Making Word Suit Your Enterprise[*]

Why Mess with Word?

Keep all the default settings because:

- People hate change
- You need Word to work the same for everyone
- We need a consistent look (branding)
- Changing them will break things
- Updates undo customizations
- More?

Tailor Word's settings if you need:

- Documents that are:
  - Manageable
  - Branded
  - Accessible
  - Reusable
- A Third-Millennium word processor that is:
  - Powerful
  - Adaptable
  - Usable:
    - Easy to use
    - Leads you in the right direction

Keys to Success:

- Provide better interfaces
- Manage colors and fonts with a custom theme
- Build templates customized to specific jobs:
  - Legislative Reports
  - Letters
  - Memos from the Top
  - Meeting Agendas
  - Meeting Minutes
  - Normal (for your enterprise)
- Get IT's participation and support
- Support it yourself:
  - Educate employees
  - Embed local experts

---

[*] Scheduled as "Make MS Word Do the Hard Work for You and Your Organization." 11 a.m., Room 211, Trustee Hall. By Cliff Tyllick, EIR Accessibility Coordinator, Texas HHS.

Better Interfaces

- Word's default:
  - Hides the most useful tools
  - Wastes space on the monitor
  - Leads users to failure
- Custom tabs and toolbars:
  - Reveal hidden jewels
  - Don't have to hide Home
  - Can be deployed system-wide
  - Are customizable:
    - ◊ For enterprise needs
    - ◊ For individual needs
  - Are easy to install and swap out

Custom Themes

See Design tab.

- Applies to the entire document
- Two worthwhile features:
  - A pair of fonts:
    - ◊ Body
    - ◊ Headings
  - A color scheme with 12 colors:
    - ◊ 4 Text/Background colors
    - ◊ 6 Accent Colors
    - ◊ Hyperlink
    - ◊ Followed Hyperlink
- Has a third feature to ignore (Effects; makes content inaccessible)
- Your custom theme can:
  - Replace Word's Office theme (Set as Default)
  - Incorporate your branding palette
  - Be replaced by any other custom theme (Reasonable Accommodation)

Custom Templates

See Structure > Templates and Styles pane. **Note**: *In Word's default interface, the user must turn on the Developer tab to get access to this command.)*

- Set formatting
  - ▸ Styles for text
  - ▸ Table Styles
  - ▸ Bullet/Numbering formats
    - ◊ Customize (more than one) format
    - ◊ Link to a style
- Recommend styles needed for this template
  - ▸ Example 1: Legislative Report
  - ▸ Example 2: Circular
  - ▸ Example 3: Correspondence
- Hide other styles
- Use Quick Parts *(Insert tab > Text group > Quick Parts)*
  - ▸ Makes the difficult easy:
    - ◊ Tables in Landscape orientation
    - ◊ Table of Contents
    - ◊ Maps
  - ▸ Provides consistency in key components
  - ▸ Can save in any template:
    - ◊ Building Blocks (available to all documents)
      - o Intentionally blank page
      - o High-level org chart
      - o Headquarters info
    - ◊ Normal (I haven't tried it)
    - ◊ Job-specific:
      - o Page 1 header and Page 2 header (unique to each)
      - o Signature block (correspondence)
      - o Cover (reports; policy manuals)
    - ◊ Unit-specific
      - o Division logo lockup
      - o Office address
      - o Org chart
  - ▸ ***If you can select it, you can make it a Quick Part.***
- Customize the Normal template:
  - ▸ Recommend sensible styles
  - ▸ Edit them to meet your needs
  - ▸ Sort them in a reasonable order
  - ▸ Add Table styles
  - ▸ Apply your custom theme

Get IT Involved

- Customize Word's User Settings
  - ‣ Add your custom interface (tab and Quick Access Toolbar)
    - ◊ Put it second
    - ◊ Or keep it hidden
  - ‣ In Styles pane: Options
    - ◊ Select styles to show: Recommended
    - ◊ Select how list is sorted: As Recommended
  - ‣ In C:\Users\[user ID]\AppData\Roaming\Microsoft\Templates:
    - ◊ Shortcut to Custom Office Templates (C:\Users\[user ID]\Documents\Custom Office Templates)
    - ◊ Enterprise Templates
    - ◊ \Document Themes:
      - o Custom theme files
      - o Custom palette in \Theme Colors
      - o Custom font files in \Theme Fonts,
    - ◊ \Charts:
      - o Customized chart and graph settings
      - o Default color scheme based on your custom palette
      - o Customize for accessibility:
        - ▪ Line widths
        - ▪ Data point sizes
        - ▪ Bar separations
        - ▪ 2D, not 3D (unless 3 variables)
        - ▪ Color not only difference (shapes of data points; patterns)
      - o Save as Template (not a Word template)
- *Bonus:* **Most user settings apply to all Office programs. For example:**
  - ‣ Color palette available to all
  - ‣ Chart templates (primarily for Excel) available to all
  - ‣ Fonts (primarily for Word) available to all

Provide support

- [Tutorials on Texas Governor's Committee on People with Disabilities website](#)
- One-on-one tutorials with authors (in person or via Skype)
- Encourage people who learn to share with their colleagues
- *Your mantra:* **This approach will make it easier for you to manage your Word documents. Not coincidentally, those documents will also be more accessible.**