



# Dashboarding Word: Revealing the Right Tools for the Write Job Right Now - Part 3 - Templates to Tackle Your Troubles

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*Presented by the Civil Rights Office of the Texas Health  
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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. Then, in part two, “Two Panes to Ease Your Pain,” you learned how to take advantage of the wasted space

on both sides of your document by using the navigation pane and the styles pane. Now that you’ve learned how to setup and use the powerful Word dashboard, you’re

going to discover how templates and themes can standardize the formatting of all your reports. By using the dashboard, templates, and themes together you'll ensure every report you produce follows the HHS branding guidelines and meets accessibility standards.

## Scenario 1 - On Your Own

In order to experience the effect templates can have on your documents, we'll go through a couple of scenarios. In our first scenario we'll assume that we're experts at writing documents and using styles to format them. We'll also assume that you are the only contributor to the creation of this document. In another video we'll focus on combining contributions from multiple team members. Let's begin by reopening the Texas Medicaid Drug Donation Study report. This document has proper structure. It has headings, bullet lists, and paragraph styles. **BUT** it uses the MS default Normal Template instead of the HHS Reports Template. So, right now, it's fairly accessible, but without the HHS Reports Template loaded it doesn't match the HHS branding guidelines. The HHS branding guidelines not only help by ensuring consistency of documents across departments it also increases the accessibility of your document by using larger font sizes, weights, color contrast, and a whole lot more.

## Download the HHSC Word Template

If you don't already have the HHS Word Template, you can download it from the HHS Extranet. Before we download the template, we need to find out where Word is storing our templates.

1. In Microsoft Word, select the "FILE" tab.
2. Select "Options" from the File Menu.
3. Select "Advanced" from the Word Options menu.
4. Select the "File Locations..." button toward the bottom of the Advanced Word Options.
5. From this list select the "User Templates" file type.
6. Click the "Modify..." button.
7. In the Modify Location window, right click on the address entry field at the top of the window and select "Copy".
8. Since we only want to find the templates location and not actually modify it, we'll select the "Cancel" button.
9. Now close the File Locations window by selecting the "Close" button.
10. Finally, cancel out of the Word Options window by clicking the "Cancel" button.

Now we're ready to download the HHS Word Template file.

1. I'm going to use Internet Explorer so that I'm prompted for a file save location later.

2. Now we need to open the HHS Connection page. It's probably already set as your homepage. But in case it's not your home page, go to [hhsconnection.hhs.texas.gov](http://hhsconnection.hhs.texas.gov).
3. Select the Communications Services link or icon.
4. Now under the Communications Services section select Templates.
5. Scroll to the bottom of the Templates page. Just before the footer of the page three file links are available.
  - a. HHS Word Template – Basic Instructions (MS Word)
  - b. HHS Word Template – Full Instructions (MS Word)
  - c. HHS Word Template – No Instructions (MS Word)
6. Feel free to download the Full Instructions template and open it as you would any other Word document to read about writing your first document using this template. The full instructions will present a lot of details on maximizing the use of templates.
7. Since our document in this scenario is already complete, we're going to download the "HHS Word Template - No Instructions" template.
8. If you're using Internet Explorer, you'll be prompted, "What do you want to do with HHS-Template-for-Reports-No-Instructions.dotx?" Choose the "Save as" option.
9. Since we copied the templates location before we opened our browser, we can paste this location in the address field by right clicking in the address field and selecting "Paste" and then press Enter on the keyboard.
10. You should see that you're in a Templates directory.
11. Now simply click the "Save" button, and the HHS Template will be ready to use.

## Attach a Template to a Document

A **template** is a collection of styles and custom content suited to a specific kind of document. The HHS Reports template is customized for the task of creating a report.

In this case, our report has already been created using the styles that come with Word. By attaching our custom template to the draft report, we can change the appearance of every bit of text that is formatted with a style. Now it looks like any Word document. When we're done, in a matter of a few seconds, it will look like the body of an HHS report. That's pretty amazing if I do say so myself.

1. In the HHS Reports tab's Structure group, **click the Templates command**. The Templates and Add-ins dialog box opens. Under Document template, you should see "**Normal.**" Normal is the default Microsoft template. Whenever you think you've created a document using no template, you have actually been using Normal.
2. To find the new template, **click the Attach... button** and **navigate to select the template** you want to attach. In our case, it's the **HHS Template for**

**Reports No Instructions.** Once you've selected it, **click the Open button.**

The entry under Document template has changed to HHS Template for Reports No Instructions.

3. This step is very important: Below the Document Template field, select the **Automatically update document style checkbox** and then **click the OK button.**

The headings and text in the document now look like an HHS Report. Save your document.

One feature of an HHS Report is that the main headings are numbered. In the HHS Reports template, this numbering is built into the style we use for main headings, which is Heading 1.

But something is wrong here. The executive summary is numbered "1" even though it isn't part of the report itself. Let's fix that.

Look at the Styles panel. In addition to Heading 1, which is numbered, there is a new style that doesn't exist in the Normal template called **Heading 1 - No Numbering**. Except that it isn't numbered, it looks just like a Heading 1. Make sure the cursor is in the heading for the executive summary. Then click **Heading 1 - No Numbering**. The number is gone!

Now look in the Navigation panel. "Introduction" used to be numbered 2, and now it's 1. All the other main headings got renumbered, too.

One of the hassles of creating a report is to get the numbering of sections to work. In our HHS Reports template, you don't have to worry about that. The numbering is built into the heading style.

Another vexing problem with reports is getting bullets in lists to behave. Bullets that should be the same can be just different enough to annoy the people who matter. To make bullets consistent in all our reports, we assign them through a style: List Bullet.

**Find each bulleted list in the document. Select all the items in a list** and then **click the List Bullet style** in the Styles pane.

Notice that the bullet characters change. If you use the List Bullet style even when you're working with the Normal template, this change will happen automatically when you attach the HHS Reports template to your document.

## Add Additional Pre-Formatted Contents to the Document with Ease

Let's turn our attention to adding additional content to this document to see how it gets affected by the presence of a new template.

### Add Document Properties

1. In the File Tools Group, **select the Properties command**.
2. In the Document Properties panel that appears, add or modify the Author, which should be the agency name. In this case the author is the Department of State Health Services.
3. The Title field is simply the title of the document. It may or may not be the same as the name of your Word file. The Title field is important to us because it's used by Assistive Technology, like JAWS, to announce the name of the document to a user. In this case the title of the document is "Texas Medicaid Drug Donation Study". Once the property information is entered, click the small "x" in the Document Panel to save the information and close it.

### Add Table of Contents (TOC) with Quick Parts

Quick Parts is a feature in Word that makes it easy to add standard features to all your documents. Quick Parts are saved in a template. Our HHS Template includes quick parts that are standard components of our reports: a cover, a table of contents, and more. Let's add a Table of Contents:

1. In the Layout Group, **click Quick Parts** and **scroll to the HHS TOC Quick Part**, and then
2. **Right-click and select Insert at the Beginning of Document** from the menu

**CAUTION:** Make sure you right-click, **NOT** just click, on the Quick Part. Right-clicking gives you the choice of where to insert the Quick Part. Clicking inserts the Quick Part right where the cursor happens to be.

Notice how the Table of Content was created based on the Heading 1 and Heading 2 levels in the document. Notice also that a Page Break was also added for you to force the heading to the next page.

### Add A Cover with Quick Part

Now, let's add a cover also using a Quick Part.

1. **Click the Quick Part command** again but this **time right-click Cover Lege Report** and **select "Insert at Beginning of document"**.

2. Then, **make the following edits:**

- a. Title
- b. Legislative Reference
- c. Agency Name
- d. Date

## Add A Theme

To make our documents more adaptable, we use a theme to set the HHS brand colors and fonts. In Microsoft Word, Excel, and PowerPoint, a theme is a tool for designating three features of your document:

- The font to be used for headings.
- The font to be used for the body of the document.
- A color scheme—in our case, the HHS Brand colors.

By using a theme, we make it possible for people who need different fonts or colors to adjust our documents to their needs. All they have to do is change the theme.

This report is using the standard theme Microsoft offers: Office. Let's change it to a theme built just for HHS reports:

1. **Click the Design tab and then click the Themes drop-down menu.**
2. **Select the HHS Report theme** from the drop-down menu Notice how both the fonts and the color scheme have changed:

**Before, we had Microsoft's favorite heading font on a black background:**

**After, we have the heading font for HHS Reports—that is, Rockwell— on a deep blue background:**

If you don't see the HHS Reports Theme in your theme choices, call the help desk, and they can help you install it on your computer.

## Save as PDF File

After the document has been **structured** correctly, the last step to take, if you need to convert it to a PDF file, is to save it as a PDF document. Since this document has only text, it should convert to a PDF format with little to no remediation for accessibility.

1. Save your current document.
2. Then, **Click File > Save As** from the menu.
3. In the Save As dialog box that appears, **select PDF from the Save As Type dialog box.**
4. **Click the Options... button** at the bottom of the dialog box.

5. In the Options dialog box that appears, **select the following options** in the Include non-printing information section:
  - a. **Create bookmarks using:** (checkbox)
    - i. **Headings** (radio button)
  - b. **Document properties** (checkbox)
  - c. Document Structure tags for accessibility (checkbox)
6. **Click the OK button.**

The document will be saved in the same folder as the Word document with the same name but with the “pdf” extension.

## Conclusion

In this video, you learned how to use templates and themes to standardize the formatting of all your reports. By using the dashboard, templates, and themes together you’ll ensure every report you produce follows the HHS branding guidelines and is well-structured. Always remember that a well-structured document is easier for everyone to read and will also be more accessible to people using assistive technology (AT) such as screen readers and other devices.