Working with the master template

V07.2021

Content

1 Background

Word uses the template "Normal.dotx" as default, if you begin a new document. In this default template all common styles like headings, lists or captions are already available.

However, it makes sense to use your own user defined template. In such a template you define all needed paragraph and character styles and AXESWORD® document settings only once. After that you can use your template again and again and you can work with your customized styles.

We have already done this work and have created a master template for you. This template contains:

- Headings (Level 1 - 9)
- Paragraph
- Multilevel lists with bullet points
- Multilevel lists with numbering
- List Continue
- Row and column headers for tables (row and column headers of level 1 - 5)
- Data cell
- Link
- Footnote
- Quote
- Caption
- Table of contents

Appropriate roles were assigned to all styles so that you immediately get an accessible PDF/UA document when converting your Word document to a PDF document by using AXESWORD®.
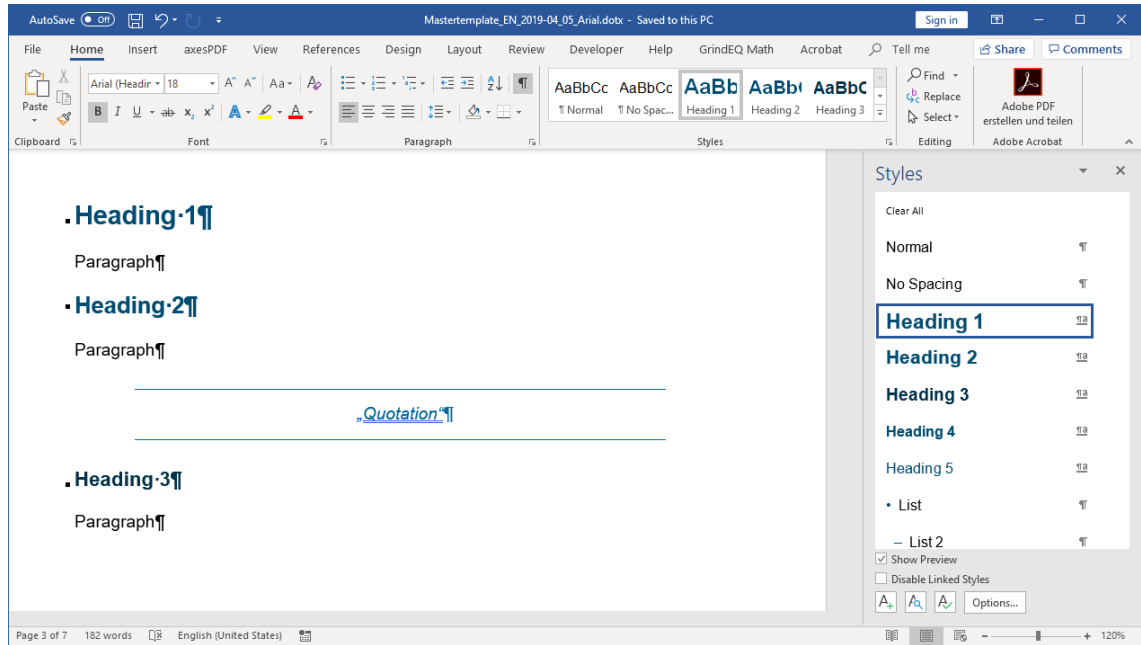
Figure 1: Word: Master template

2 Preparing Word: Useful views and settings

2.1 Fade in paragraph marks and formatting symbols

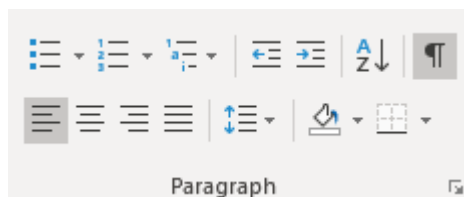Click in the RIBBON TAB: HOME in the COMMAND GROUP: PARAGRAPH on the ¶-symbol (top right).

Figure 2: Command group "Paragraph" in the ribbon tab "Home"

Reason

You can see in the document view which paragraph styles and formatting symbols were used.

2.2 Fade in task pane "Styles"

Click in the RIBBON TAB: HOME in the COMMAND GROUP: STYLES on the dialog box launcher (⬎) in the right corner - the TASK PANE: STYLES will be faded in on the right side.

Reason

You can see which styles are available respective which style was assigned to a paragraph.

2.3 Fade in task pane "Navigation"

Activate the CHECK BOX: NAVIGATION PANE in the COMMAND GROUP: SHOW in the RIBBON TAB: VIEW.
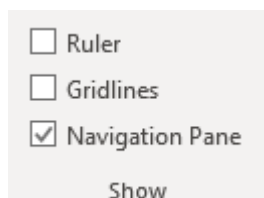

Figure 3: Command group "Show" in the Ribbon tab "View"

The TASK PANE: NAVIGATION will be faded in on the left-hand side.

Reason

You can see which headings were used and how the document is structured.

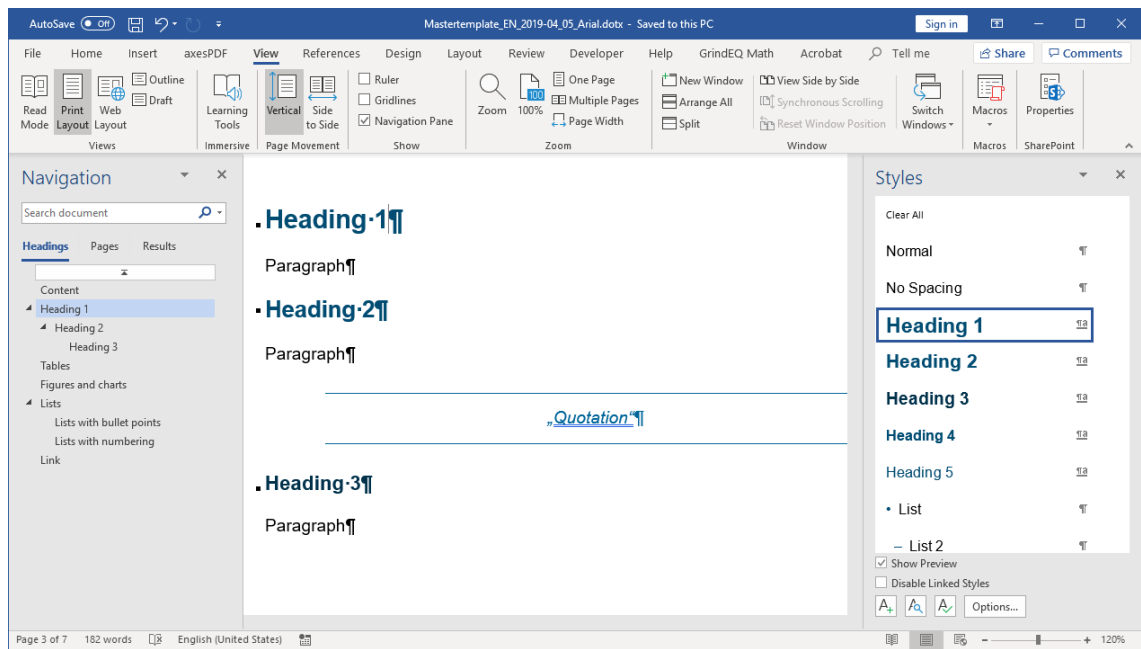When you prepared these three settings you will see the following view:

Figure 4: Word-window with the task panes "Navigation" (left hand side) and "Styles" (right hand side)

3 Working with the master template

Double click on the master template – this is a very easy way to start a new document.

At the outset save your document with an appropriate new file name.

3.1 Document title

Define the document title in the document properties right at the beginning of your work. Click on the auf die RIBBON TAB: FILE and enter in the TEXT BOX: TITLE a corresponding document title.

Properties ▾

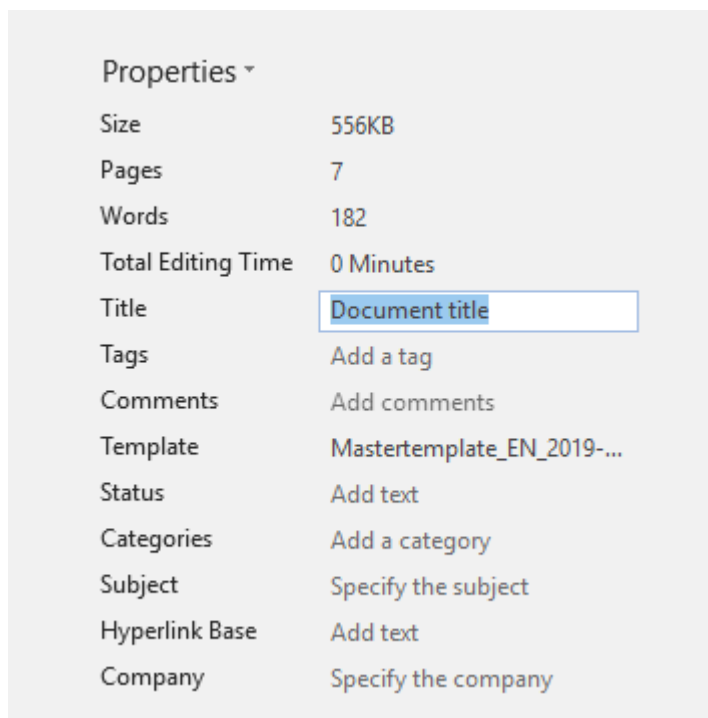|	
Size	556KB
Pages	7
Words	182
Total Editing Time	0 Minutes
Title	Document title
Tags	Add a tag
Comments	Add comments
Template	Mastertemplate_EN_2019-...
Status	Add text
Categories	Add a category
Subject	Specify the subject
Hyperlink Base	Add text
Company	Specify the company

Figure 5: Document settings

3.2 Define language

Define the language of your content by clicking on the language in the status line at the bottom on the left-hand side. In the DIALOG WINDOW: LANGUAGE you can select the corresponding language.
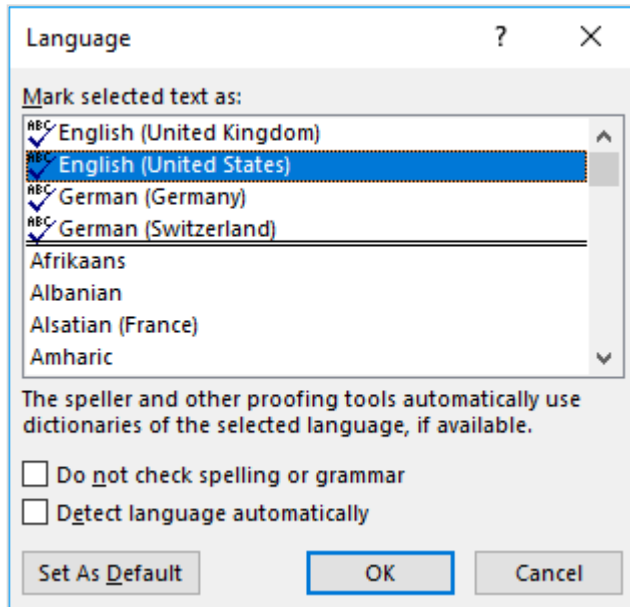
Figure 6: Dialog window "Language"

3.3 Title and subtitle

Start your document and enter title and subtitle. You can simply overwrite the words "Title" and "Subtitle" on the title page.
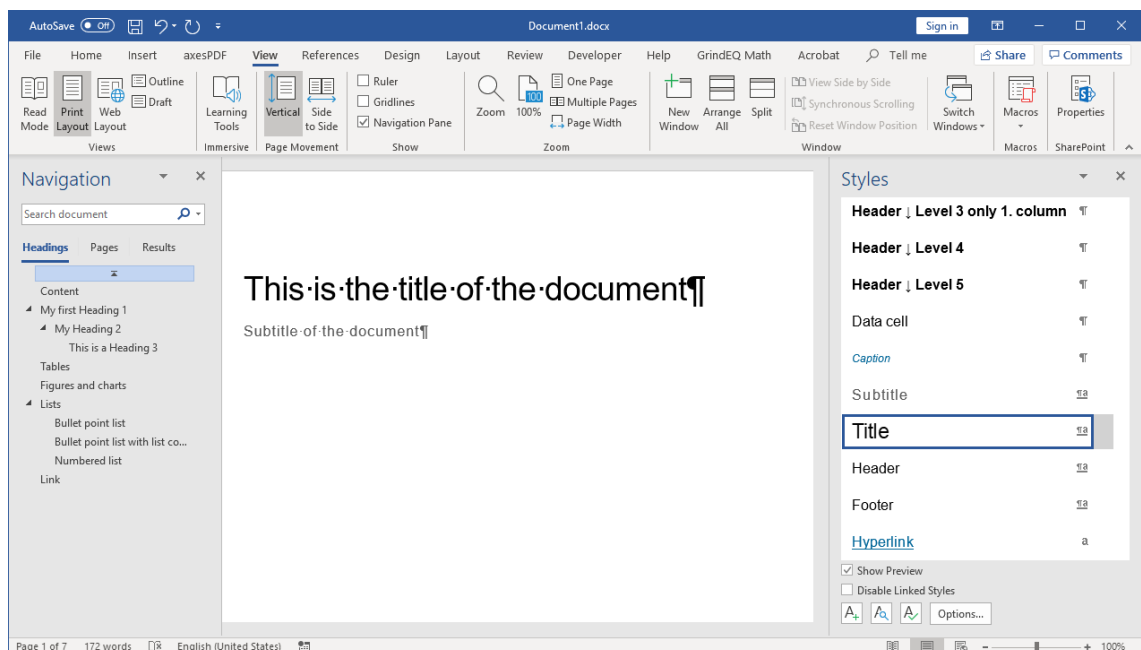

Figure 7: Title and subtitle

3.4 Headings and paragraphs

Use the paragraph styles "Heading 1", " Heading 2" and so on according to the structure of your document and take care that you do not skip any level.

Reason

Headings are important for quick navigation within your document – especially for users of assistive technologies (AT).

Now you can type headings and paragraphs. Again, you can just overwrite the existing headings and paragraphs.
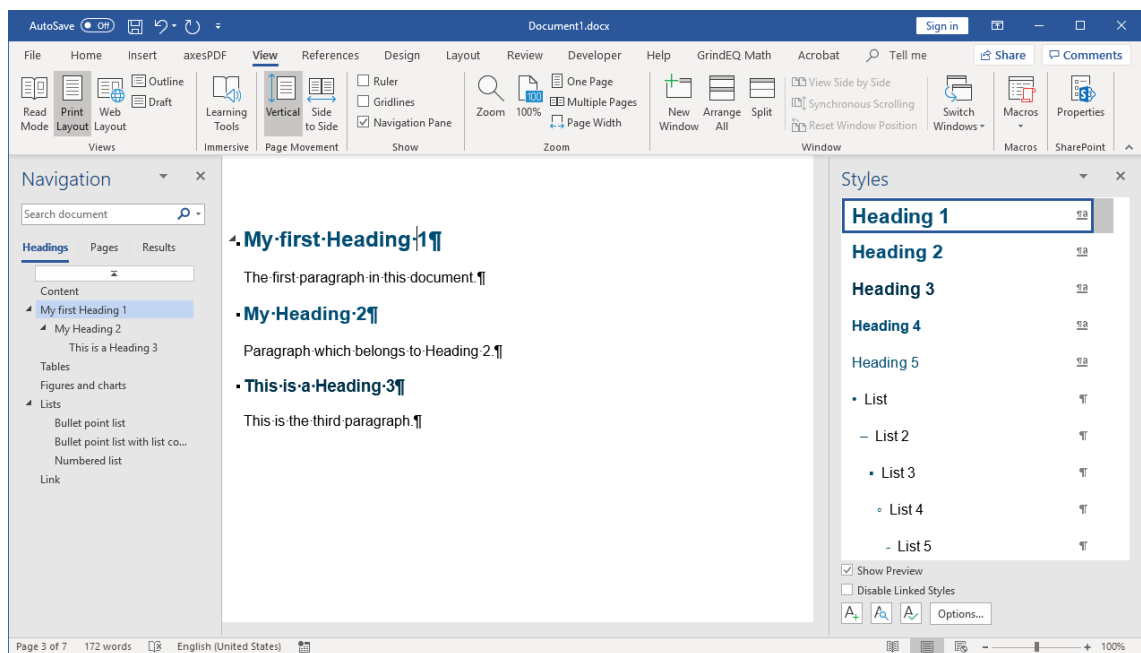

Figure 8: Headings and paragraphs

For further headings and paragraphs begin a new paragraph, e. g. the new paragraph "This shall become a Heading 4".
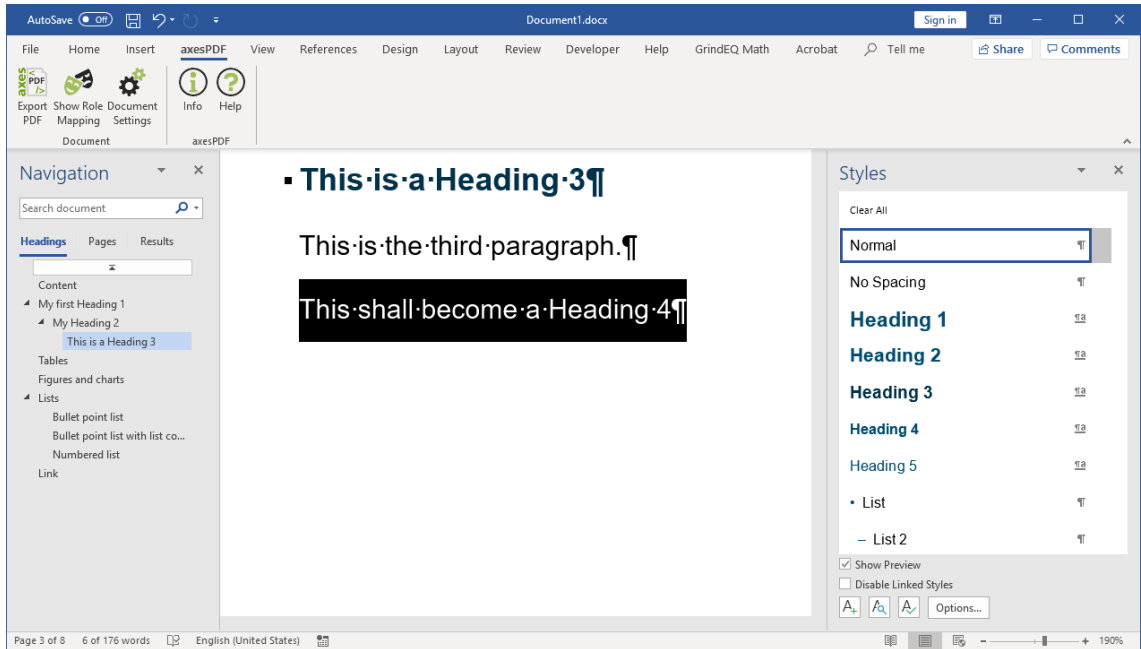
Figure 9: Headings and paragraphs – new heading 4

Afterwards assign the corresponding paragraph style to this paragraph by clicking on "Heading 4" in the TASK PANE: STYLES. It is sufficient if you position the cursor in the paragraph (i. e. you do not have to select the whole paragraph when assigning a paragraph style).
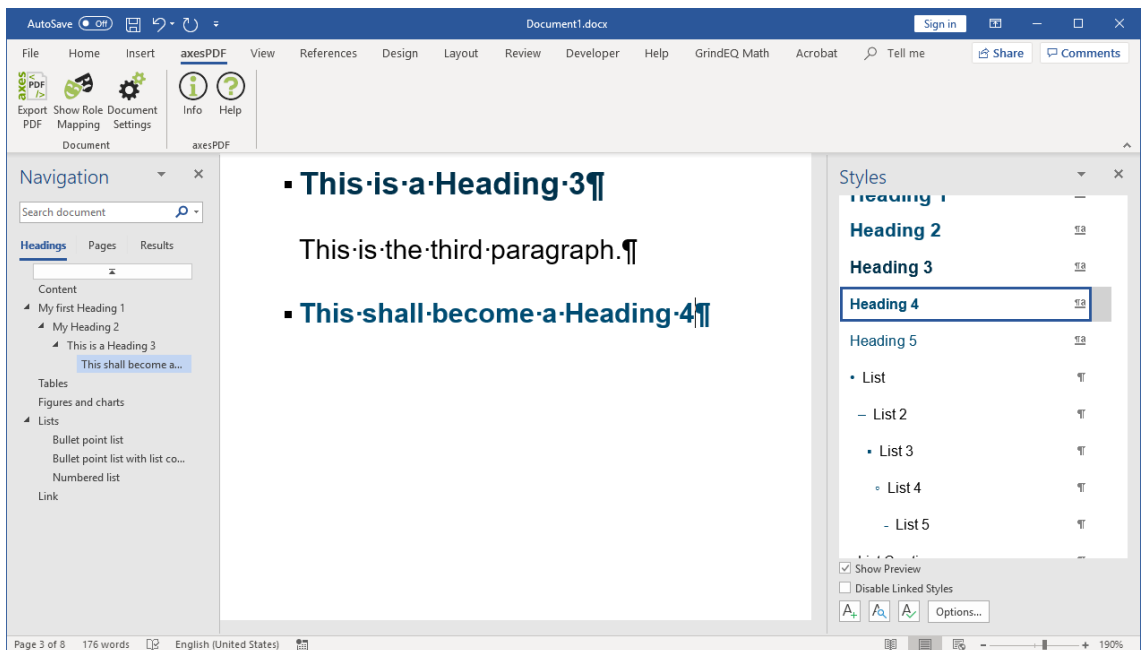

Figure 10: Headings and paragraphs - Heading 4 was assigned

Please use hard and soft line breaks correctly:

- Hard line break (Return key): begin a new paragraph
- Soft line break (Shift + Return-key): begin a new line within a paragraph

3.5   Tables

Overwrite the caption of the table, the table headers and the data cells with your values. You can also delete rows or columns or insert new ones. Use right-click in a row or column and select MENU OPTION: INSERT or MENU OPTION: DELETE.
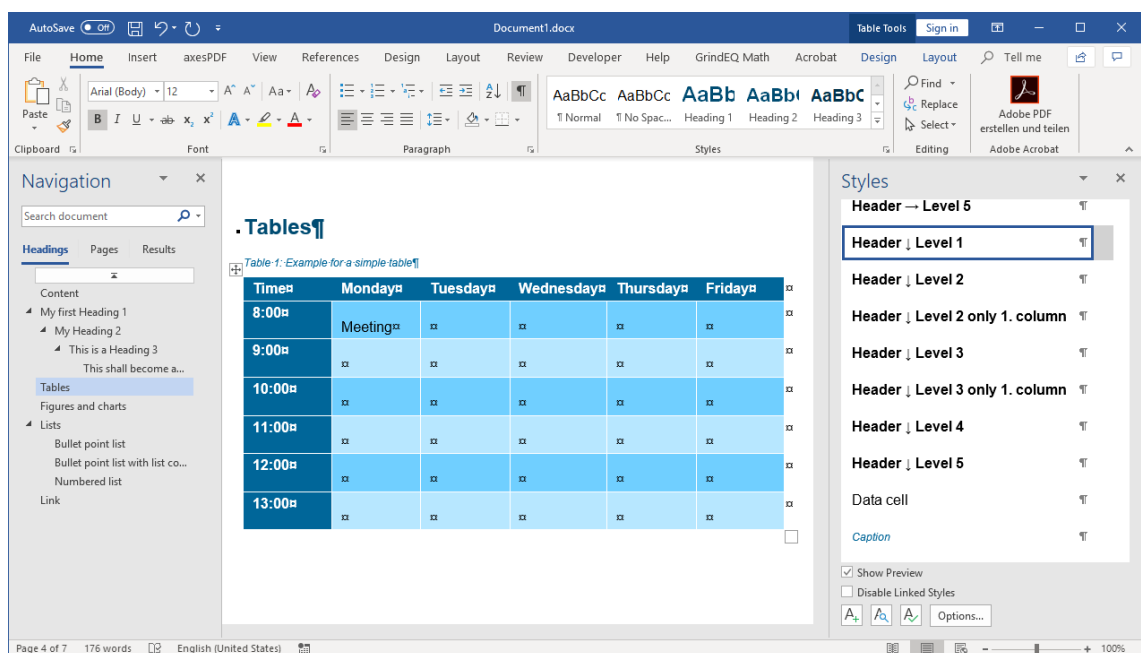

Figure 11: Example of a table

3.6   Figures and diagrams

Decide whether your graphics are relevant content or just decorative elements.

Figure 12: Photo of a forest

3.6.1 Relevant content

Anchor your figures in case they do not have the **LAYOUT OPTION: IN LINE WITH TEXT**. Click therefore on the figure and then on the symbol for the layout options. A list will be opened where you can select the anchoring.
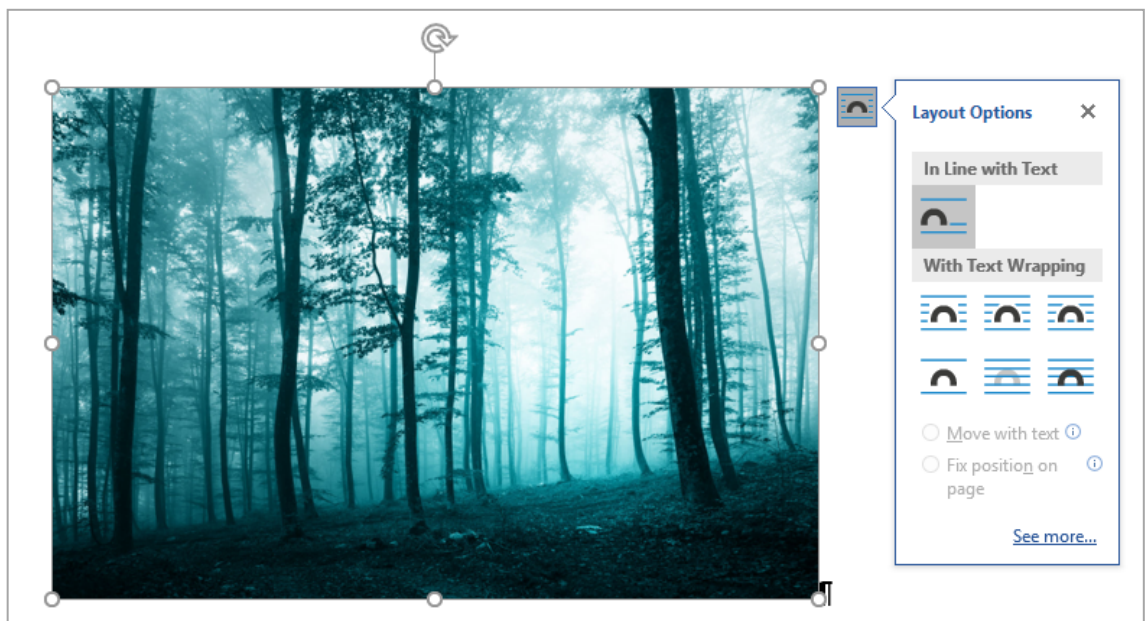

Figure 13: Layout options of a figure

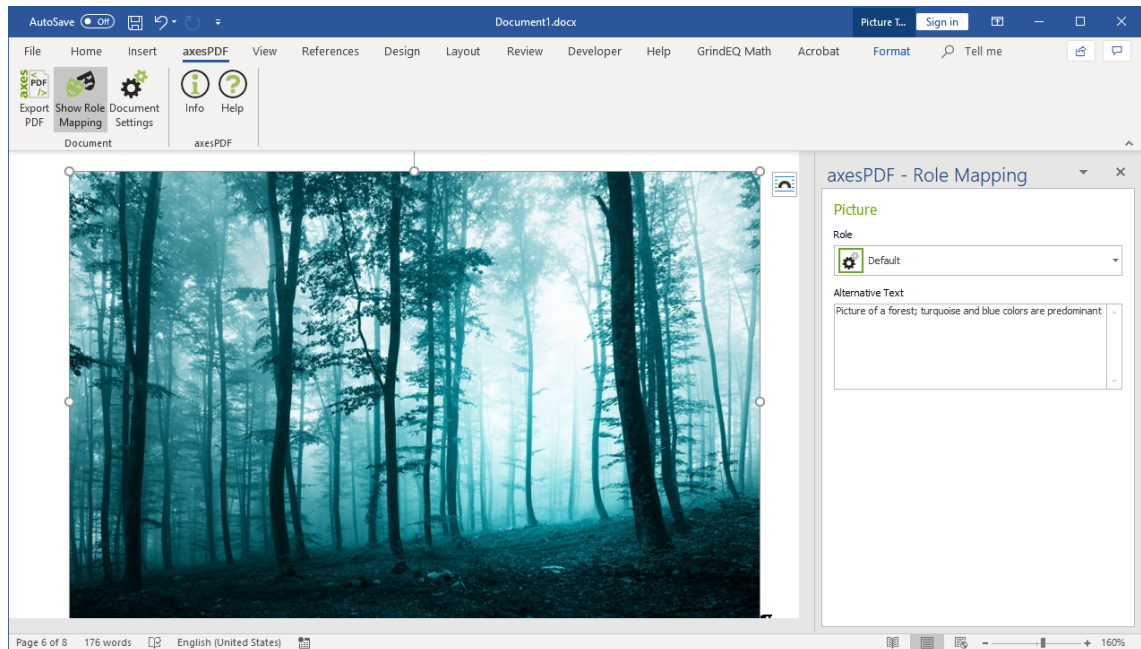Add an alternative text in the **TASK PANE: AXESPDF – ROLE MAPPING**.

Figure 14: Alternative text of a figure

Reason

Figures can not be recognized by blind users. With the alternative text they have access to the main issues of the figure.

3.6.2 Decorative elements

When a figure is a decorative element, then assign this element the role "Artifact" in the Task Pane: axesPDF - ROLE MAPPING.
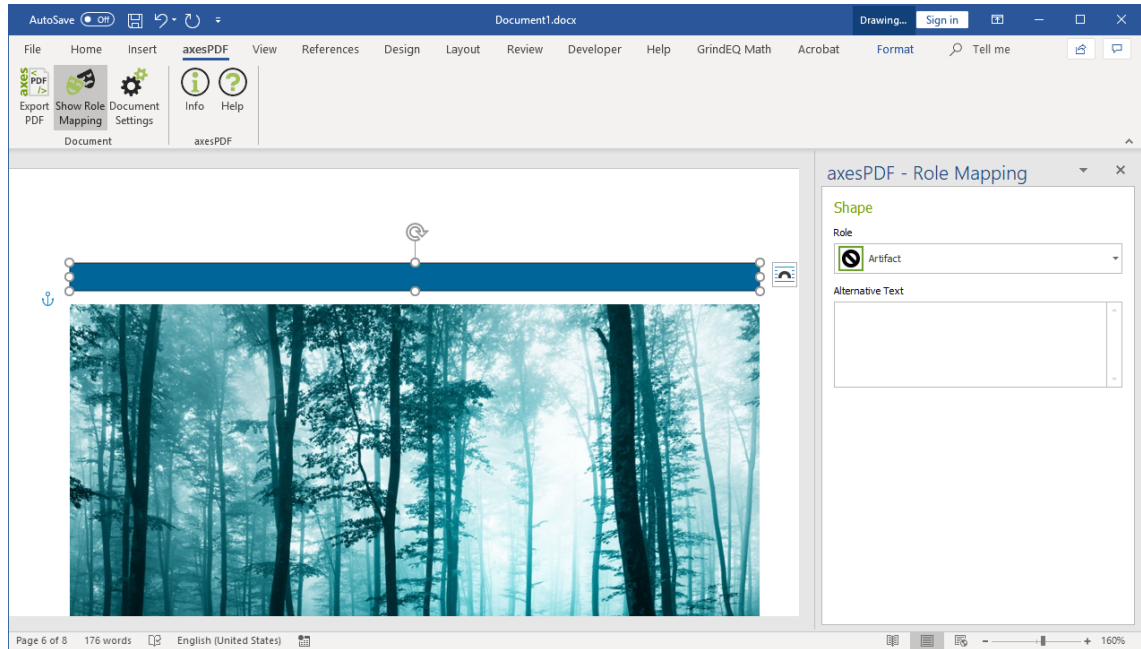
Figure 15: Decorative element blue rectangle

3.7   Lists

3.7.1   Simple lists

Type all bullet points in separate paragraphs. Then assign these paragraphs the paragraph style "List".
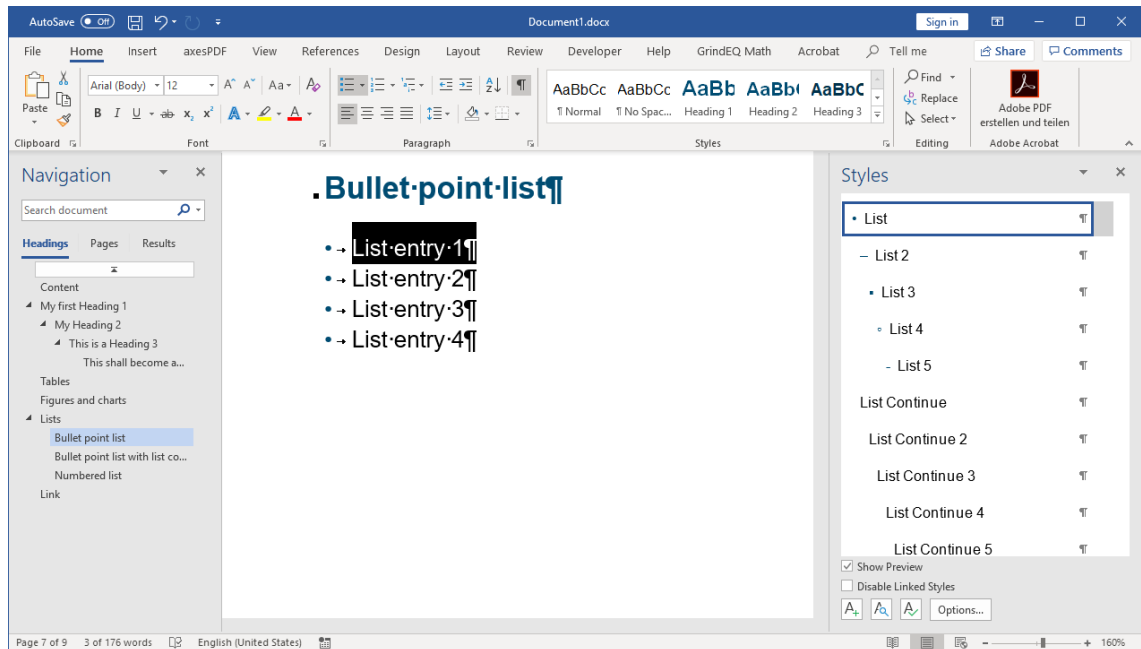
Figure 16: Simple list with bullet points

3.7.2   List Continue

When you want to add further paragraphs within one list entry (i. e. the further paragraphs belong to this list entry), assign them the paragraph style "List Continue".

Reason

After converting the document to a PDF, the list entry will have two (or more) paragraphs and will not be divided into separate lists.
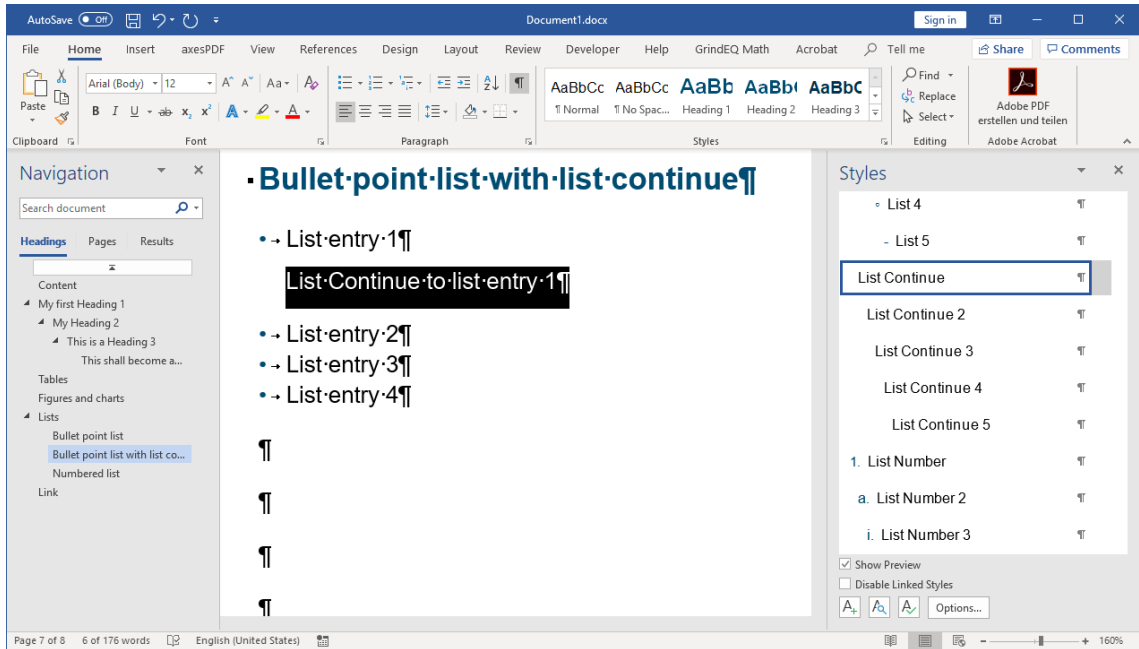
Figure 17: Simple list with bullet points and list continue

3.7.3 Multilevel lists

Type all bullet points in separate paragraphs. Then assign them the paragraph styles "List", "List 2", "List 3", "List 4" or "List 5" (for numbered lists choose the paragraph styles "List Number", "List Number 2" etc.).
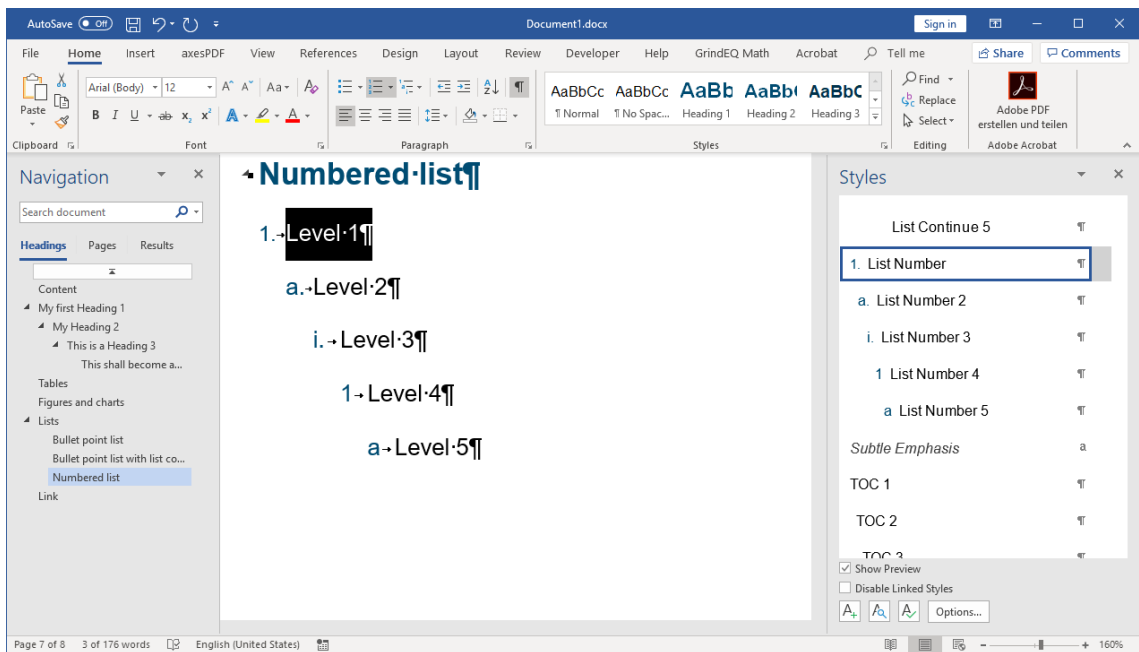

Figure 18: Multilevel numbered list

> **Tip**
>
> After you have defined the first list entry with the paragraph style "List Number" (or "List"), you can use the Tab-key for the following paragraphs of the list. Example: you have entered a list entry of level 1 and have begun a new paragraph – now you can just press the Tab-key once and write a list entry of level 2 immediately. Please take care that you do not skip one or more levels, because this would produce an illogical list.

3.8   Header and footer

Double click in the area of the header or footer. Now you can enter or edit text.
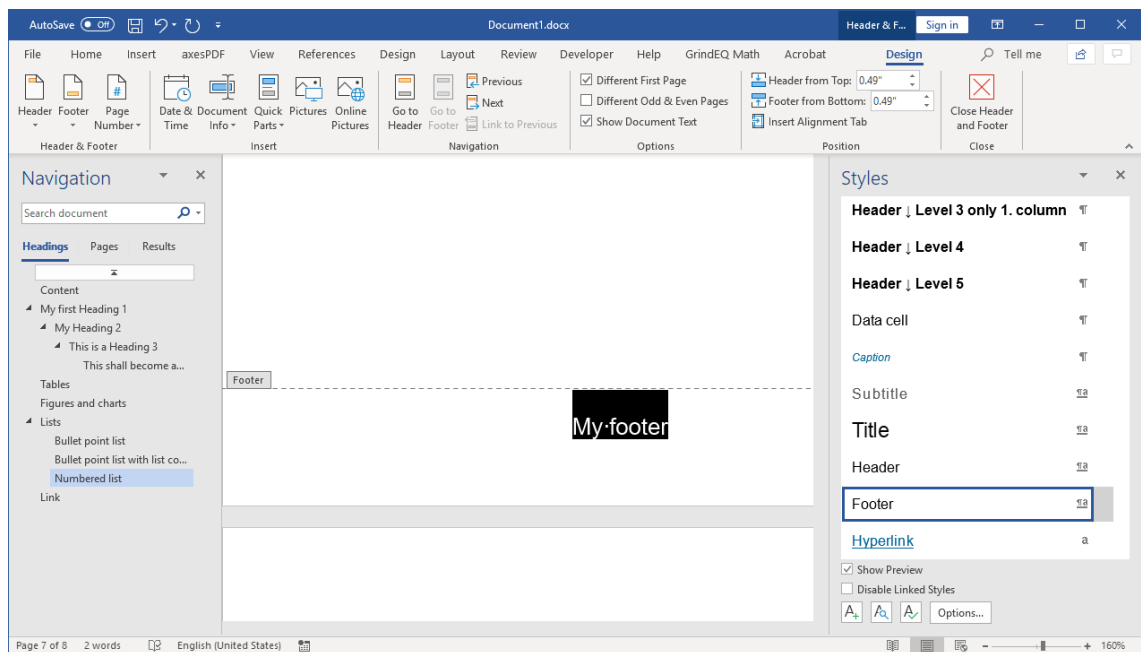

Figure 19: Edit footer

To insert the page number to the footer, click in the **COMMAND GROUP: HEADER & FOOTER** on the **BUTTON: PAGE NUMBER** and afterwards on the **BUTTON: BOTTOM OF PAGE**. Now a list opens and you can select one of the given formats.

3.9   Character styles

If you want to format single characters or words within a paragraph in a special way (e. g. colored or bold) it is very useful to have character styles defined. Character styles are applied to individual characters or words that you select. In the **TASK PANE: STYLES**, character styles have a lowercase letter "a" beside them.

First select the text parts you want to distinguish. Then click on a character style in the **TASK PANE: STYLES**, e. g. "Intense Emphasis". The selected text will be distinguished accordingly.
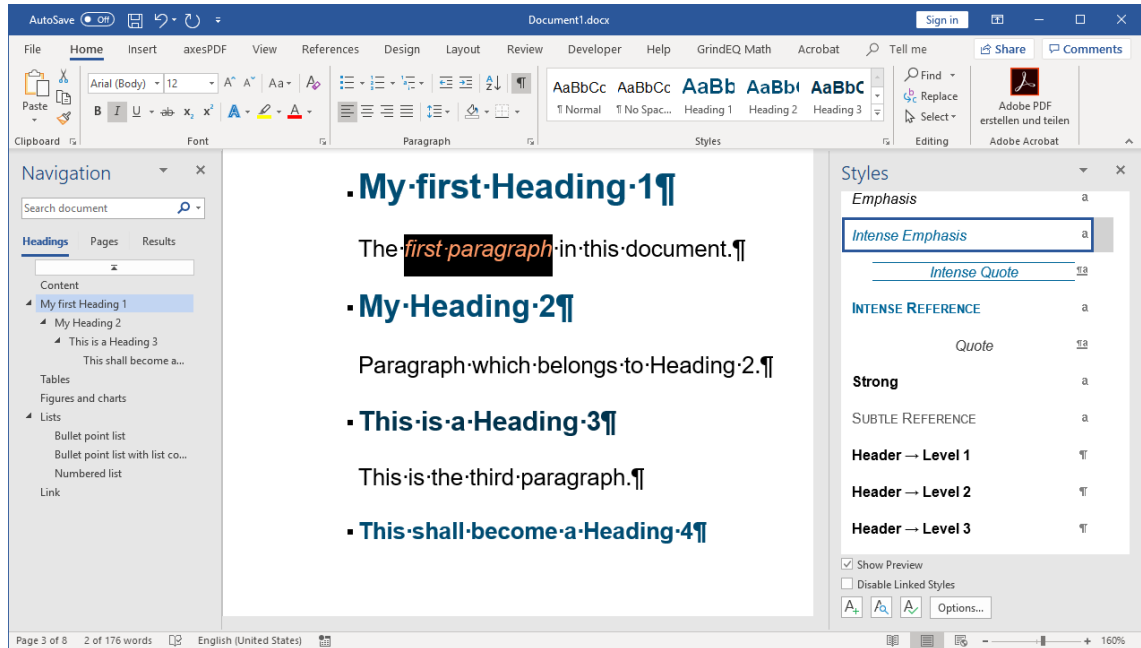

Figure 20: Character style for a selected part of the text

An advantage of character styles is, that you are able to adapt all formatted text parts in your document at once – just modify the according character style.

4 Create accessible PDF document

Click in the **RIBBON TAB: AXESPDF** on the **BUTTON: EXPORT PDF**.

Figure 21: axesWord® - Dialog window "Create accessible PDF"

In this dialog window you can change memory location, filename of the PDF, document title or main language if necessary.

Click on the **BUTTON: CREATE** to generate the PDF document.

5 Checking accessibility

You can easily check if your document is really accessible. Find a guide here:

https://support.axes4.com/hc/en-us/articles/202017888-Visual-check