



Dashboarding Word: Revealing the Right Tools for the Write Job Right Now - Part 4 - Templates to Tackle Team Troubles

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

Table of Contents

Introduction	2
Your Document.....	3
Your Colleague’s Document	3
Use the Template Command to See Which Template Is in Use	4
Use the Navigation Pane to Check the Outline Structure.....	4
Use the Styles Pane to Check the Style of Each Paragraph.....	4
Turning Two Documents into One.....	5
Check for the Right Theme	6
What to Do when Pasted Content Doesn’t Pick up the New Theme.....	6
Fixing the Formatting when Word Goofs.....	7
Update the Table of Contents	7
Tackling Your Team Troubles	8
Conclusion	9

Introduction

In our first scenario, you worked with one document prepared by one author using Word's Normal template. You learned these main points:

- Every document is built with a template. Usually, that template is Microsoft's Normal template.
- In a template, we use styles to control the appearance and behavior of text.
- Each style represents a role, so by assigning a style to a paragraph or phrase, you are telling Word to make it look and behave as defined in that role. For example:
 - ▶ Text with the style of List Bullet should *look* like an item in a bulleted list.
 - ▶ Text that has a heading style should *behave* like a heading:
 - ◇ It should appear in Word's outline of the document.
 - ◇ Word should be able to add it to the table of contents automatically.
 - ◇ It should stay on the same page as the paragraph that follows it.
- If an author has used the styles of the Normal template as we mean for them to be used in an HHS Report, we can make their document look the way it should by attaching the HHS Reports template to it—although the fonts and color scheme might still be wrong.
- To fix the fonts and color scheme of the report, you switch its theme to HHS Reports.
- When you use styles and the HHS Reports theme properly, your documents will generally be accessible.

This tutorial covers a different scenario: you and a colleague are working together to produce one report. Here's what we hope you will learn:

- In Word, any author can create their own template to suit their own needs.
- No matter what another author's template makes their documents look like, if the author uses the same styles used in the HHS Reports template, making it look right when you paste it into your document, which uses the HHS Reports template, is as easy as 1-2-3:
 1. Copy all of that author's document.
 - ◇ This is easily done from the Home tab by selecting the "Select All" tool.
 - ◇ Then selecting the "Copy" tool.
 2. Paste it into your document.
 3. Check for glitches in the formatting of the pasted content. If you find any, try reapplying the correct style to the affected content.

For this tutorial, we will work with the same report we used in Templates to Tackle Your Troubles.

Ready? Let's begin.

Your Document

As your part of the team effort:

- You produced all but the last three chapters of the report.
- You created the document in the HHS Reports template.
- You applied the correct style to each block of text according to its role in the document.
- You even added the table of contents and cover to your report.

Let's review the results of your work:

- When you inserted the table of contents, Word produced a complete and correct set of headings. Each heading shown in the table of contents links to its respective location in the document.
- In the Navigation pane, you also see the complete and correct outline of your document.
- Every paragraph appears as it should in a standard HHS report:
 - ▶ Heading 1 has a dark blue background.
 - ▶ Heading 2 is a medium blue—the HHS Branding blue for accent colors.
 - ▶ The font used for headings is Rockwell.
 - ▶ The font in the body of the document is Verdana.

You've just returned from lunch. In your inbox, you see an email from your colleague, Verdana de Spizer, with the last three chapters of the report attached. You're a bit nervous, because you have until close of business to send the perfectly formatted report to your supervisor for their approval.

Your Colleague's Document

As you might guess, Verdana de Spizer wishes we were still using Times New Roman for the body of documents and Arial for headings. To reduce her frustration with the issue, she uses Arial, Times New Roman, wider margins, and her favorite color scheme that she finds more appealing to create her documents. She usually uses the correct template to fix the appearance before sharing her documents. Except this time, she forgot. Her three chapters have the wrong fonts, margins, and color schemes:

Not only that, but Verdana is out for the rest of the day. What do you do?

First thing is don't panic. Ask yourself three questions about Verdana's part of the report:

- What template did Verdana use?
- Does her document have the right outline structure?

-
- Did she use the right styles?

To answer these questions, we use three commands in the Structure group of the HHS Reports tab:

- Templates
- Doc Nav (for Navigation)
- Styles

Any time you start adding one document to another, use these steps to figure out whether you should expect problems and, if so, what problems to watch for.

Use the Template Command to See Which Template Is in Use

Click the Templates command. The Templates and Add-ins dialog box opens: Verdana is using a template called TNR4ever.dotx. Based on our first glance at Verdana's document, this name seems appropriate—she will forever remain true to Times New Roman.

Use the Navigation Pane to Check the Outline Structure

Returning to the Structure group of the HHS Reports tab, **click the Doc Nav. Command** to open the Navigation pane:

There is an outline! Why don't we scroll through the document to be sure the outline is complete? Let's do it the fast way:

1. In the Navigation pane, click PAGES to switch to the Pages view:
2. In the Pages view, the Navigation Pane displays a thumbnail image of each page: And in those thumbnails we can see that there are three Heading 1s (in green and numbered) and two Heading 2s—exactly what we saw in the Headings view of the Navigation pane.

Use the Styles Pane to Check the Style of Each Paragraph

Looking back at the Pages view, there are only four roles present:

- Heading 1
- Heading 2
- Body Text
- A bulleted list

Did Verdana use the right style for each of those roles?

-
1. If the Styles pane isn't already open, let's open it. In the Structure group, **click Styles:**

With the cursor in the first heading of Verdana's document, we can see that its style is Heading 1. It's the heading of a chapter or main section in our report, so that's correct.

2. **Click the next heading: Public Hospitals.** Now look at the Styles pane again: In the Navigation pane, "Public Hospitals" is indented one level. The Styles pane shows that its style is Heading 2. That's correct.
3. The paragraph below "Public Hospitals" is body text, so it would make sense for its style to be Body Text. And it is: Did you notice the style below Body Text? Its name is Body Text after heading. Because this particular paragraph is right after a heading, you might want to use that style instead: Body Text after heading has just a little less space above it—so the heading looks like it is closely related to the text that follows. This is a fine point of formatting. If you decide to use this style in your report, apply it to each paragraph that is immediately after a heading. If this style was used in the rest of your report, you should use it in the same way in Verdana's document. You might want to leave this paragraph in Body Text and check that point after you have merged the documents.
4. Continue through the document, checking at least one example of each role of text to ensure that Verdana used the correct style. At the bottom of the first page, there is a list—a list with an arrowhead in front of each item:

How odd. This should be a bulleted list. Let's check the style that is in use:

List Bullet. In spite of the special character Verdana chooses to use, this is the right style for this role. It should be fine.

If you are satisfied that the other paragraphs are all using the correct style, we are done. We're ready to add Verdana's content to your part of the report.

Turning Two Documents into One

If we wanted to, we could attach the HHS Reports template to Verdana's document now. That would be fine. But because your contribution is already in the HHS Reports template, we can take a simpler approach: Copy and Paste:

1. In Verdana's document, **press CTRL+A** to select all of the text.
2. To copy, **press CTRL+C**.
3. If your document is not open, open it. In the Navigation pane, **Click the last heading—"Procedures for Transferring Drugs to DSHS."**

4.

At the end of the last paragraph in your document, press Enter (to add an empty paragraph).

5. **Press CTRL+V.** Verdana's content will now appear at the end of your document.

If Word were perfect, we would be done. Unfortunately, Word is, well, Word. Verdana's content might look perfect in your document, but Word sometimes fails to check for the right theme.

Check for the Right Theme

When you paste content from one document into another, Word's standard settings determines the new content and uses the theme of the document you paste it into. So now that you've pasted Verdana's content into your part of the report, it should have all the features of the HHS Reports theme:

- The font used for headings should be Rockwell.
- The background of Heading 1 should be dark blue.
- Heading 2 should be a medium blue.
- The font used for the body of the document should be Verdana.

Is that what you see? If so, get up and stretch or take a nap while we tell other people how to fix their problem.

What to Do when Pasted Content Doesn't Pick up the New Theme

If Verdana's content did not pick up the HHS Reports theme after you pasted it into your draft report, you may have customized your preferences for pasting text. But it's still easy to get the right result. Here's what to do:

1. To undo your paste, press CTRL + Z.
2. At the very end of your document, press "Enter" to add a new paragraph.
3. Right-click in that new paragraph.
4. In the context menu, choose the first option shown for Paste: Use Destination Theme.

Now the content from Verdana's document will have the format it should: the styles of the HHS Reports template, fonts, and color scheme of the HHS Reports theme.

Fixing the Formatting when Word Goofs

Sometimes Word makes a mistake in applying the destination styles and formatting to pasted content. For example, when you paste a numbered list into a document that already contains a numbered list, Word doesn't always understand how the lists are related. In this report, Word could make either of these mistakes:

- It might keep the Heading 1s in the pasted content in a separate list from the Heading 1s in the other document. For example, instead of changing from 1-2-3 to 4-5-6, the numbering on the Heading 1s in the pasted content might remain 1-2-3.
- Word might even lose the numbering on the Heading 1s in the pasted content. You'll end up with no numbering on the last three headings in your report.

Fortunately, both of these problems are easy to fix:

1. In the Styles pane, right-click on Heading 1.
2. Choose Select All.
3. Click Clear All. All your Heading 1s will change to plain text with no numbering—but they will still be selected.
4. Click Heading 1 again. Problem solved!

The same general approach—reapplying the style to the pasted content in the new document—can fix many problems that can arise when Word does not correctly apply the new document's formatting to that style in the pasted content.

Update the Table of Contents

In this example, you inserted the cover page and table of contents into your portion of the report before you received Verdana de Spizer's contribution. So the current table of contents is complete and correct for your portion of the report:

Although the Navigation pane and table of contents have similar features, there are some important differences:

- The Navigation pane updates dynamically as you add or remove a heading, as well as whenever you change the outline level of a heading. The table of contents does not.
- The Navigation pane shows the same outline that a screen reader or other software can retrieve from the Word document. No matter what the table of contents displays, the Navigation pane is the outline other programs will produce on their users' request.

That said, we need for the table of contents to be complete and correct. Now that the document is assembled and in the correct template, there are several ways to fix it:

1. Activate the Update Table of Contents dialog one of these ways:
 - a. In the Structure group of the HHS Reports tab, click the Update TOC command. (This works no matter where the cursor is in the document.)
 - b. With the cursor in the table of contents, press F9.
 - c. With the cursor in the table of contents, right-click. In the context menu that opens, click Update Field.
2. In the Update Table of Contents dialog box, choose Update entire table:

You're done! Your completed report is now ready to submit for your supervisor to review.

Tackling Your Team Troubles

Verdana turned in a document that didn't look like our standard at all, but she used a template and she used the right style for each role. So to add her contribution to your report, we could:

1. Select all and copy.
2. Paste, making sure to use the destination theme. (Word will also apply the formatting of each style from the destination document.)
3. Check for glitches in the formatting of the pasted content. If you find any, try reapplying the correct style to the affected content.

By using templates, you were able to produce the report quickly while meeting HHS standards—even with Ms. de Spizer working with the fonts and color schemes she prefers.

Persons' preferences are not always driven by individual taste. Using a different font in a larger size with a specific color contrast configuration, may help someone that has a visual disability. Adjusting these characteristics may simply help someone from getting headaches during lengthy writing sessions.

In another video, "Tailoring Word to Suit You", we'll explore the ways to customize your Word environment to accommodate your needs while also keeping your co-workers and boss happy.

Conclusion

When you work with other authors to produce different parts of a single document, be sure each of you follows these guidelines:

- If possible, use the HHS Reports template and theme to draft your part of the document.
- If you cannot use the HHS Reports template and theme, be sure to:
 - ▶ Use the same styles as the HHS Reports template for the same purposes.
 - ▶ Use a theme to set the color scheme and font faces in your contribution.
 - ▶ Whenever possible, be sure to attach the HHS Reports template and theme to your work before sharing it with your colleagues.
- If you work with a colleague who does not use the HHS Reports template or theme:
 - ▶ Realize that they might have a good reason not to use them.
 - ▶ Confirm with them that they are using a theme, a template, and the correct style for each role.
 - ▶ Adding their content to a document in the HHS Reports template and theme is as easy as 1-2-3.

And what is that 1-2-3? By now you know:

1. Copy all of their document.
2. Paste it into your document.
3. Check for glitches in the formatting of the pasted content—especially in numbered lists. If you find any, try reapplying the correct style to the affected content.

Now you can produce a document made from different members of the team that is readable by everyone.