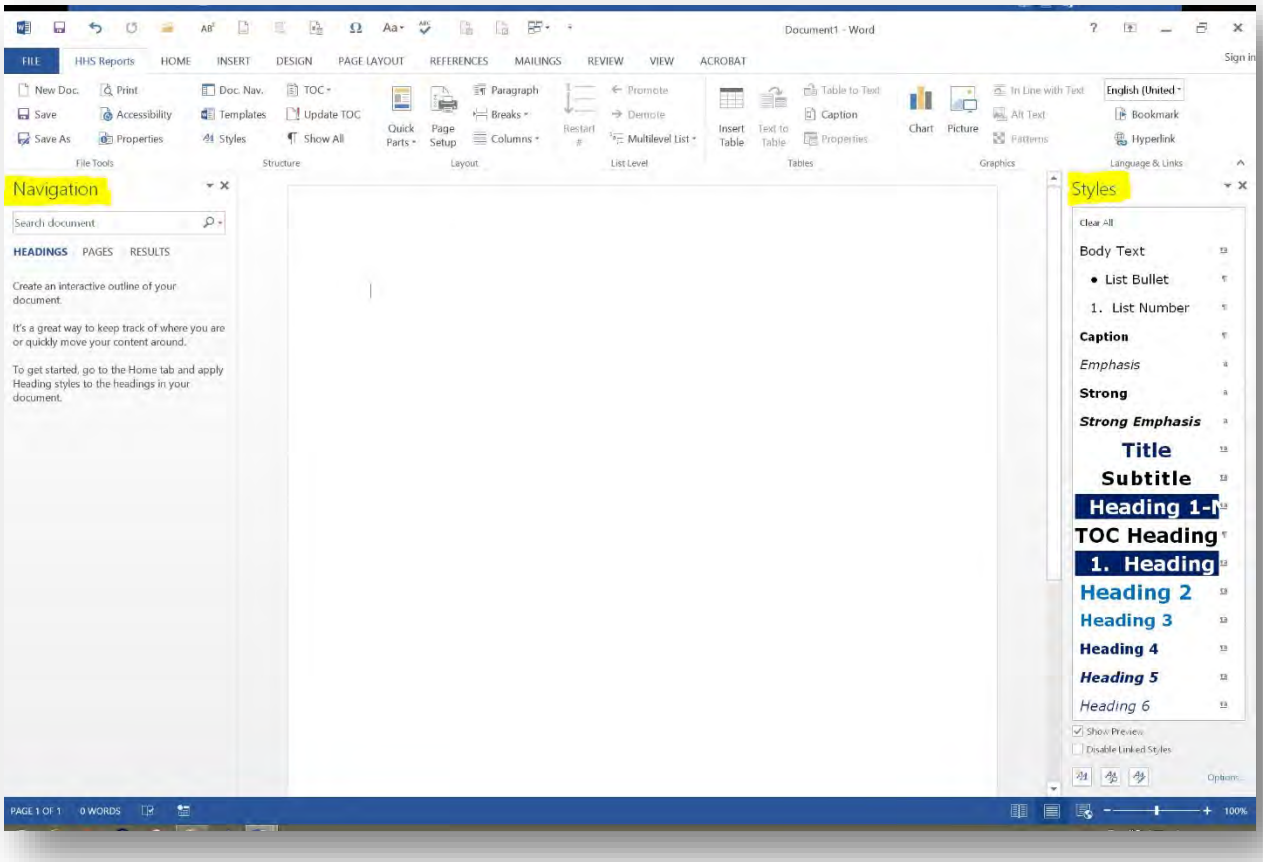
You may remember from "The Ribbon Untied", one of our goals in this training is to increase your efficiency with using Word; so, if you've installed the HHS Reports tab, two simple clicks under this one tab will show you these panes.

If you are using the **HHS Reports tab**:

- The **Navigation Pane** is opened by clicking the **Doc. Nav. command** in the **Structure group**.
- The **Styles Pane** is opened by clicking the **Styles command** in the **Structure group**.



These panes make common formatting tasks and navigation within Microsoft Word easier



Now that we have our dashboard ready to go, let's open an existing HHS Report that is already using the standard HHS Report Template. I'm going to open the Texas Medicaid Drug Donation Study report. Now that we have an example in front of us, let's explore the power behind these two panes.

Document Navigation Pane Overview

The Document Navigation Pane is mainly used to, well, **navigate** the document.

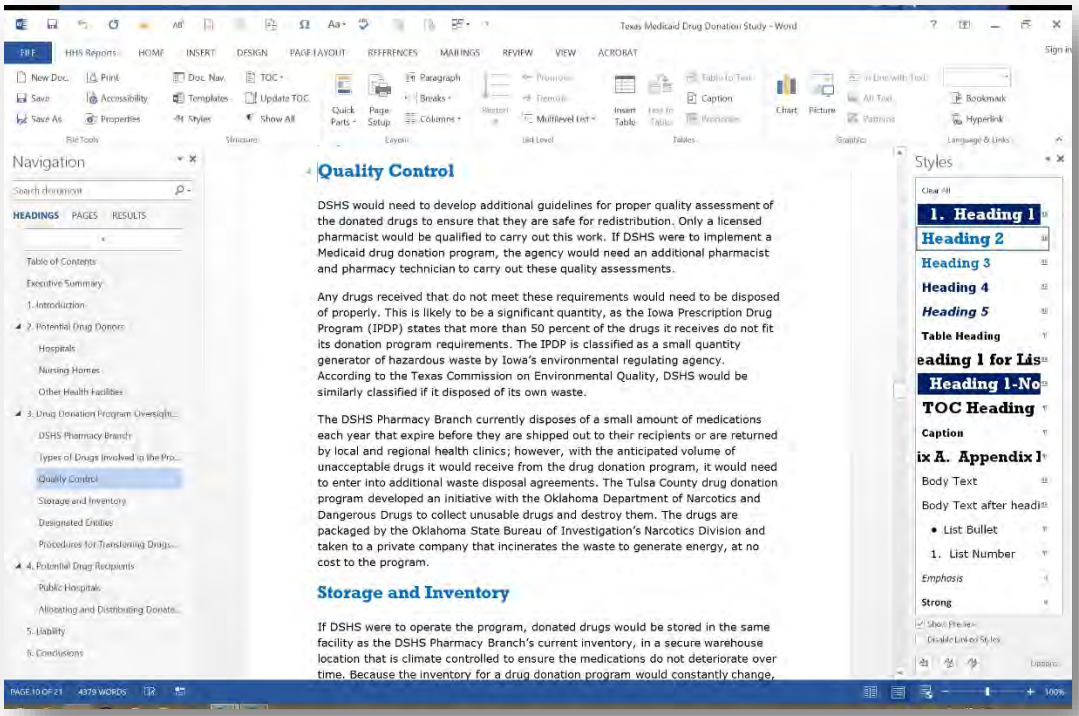
In the **Navigation Pane**, we see that it has three views:

1. The **HEADINGS** view shows a list of **actual** headings in the document. Actual headings add information that lets software recognize the outline structure of the document. So, if the Heading view shows a complete and correct outline of your document:

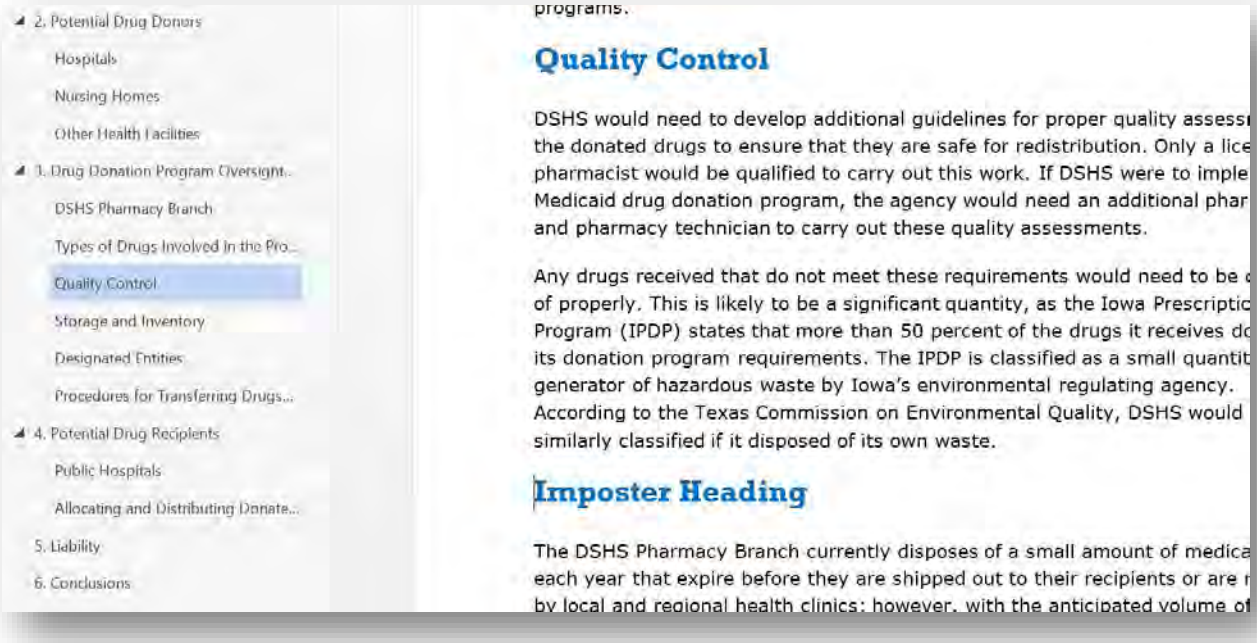
   - Word can also build the Table of Contents for you.
   - Screen readers can build that Table of Contents for their users, even if you don't.

   By using actual headings, you make your document more accessible and more usable for everyone.

   In our example document, we can see all of the headings and subheadings listed in the Navigation pane. If we want to read about the quality control process stated in this report, we simply select the **Quality Control** heading, and the document is scrolled to that selection for viewing and/or editing.



Often, people make text look like a heading without making it an actual heading. If we don't designate the style of the text as a heading, our software, Word or Screen Readers, won't recognize or treat it as a heading. Let's add an **Imposter Heading** to our example document. We'll slip it in here between these two paragraphs. In order to make it look just like our **Heading 2** style, we'll select Quality Control and use the Format Painter tool to format our **Imposter Heading**. (Remember, we are creating a bad example here. Avoid using the formatting tools on the Home tab. These tools will often lead to poor document structure, inconsistent formatting, and ultimately inaccessibility.)



Now, back to our example. Even though it looks just like a **Heading 2**:

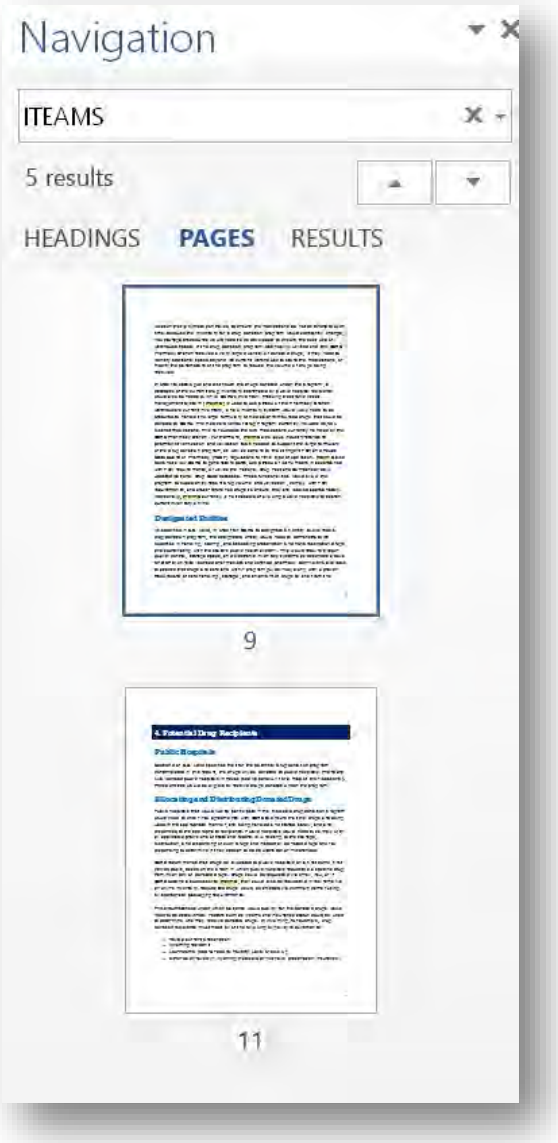
- It won't be displayed in the **Headings** view of the Navigation pane.
- Word will not include it in the generated Table of Contents.
- Screen readers will not list it as a user navigates through the document headings.

Because they look like headings but don't act like headings, we call them imposter headings. Whenever headings in the document don't appear in the Navigation pane, you know that software can't include that heading in the outline structure of the document.

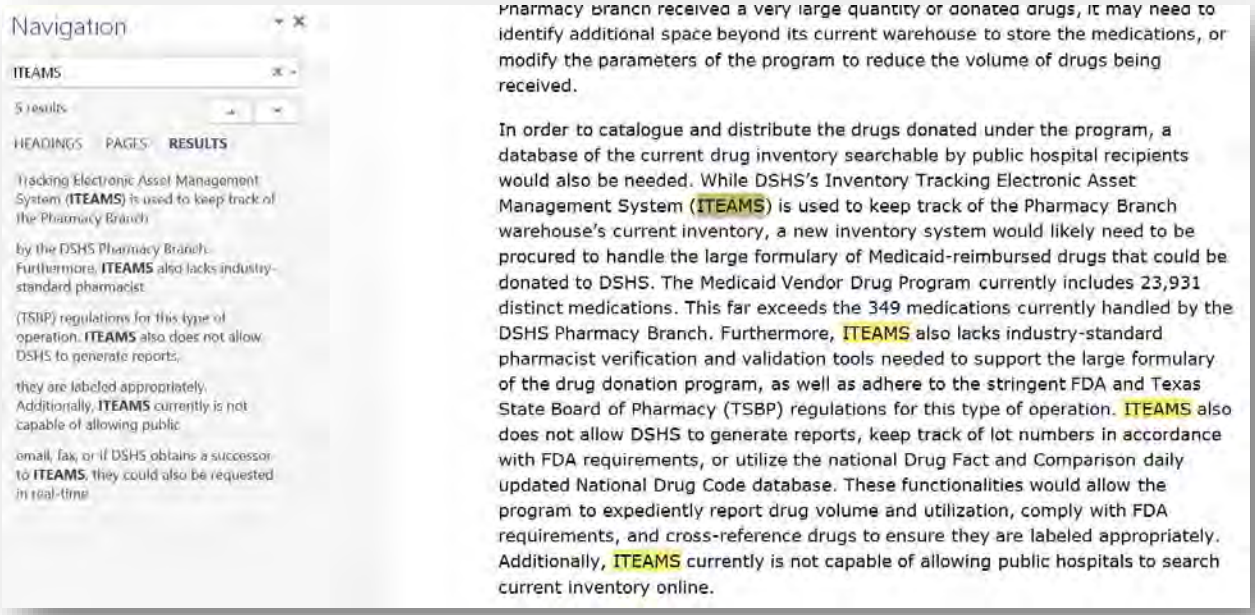
Since we have our dashboard for Word open and ready to go, making our Imposter Heading into an actual Heading is very simple. Just select it and set the style. For this example we'll use Heading 2. Just like magic it appears in our Navigation pane. We can even edit it in our document and our outline is changed in real time.

2. **The PAGES** view shows **thumbnail previews** of each page. These previews can help you find and navigate to pages with phrases, tables, charts, or even graphics. The **PAGES** view is a useful feature when you're searching a document. By entering a word or phrase in the search field, at the top of the Navigation pane, only the pages containing that word or phrase are displayed. If we need to find all the references to the acronym ITEAMS, type

that into the search field. We can easily see that it's on pages 9 and 11.



3. **The RESULTS** view also shows **search results**. It tells how many times the word or phrase appears in the document, and it displays the word or phrase in context by showing a snippet of the surrounding text. You can skim the results, find the instance you're interested in, and select that instance in the RESULTS view to go straight to it in the document.



Another powerful tool the Search entry field offers, is the ability to search for object types in your document. By selecting the drop-down arrow from the search entry field, we can find Graphics, Tables, Equations, Footnotes/Endnotes, and comments. In order for our document to be accessible, all informational graphics should be "In Line with Text" and have "Alt Text" defined. We can use this tool to ensure our graphics are accessible. Let's find our graphics. Now with our HHS Reports tab selected, we can easily see that our graphic is "In Line with Text" because that Graphics tool is highlighted. If it's not highlighted, we can simply select that tool and Word will put that graphic in line with text. We can also select the Alt Text tool to verify or define the Description entry field. We find two graphics in our example document. The first, our logo, is defined in the template as a background object and is not necessary to be deemed as an accessible graphic. The second graphic, our hospitals in Texas map, is important information to all readers of our document. We can quickly see that this graphic is both in line with text and the description is defined. Now that's a very powerful way to ensure accessibility in our documents.

Using the Document Navigation Pane

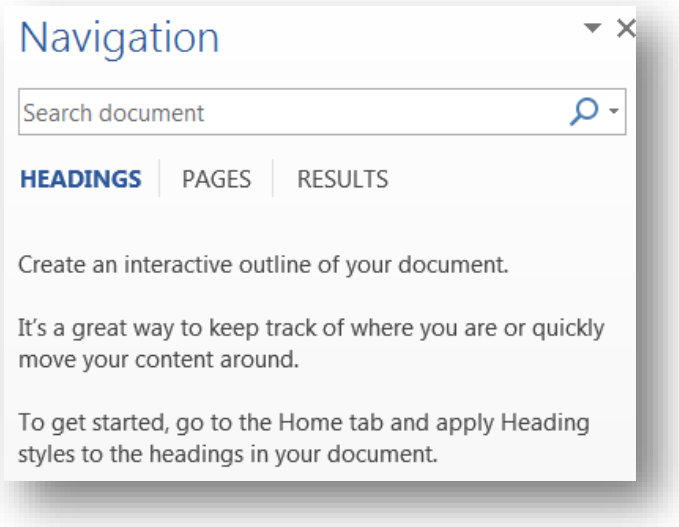
Now that we know the basics of the Document Navigation pane and some of its power, we'll explore more of its functionality.

Let's look at some examples of navigating the document with the Navigation Pane. First, we will examine some headings to see how they play an important role in making a document accessible.

- Select a **heading** in the **Navigation** pane. Instantly, Word moves to that heading in the document. This is a great way to traverse through your document.
- You may also notice that as we scroll through the document, the heading for the current section is highlighted. I use this feature quite often to ensure I remain "on-topic" while writing a document. Whatever I'm typing should pertain to the highlighted heading in the **Navigation** pane.

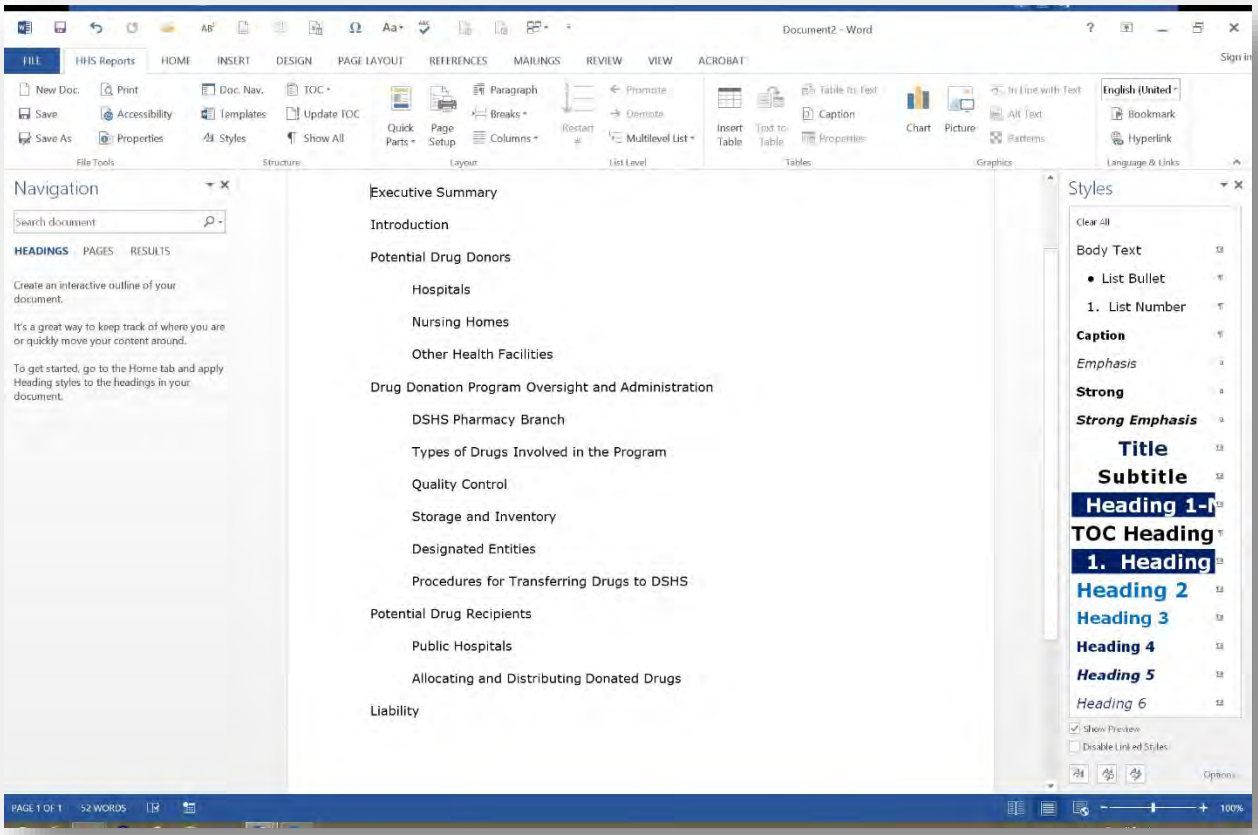
The Navigation Pane can also be used to **DRIVE** the creation of your document and later help **MODIFY** your document. Let's look at a typical scenario:

When we create a new document there are no headings in the Navigation pane. But Word is kind enough to remind us what we learned in elementary school, "Create an interactive outline of your document."

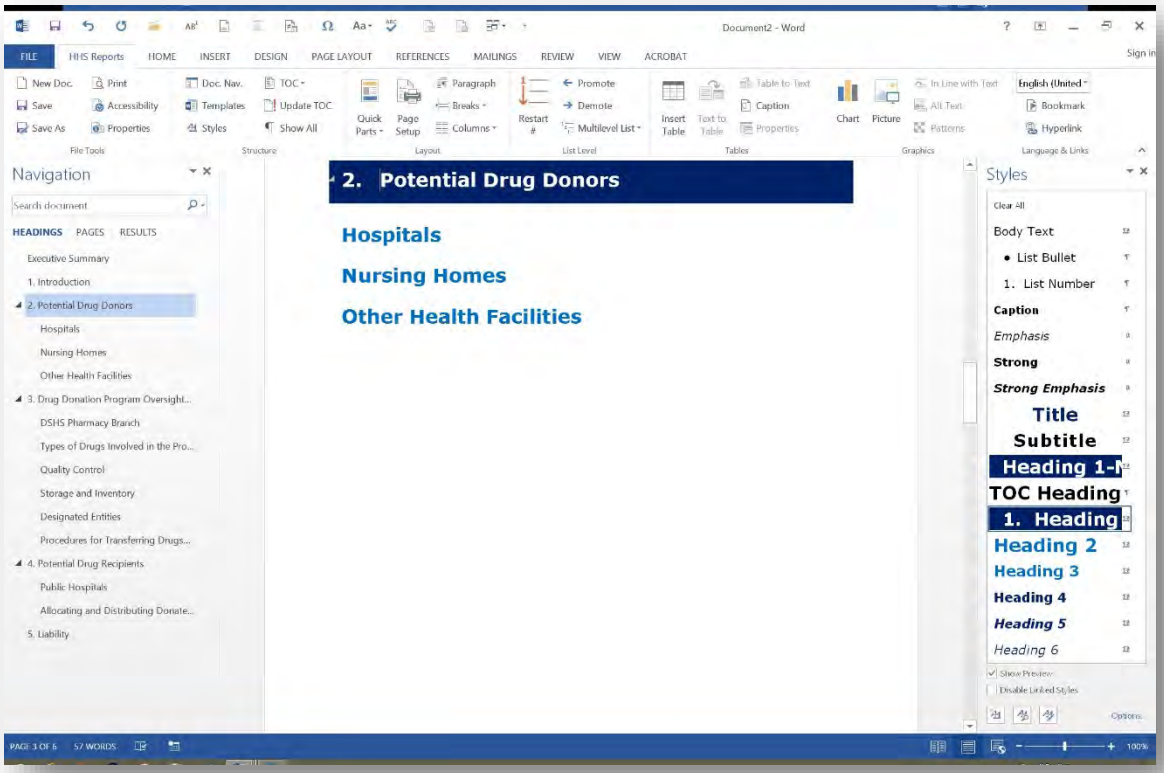


Add Headings to a Document

We should start our document by taking both Word's and Mrs. Abernathy's advice. We'll start by creating an outline. The outline for the example document we looked at earlier probably looked something like this:



Now that we have our outline listed, let's style each topic with the appropriate heading style. Place the cursor at the beginning of the line and select the desired Heading style from the **Styles** pane. Since I'm using the HHS Reports Template styles, I'm going to select the **Heading 1-No Numbering** for the **Executive Summary** style. With the selection of that heading style, that topic is now formatted to the HHS Standard font, color, background, size, and alignment for a **Heading 1**. You may also notice it now appears in our **Navigation** pane. Now I'll make **Introduction** and **Potential Drug Doors** numbered **Heading 1's**. Since the **Hospitals**, **Nursing Homes**, and **Other Health Facilities** topics are all subtopics of **Potential Drug Donors** they should be designated as a **Heading 2** style. I'll simply select all three lines and choose **Heading 2** from my **Styles** pane. Now those topics take on the standard characteristics and they appear in the **Navigation** pane indented under the **Potential Drug Donors** heading. Now I'll finish the remaining headings, and we'll be ready to write our content.



It's best practice to create headings first and then add content between them later. This will help you to see the "big picture" of how topics are related and how you can modify them before you add content to your document.

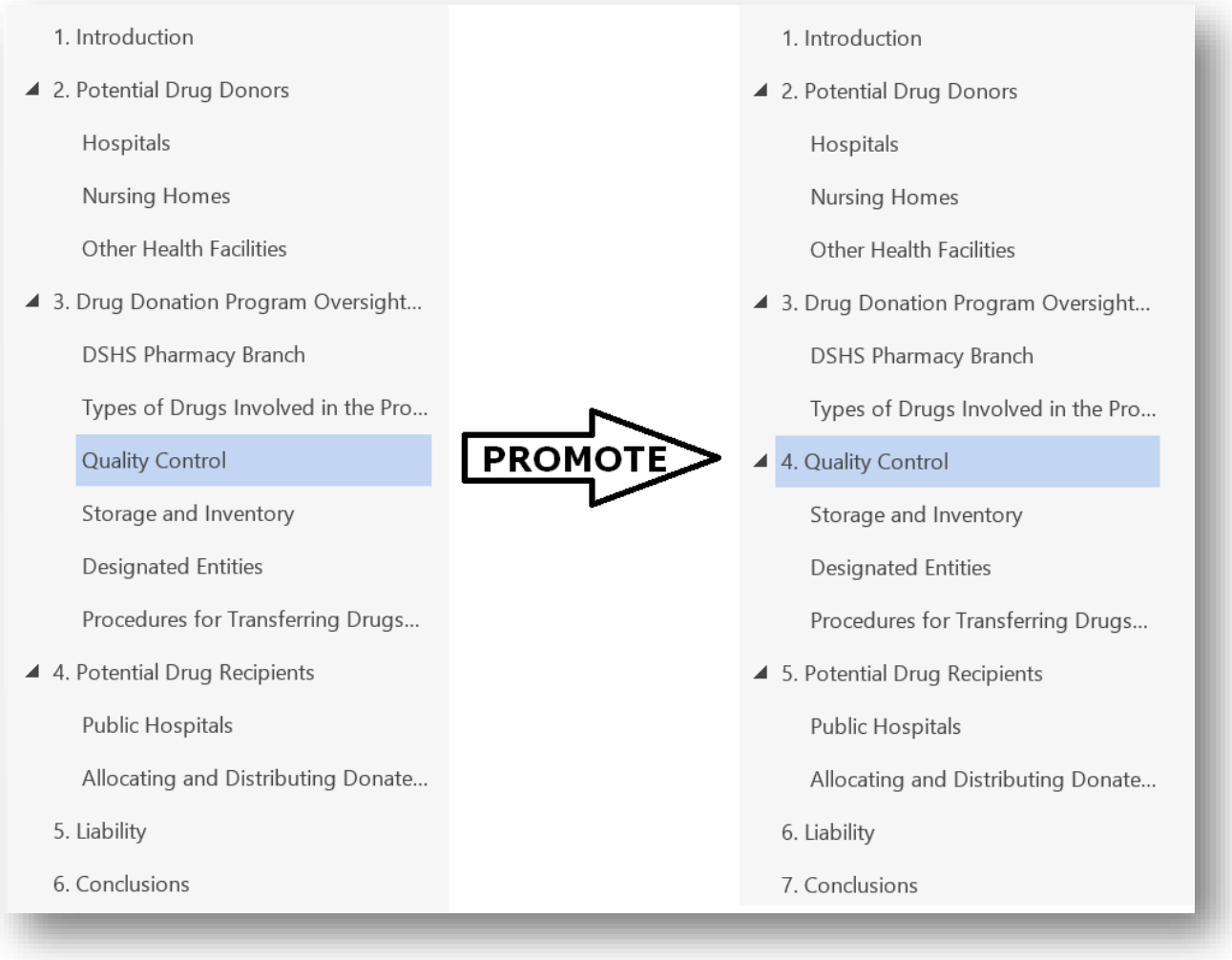
Now, let's return to our example report and continue exploring the powerful features of the **Navigation** pane.

Promote & Demote Headings

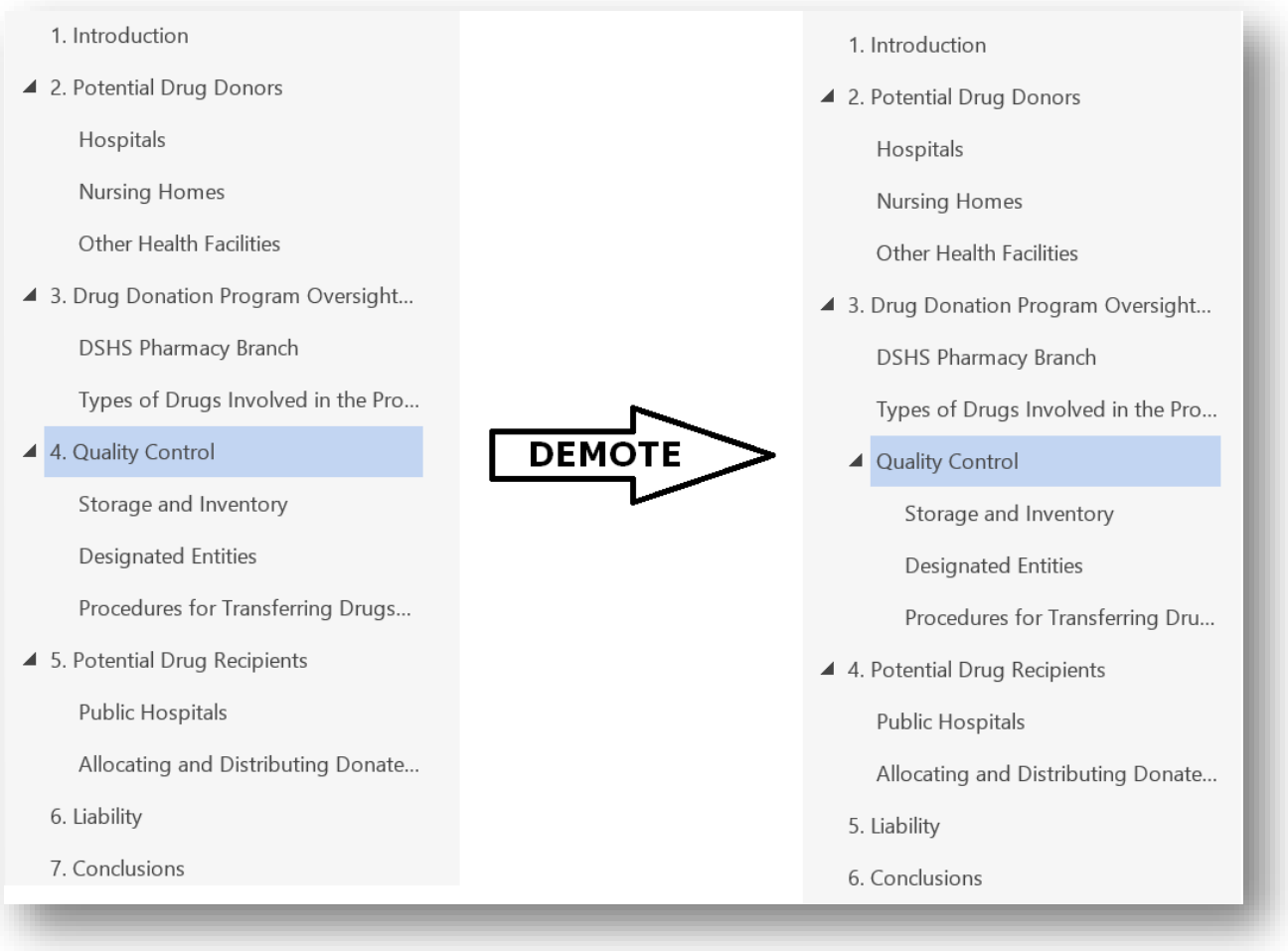
After some careful consideration, I think that it would be better to change some of these headings. Microsoft Word allows you to **PROMOTE** or **DEMOTE** the levels of headings rather easily.

Here, I'll select **Quality Control** in the **Navigation** pane, right-click it, and select **Promote** to promote it to a Heading 1. By selecting the Promote option, the topic took on all of the characteristics of a Heading 1 and it even renumbered all of our Heading 1 topics. Think of all the work we would have done without using the

Navigation pane and Styles. It would've been a real pain.



If a particular topic has subtopics, all of the subtopics will also follow suit with the promotion or demotion. Since we promoted **Quality Control**, it gained three subtopics. Now if we **DEMOTE Quality Control**, it will also **DEMOTE** the three subtopics to a Heading 3.



Since we're on the topic of subtopics, you may have noticed the small triangles denoting heading levels which have other headings **NESTED** under them. By selecting the solid triangles, the subtopics or nested headings will collapse under their parent heading. Adversely, selecting the outlined triangle will expand the main topic so that we can see all the subtopics. This comes in very handy when you're dealing with a very large document.

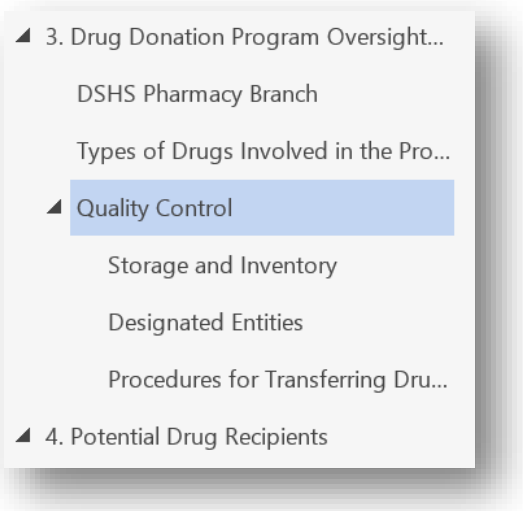


Figure 1: Here we see Quality Control Expanded.

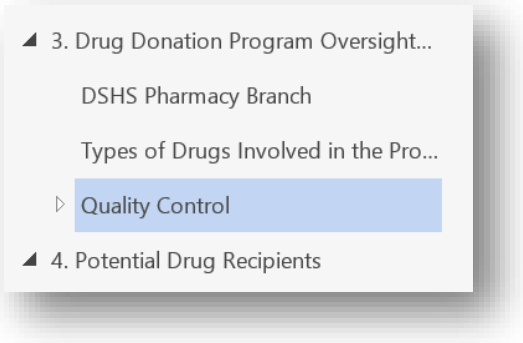
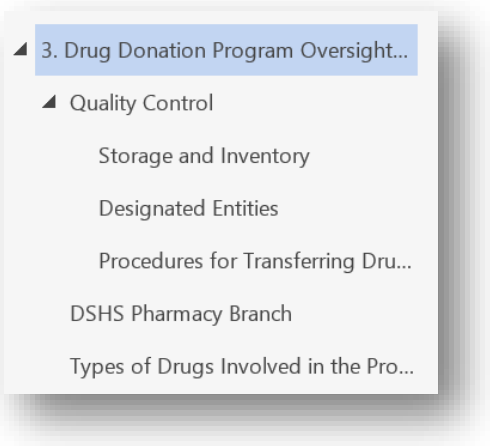


Figure 2: Here we see Quality Control Collapsed.

Move a Heading and its Content

Now that we've **promoted** and then **demoted** the **Quality Control** heading in our example, we may even decide that we need to move that topic up in our document. We can simply drag the Quality Control heading up to the beginning of the Drug Donation Program Oversight and Administration section. Notice as we drag the topic up, all of the subtopics move up with it.



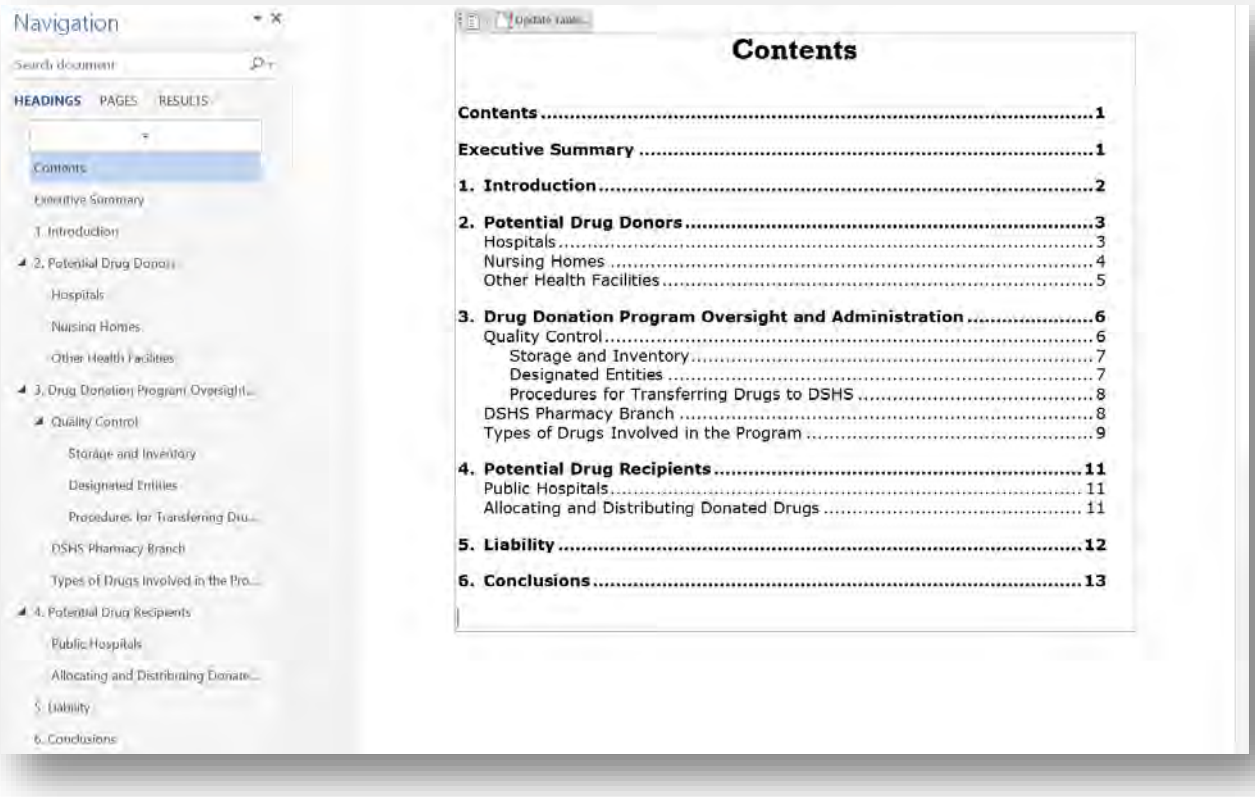
Now we can reorganize our document in seconds. It sure beats having to cut and paste entire sections and losing our place in the report.

Delete a Heading and its Content

There are times, after writing our document, we decide that a topic we added in our original outline doesn't belong in our report after all. By right-clicking on a heading, we can choose **Delete** from the context menu that opens. This delete function will delete the heading, the content under the heading, and all of its sub-headings as well. It's a great tool to use when you need to trim down your document, but use it carefully. And remember, **Undo** is our friend.

Create TOC from Heading Levels

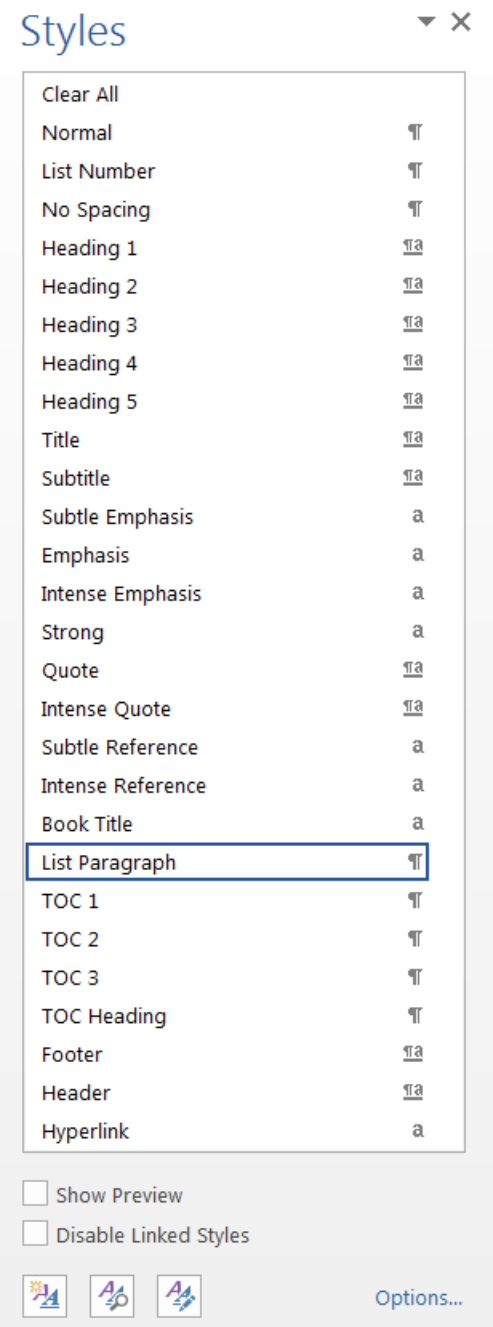
An advantage to formatting and viewing all your headings in the Document Navigation pane is that you can see how Word will create your document's Table of Contents. If we place our cursor at the beginning of the document and choose the Automatic Table 1 from the TOC tool on the HHS Reports tab, Word will create our Table of Contents based on the headings in the Navigation pane.



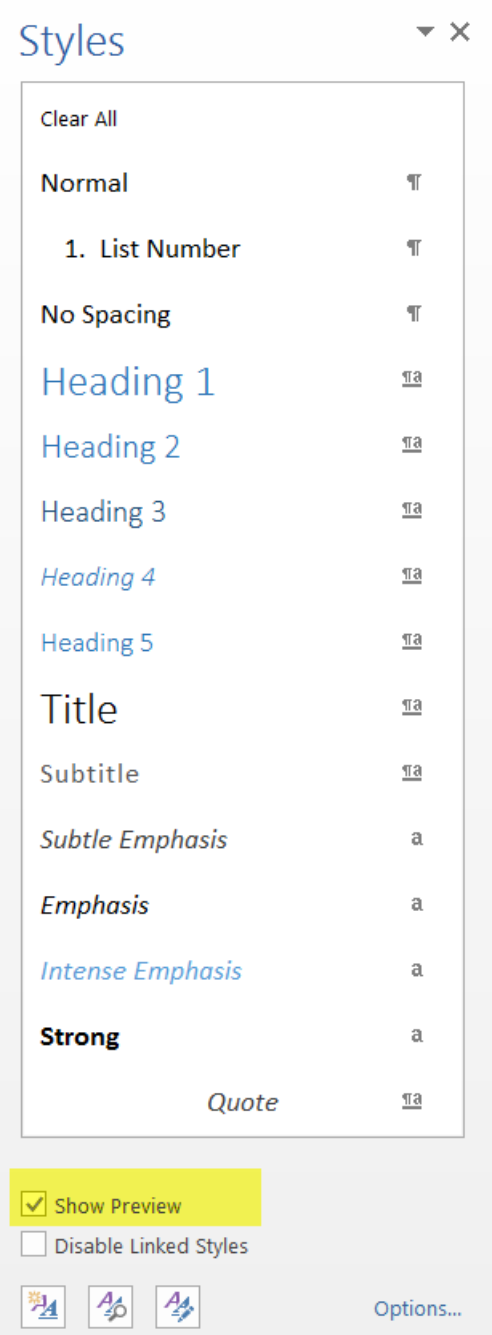
Wow! Check out that resemblance. Now you can see how important the Navigation pane is to your document creation process. It's like having the table of contents, your document's roadmap, visible at all times.

Styles Pane Overview

In the **Styles Pane**, its default view shows the style names and elements that can be applied to your document, such as block level elements like entire paragraphs, line level elements such as titles and heading, and even character level formatting to draw attention to single words or phrases. Styles not only help us define our navigational elements like headings, they keep our document formatting consistent throughout the document. Whether it's a word we want to emphasize by making it **Strong** or an *Intense Quote* that we really want to standout, styles are the key to formatting your document.



If you click the **Show Preview** checkbox, each style will display the **ACTUAL** formatting that will be APPLIED to structural elements in the document. This is very helpful for anyone that is a first time user of styles. It allows you to see what you're going to get before choosing that style.



Styles represent **ROLES** for both **structure** and **format** for specific structural elements (e.g., headings, bullet or number lists, and paragraphs) in a document. When used properly, styles can enhance the readability and the accessibility of a Word document.

Using the Styles Pane

As mentioned earlier, the Styles pane can be used to **PREVIEW** and **APPLY** available styles to elements in your document. Setting your text to a particular style is very easy. Highlight the text that you would like to style and select that style from the **Styles** pane. If selecting a line structured style, the cursor can be placed anywhere on that line and that entire line will take on that style. I prefer selecting my text and selecting its style. After all, Cornelius says it best:

> *Whatever is selected gets effected.*

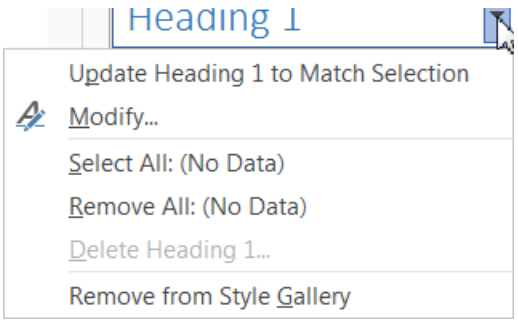
Making Your Own Style

We've already learned the power behind the Navigation pane. Styles also have their own super powers. Ensure that everything in your document has a style. Resist the urge to change a block of text by using the tools on the left of the **Home** tab. Rather than making a word bold with the bold tool, change the **style** of that word to **Strong**, or create a **Bold** style.

Let's create a hypothetical example using our Medicaid Drug Donation Study report. We want our reader to know the importance of our organization in the Quality Control section. In this case it's DSHS. Using our Navigation pane powers we learned earlier, we can find all references to DSHS. In that section we'll go through each result and change the style to Strong. Now DSHS in this document section has taken on a styled role.

If you hover over the right side of a style in the Styles pane and click on the down arrow, you will be able to:

1. Update the look of a style based on the format of your selected text.
2. Modify an existing style.
3. Select or remove all instances of styles in the document.
4. Delete a style.



If we want to change a particular style we can change that style once and everything assuming that role will change. Let's not only make our **Strong** style Bold. Let's make it big. Choose "Modify…" from the **Strong** style menu. Let's make the font size 20. Now everything in our document using the Strong style is big and bold.

Once styles are assigned, changing the way they look is relatively easy and can be done for various reasons. Users with low vision may set their styles larger. Since styles can be inherited, setting the Normal style to a larger size will increase the size of all the other styles that are based off of Normal. Other people with low vision also like to underline headings; so that when the screen is magnified headings can be recognized even if the words aren't on the screen. HHS has a set of styles defined to ensure consistency across organizations under the HHS umbrella. We'll show you how to use these styles in the next video, "Templates to Tackle Your Troubles."

Conclusion

In this video, you learned how to use the Document Navigation and Styles panes and how they can help you determine if a document has the proper structure and styles. When headings and styles are used properly in a document, it will be easier to navigate for everyone. A well-structured document will also be more accessible to people using assistive technology (AT) such as screen readers.