



# **Dashboarding Word: Revealing the Right Tools for the Write Job Right Now Part 5: Tailoring Word to Suit You**

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

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# Introduction

After watching the previous four videos in our Dashboarding Word series, we hope that you've learned a lot about using Microsoft Word. If you've taken some time to practice these techniques, you're hopefully producing reports at a much faster pace while professionally incorporating standards and accessibility for everyone. Let's take a minute to review the main points the previous videos have covered.

- 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.
  - Switching the theme to HHS Reports.
  - And setting colors to the HHS Branding Palette.
- When you use styles and the HHS Reports theme properly, your documents will generally be accessible.
- Occasionally in Word, an author may need to create his or her 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, the HHS Reports template can be applied as easy as 1-2-3:
  1. Copy all the author's document.
  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.

If you cannot easily see Word without enlarging the print, if you have trouble reading the fonts your coworkers use, and especially if you have a hard time with

the glare of a white background, this tutorial will help you adjust Word so working with it is more comfortable for you:

- No matter how much a document looks like a standard HHS report, it can be a nightmare to work with if the author didn't use styles correctly.
- An author can use a template in many different ways to make it easier for them to work with Word.
- No matter how odd a document might appear, if the author uses the same styles used in the HHS Reports template, you already know making that document look like a standard HHS report is as easy as 1 – 2 – 3.

Ready? Let's begin.

## **Larry Lowvision**

This is Larry Lowvision. Even when he uses glasses or contact lenses he has approximately 20/160 eyesight. When Larry works on a computer, he has to deal with two obstacles:

- No matter how large the text is, he still must get very close to the monitor to make it out.
- With his eyes so close to the monitor, if either the background or foreground is white, Larry soon gets a severe headache.

Still, Larry is able to work with documents thanks to a simple accommodation: He uses his own Word template and a medium-dark brown background.

For this tutorial, Larry took on the most chapters of our Texas Medicaid Drug Donation Study report. He worked on the:

- Executive Summary
- Introduction
- Potential Donors
- Conclusion

## **Assessing Larry's Document**

Let's open the file that Larry Lowvision created and figure out whether we need to fix anything and, if so, what:

## Executive Summary

Section 2 of [Senate Bill 1243](#), 84<sup>th</sup> Texas Legislature, Regular Session, 2015 requires the Department of State Health Services (DSHS) to conduct a study to determine the feasibility of creating a drug donation program for unused Medicaid-reimbursed drugs at hospitals, nursing homes, and other health

Wow! Right away, we can see that Larry's document looks like it's in terrible shape. Indeed, it would be hard for most people to read. But looks can be deceiving. To know how to fix Larry's document, we must understand how he made it look this way. Let's start with the basics—the structural elements:

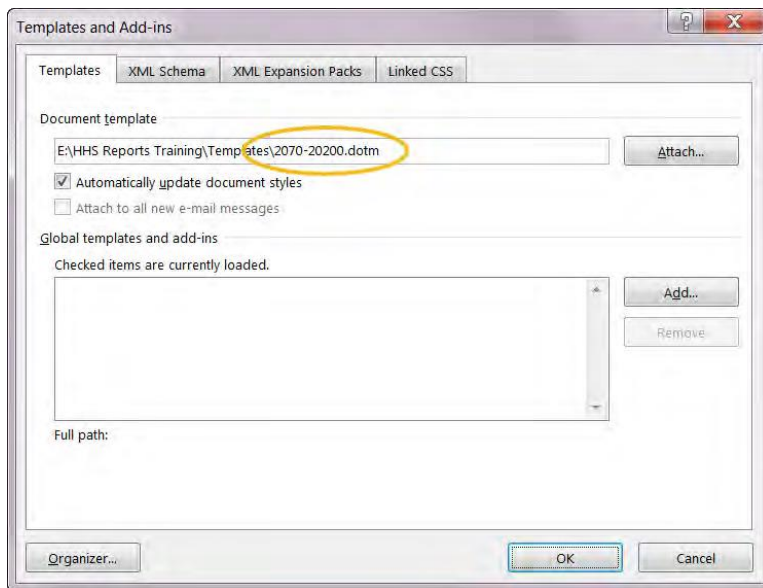
- What template did Larry use? (If we see it's anything other than Normal or the HHS Reports template, we might want to ask Larry more about its features.)
- Does his document have the right outline structure?
- Did he use the right styles?

We can answer these questions quickly with three commands found in the Structure group of the HHS Reports tab:

- Templates
- Doc Nav (for Navigation)
- Styles

### Use the Template Command to See Which Template Is in Use

Click the Templates command. The Templates and Add-ins dialog box opens:

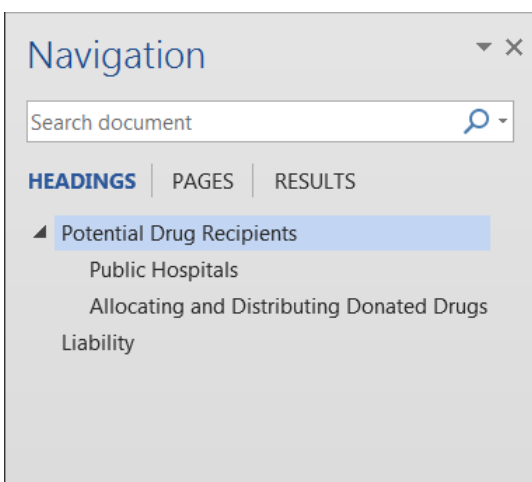


Larry is using a template called 2070-20200.dotm. This gives us a clue about Larry's choice of fonts and color scheme. Because 20/70 to 20/200 is the range of vision that is associated with a disability called low moderate vision, we can guess that this template is set up specifically to accommodate Larry's disability.

We could go ahead and attach the HHS Reports template now, but first let's finish checking the basics.

## 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:



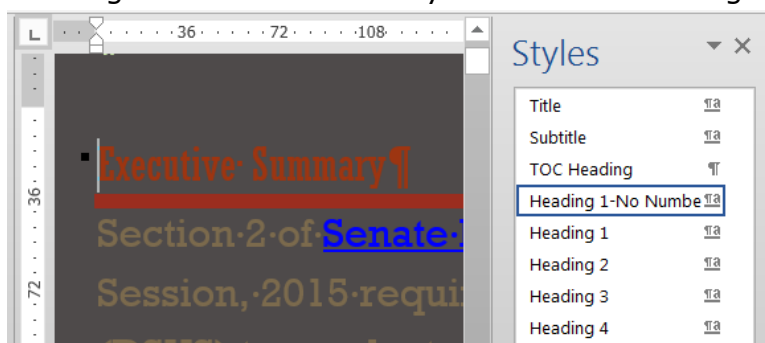
Plain as it is, Larry's document has structure—the outline is right there.

Normally we would scroll through the document to see if all the headings appear in this outline, but Larry's document is so simplistic, we'll postpone that until later.

## Use the Styles Pane to Check the Style of Each Paragraph

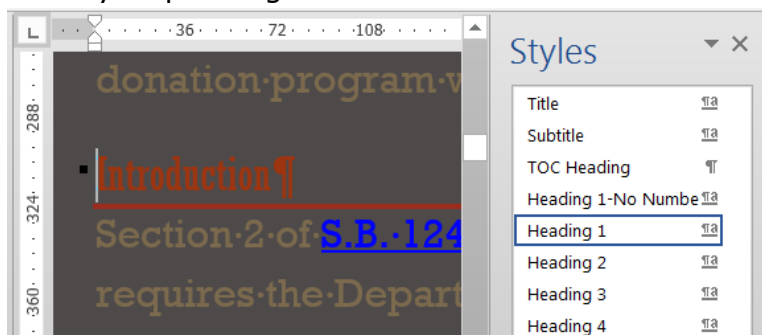
Now let's check the third basic point: Are we sure that Larry used styles? If he did, were they the right styles?

1. Keep the cursor at the beginning of Larry's document—in other words, in the heading "Executive Summary." In the Structure group, **click Styles:**



Although the heading is red and has a thick underline, its style is Heading 1-No Numbering. That makes sense:

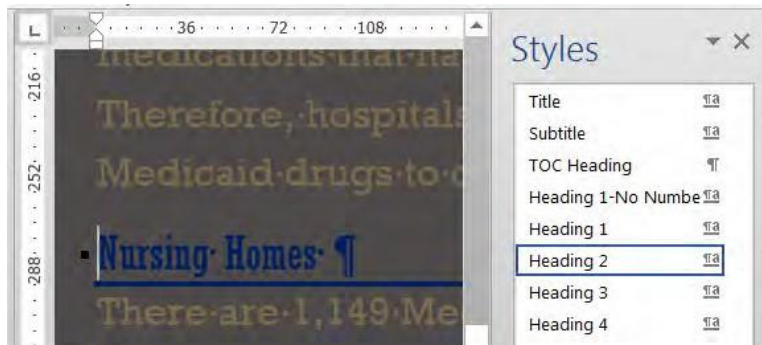
- a. The executive summary is a chapter or main section of the document, so it should begin with a Heading 1.
  - b. We don't number the heading for the executive summary, so it would be a good idea to have a "No Numbering" version of Heading 1.
2. In the Navigation pane, **click the next heading: Introduction.** Now look at the Styles pane again:



In the Styles pane, the style for "Introduction" is Heading 1. Even though this heading is not numbered, it is in the style used in the HHS Reports template for the main sections of our report. This should be fine. You may remember how Verdana de Spizer used arrowheads for her bullets. This is

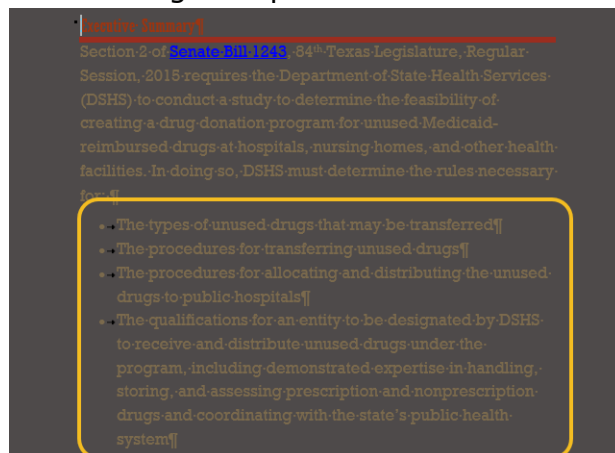
very similar, as Larry has simply removed the numbering from his version of the same HHS report style.

3. Does Larry keep using styles? In the Navigation pane, **click one of the indented headings: Nursing Homes**. The indentation shows that it is one level below Heading 1 in the outline. Checking the Styles pane, we can see that its style is Heading 2:

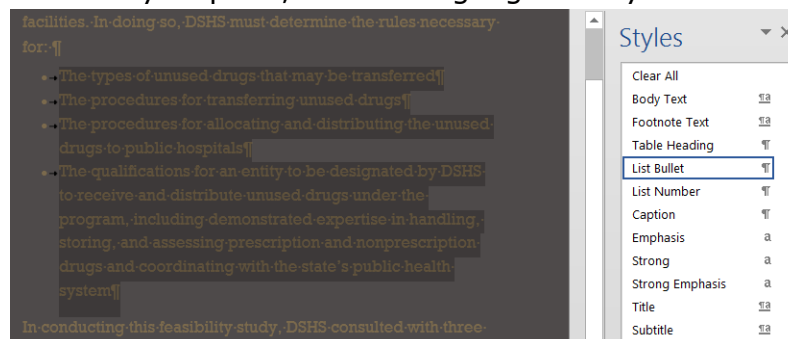


So far, so good.

4. What about Larry's lists? Let's check each of them.
- a. We saw one on page 1. To get back to it quickly, click Executive Summary in the Navigation pane:



- i. Select the whole list.
- ii. In the Styles pane, find the highlighted style:



List Bullet. That makes perfect sense for a bulleted list.

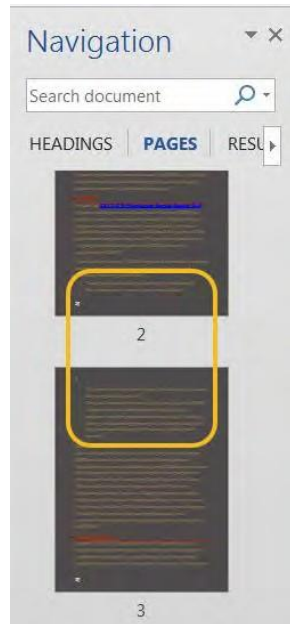
Because we highlighted the whole list, we know every item in it uses this style. If two or more styles are in use in the selection, no style will be highlighted in the Styles pane.

- b. To find the other lists, we could scroll through the document. But there's another way. Especially when you're working with a long document, it could be a lot faster:
  - i. In the Navigation pane, click PAGES. The display switches from the outline of the document to thumbnail images of each page:

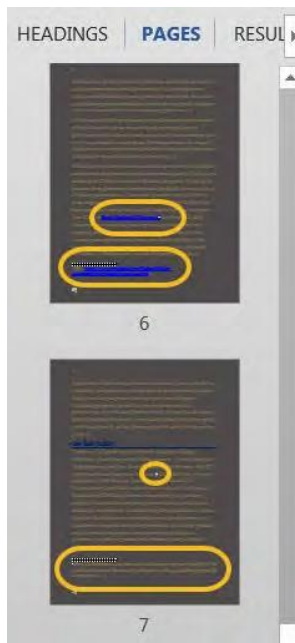


- ii. In the Navigation pane, scroll down. Starting at the bottom of page 2 and continuing on to page 3, there is another indented block:





- iii. Select the list, check the Styles pane, and continue.
- 5. On scrolling through the rest of the pages in the Navigation pane, we see that there are no more lists in the document. But there is something else we haven't checked out. Look at the thumbnails of pages 6 and 7:

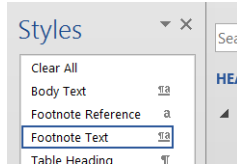


- 6. Footnotes! Let's take a few seconds to check them. We will start with the second footnote first.
  - a. In the Navigation pane, click the image of page 8. In the document, focus will jump to the top of that page.

- b. If the bottom of page 7 is not displayed in the document window, scroll up a bit. Select the text of Footnote 2:

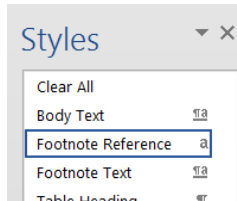


- c. In the Styles pane, see what style is in use:



Footnote Text. That makes sense for the text of a footnote.

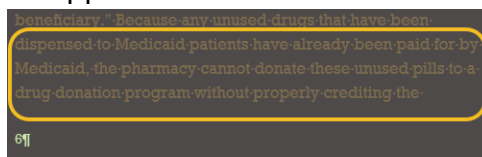
- d. Back in the document window, find the reference to Footnote 2—that is, the superscript 2 in the body of the report. Select it.
- e. Check the Styles pane:



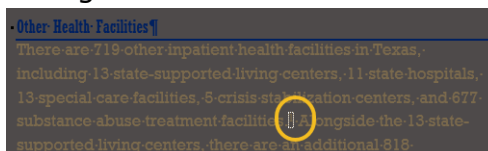
Footnote Reference. This makes sense for the style of a reference to a footnote.

- f. Repeat those steps for Footnote 1 on page 6.
- i. Before we leave the footnotes, in the body of page 6, delete the reference to Footnote 1. Check to see if two things happen:

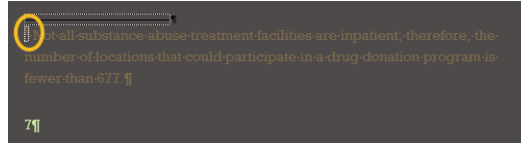
- (1) At the bottom of page 6, the text for Footnote 1 should disappear:



- (2) On page 7, the superscript number for the footnote should change from a 2 to a 1 in the body of the document:



and in the footnote itself:



You have just confirmed that Larry used real footnotes in his document. Word is managing their numbering and placement. Because Word is managing them, you also know they are accessible to people with screen readers—that is, they can make their own choice about what to do:

1. Keep reading the body of the document without reading the footnote.
2. Skip down to the footnote text so the screen reader will read it to them before continuing with the rest of the document.

Before we continue, press CTRL+Z or click the “Undo” command in the Quick Access Toolbar to restore Footnote 1.

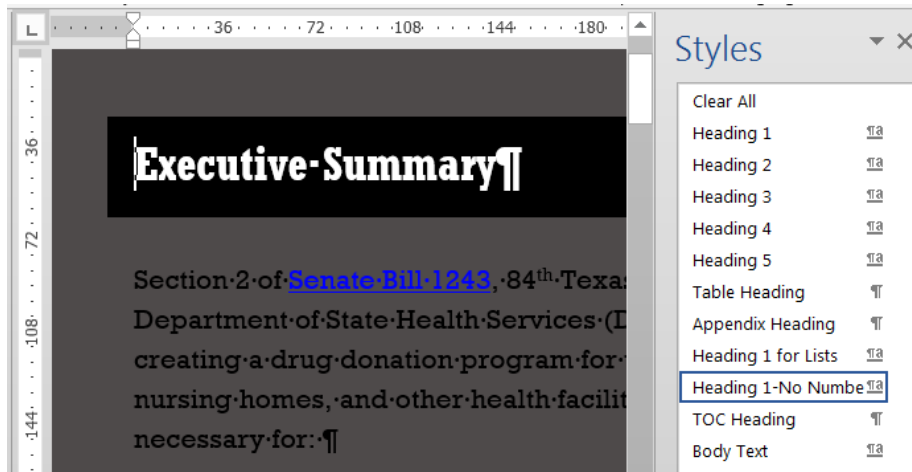
## Fixing Larry’s Document

As odd as Larry’s document looks, he did build the right structure into it and used styles. Remember, those are two of the most important elements to making a document accessible and making it possible to apply branding.

Since Larry used the important elements, fixing his document will be as easy as 1–2–3. Before we go on, let’s make sure we’re all in the same place in the document: click “Executive Summary” in the Navigation pane.

## Attach the HHS Reports Template

1. In the Structure group, **click the Templates command** to open the Templates and Add-ins dialog box.
2. **Click the Attach... button** and **navigate to the HHS Reports Templates.**
3. **Click the Open button.**
4. Make sure that the “**Automatically update document styles**” check box is selected.
5. **Click the OK button.** You have just attached the HHS Reports template to Larry’s document.



Has the template done all it should?

- Each style has its own distinctive formatting:
  - As we can see in the Navigation pane, each Heading 1 is now numbered.
  - Each Heading 1 is also white against a dark background.
  - The body of the document is now black and 11 point.
- But not all of the colors are right:
- Heading 1 should have a dark blue background.
- And, if we look at a Heading 2—for example, Hospitals—it's blue, but not the same shade of blue called for by HHS Branding:



- Larry's dark background color is still there.
- And the font faces are wrong:
  - Larry's headings look a little squished. His template uses Rockwell Condensed. HHS Branding calls for us to use standard Rockwell for headings in our reports.
  - Larry's template uses Rockwell—not Verdana—in the body of the document. Unlike most people with low vision, Larry finds the serifs on the characters helpful.

The color scheme and the default font faces for headings and the body of the report are controlled by the document's theme. The theme is not a part of the template—so, yes, the template has fixed everything that it should. Let's go on to Step 2.

## Switch the theme to HHS Reports

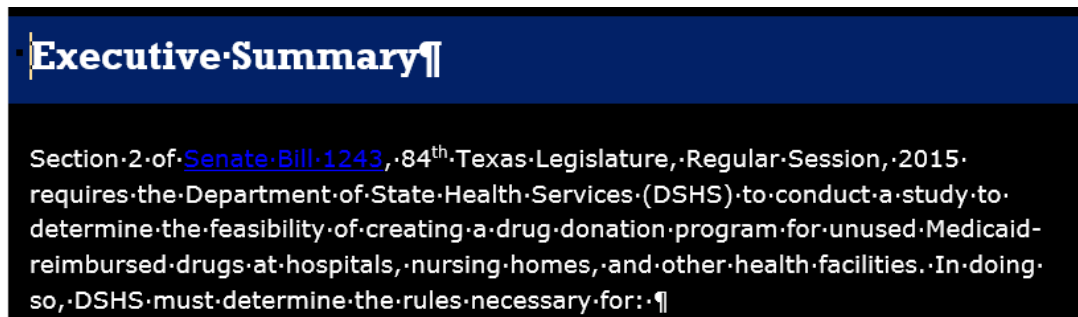
At this point, you might be wondering, “*Why* are we fussing with themes? After all, how often will we have a coworker who customizes Word like this?”

How often? Actually, always. You may recall from our previous video, “Templates To Tackle Your Troubles”, that the standard Microsoft Office color scheme and fonts are set with a theme called Office. Whenever you receive a draft from someone who has not customized their settings, the document will probably have the fonts and color scheme of the Office theme. To use their document in your report, you will have to be sure it uses the HHS Reports theme.

Remember the steps?

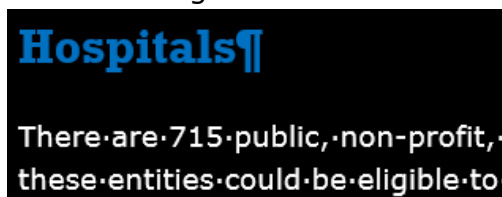
1. **Click the Design tab.**
2. **Click the Themes drop-down menu.**
3. **Select the HHS Reports theme.**

Our report is really coming together.



We've made some progress:

- In the headings, the font is Rockwell.
- In the body, the font is Verdana.
- Each main heading is white against a dark blue background.
- Each Heading 2 now has an HHS Branding shade of blue:



But the background—it's black! And the body is white! What is going on? What did I do wrong!?

Don't panic. This is actually the easiest fix of all.

## Skim the document for any inconsistencies

When you see the same color as the background for an entire page, including the margins, one setting is making that difference: the Page Color. This is the one inconsistency in Larry's document.

In Microsoft Office applications, Page Color is not a property of any style. The fact that it changed when we changed the theme tells us that Larry's theme has this shade of brown where the HHS Reports theme uses black. But we don't have to worry about what color it happens to be.

Page Color is a document-wide property, and behaves much like a watermark. It can be changed for any document with the click of a command. Here's how:

1. In the Ribbon again, we'll return to the DESIGN tab
2. In the Page Background group click the Page Color dropdown menu.
3. Select No Color. The background of the page will turn white and the font will become black:

## Executive Summary

Section 2 of [Senate Bill 1243](#), 84<sup>th</sup> Texas Legislature, Regular Session, 2015 requires the Department of State Health Services (DSHS) to conduct a study to determine the feasibility of creating a drug donation program for unused Medicaid-reimbursed drugs at hospitals, nursing homes, and other health facilities. In doing so, DSHS must determine the rules necessary for:

With the background color gone, Larry's document is much easier for most people to read. Because the text color is actually set to "Automatic," the color of the text changes when it has too little contrast to the currently selected background color. Let's save our work as DraftReport.docx.

But why did we show you this? Remember, because Larry has low vision, he needs to get so close to the screen that a bright white background would give him a headache. People with low vision aren't the only ones who are bothered by a white background. If your monitor produces too much glare for your comfort, you can make yourself more comfortable with one click—Page Color. Just remember to change it back to "No Color" before the document is published.

## Conclusion

Our team's goal is to publish an HHS Report that is fully accessible and conforms to HHS Branding. Larry's document didn't look like our target at all, but how hard was it to make it look as it should?

As we said time and time again, easy as 1–2–3! Remember why it was easy for us to fix Larry's document:

- He used a template to make a set of styles readable to him.
- Each of the styles in his template is named according to the role of its content.
- Each of those styles has the same name as the style for the same role in the HHS Reports template.
- Larry used a theme to control his color scheme.
- The one feature Larry needed that he couldn't get from his template or theme—the background color of the page—is controlled throughout the document with one click.

Now you can format a document suited to help someone's special needs into a document readable by everyone.