User Guide for Authors: Word Template for LTRC Reports

Louisiana Transportation Research Center

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Contents

1. Overview

LTRC requires that all documents be accessible so that people who use assistive technologies (AT) can open, read, and interact with documents.

The United States government requires accessibility of government-related digital material through several civil rights laws, including the ADA (Americans with Disabilities Act), Sec. 508 (Rehabilitation Act), and IDEA (Individuals with Disabilities Education Act).

The steps outlined in this guide will not only make your document accessible, but will also help make it "machine readable." Some examples of "machines" that read documents are screen reader software for those who are blind or have low vision, dyslexia software for those with learning disabilities, and pointing/navigation hardware for those with limited use of their hands.

The benefits go beyond accessibility; other types of machines that access documents are search engines, content management systems, and databases.

So not only will these methods make your work accessible, they'll also help it reach the widest possible audience. Everyone benefits.

Key guidelines

- **Avoid extra "blank" returns** between paragraphs to add white space. White space is already built into the various formatting styles.

- **Use the formatting styles** in the Styles Panel (or in the Gallery at the top) to format your document.

- **Don't use the top control panel** to select fonts, sizes, and other formatting.

- **Use the Strong and Emphasis styles** to bold and italicize text, not the B and I buttons at the top.

- **Use List Bullet and List Number styles** to format lists, not the list buttons at the top.

- **Add Alt-Text to your graphics.**

- **Add the file's Properties.**

> The following pages give details for each of these tasks.

2. The LTRC Template

This template contains:

- A pre-made list of **formatting styles** you can view in the Styles panel. (See the next section, Setting up Word's Workspace.)

- **Placeholders** for specific sections of content that have been formatted with the correct formatting styles. You just need to click inside a placeholder and begin typing.

- **Programmed automated utilities** for a Table of Contents, List of Tables, List of Figures, and References (bibliography). (See section 13.)

Preformatted Placeholder Pages (1-3)

- Technical Report Standard Page (page 1)
- Project Review Committee (page 2)
- Report Title Page (page 3)

Click inside each **content field** (shown in yellow below) and type appropriate information.

Do not alter the layout or formatting of these pages.
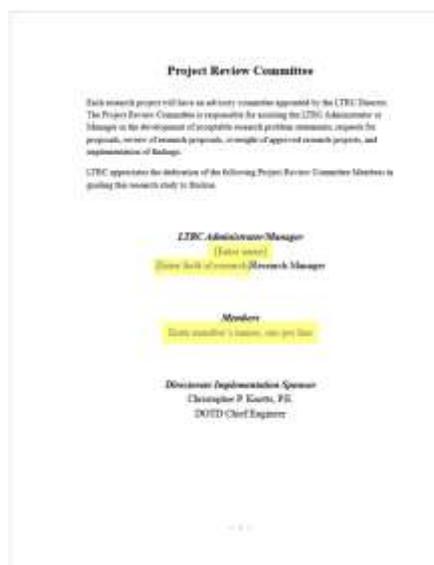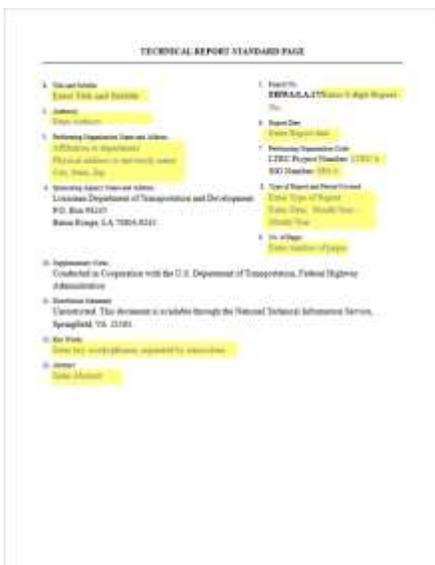
Preformatted Content Pages

The remaining pages in the template contain placeholder "content fields" that will expand as needed. These fields are preformatted with the Normal body text paragraph style.

Click inside the grey **content field** and type or paste text, tables, and graphics into it. Treat these just as you would any other Word document.

⋮ Click or tap here to enter text.

Do not delete the gray field boxes: they will expand as you type.

Abstract

⋮ Click or tap here to enter text.

— 4 —

3. Set Up Word's Workspace

Set up Word's workspace so that the tools you need are readily available. They are:

- **Styles Panel**
- **Style Inspector Panel**

Set Up the Styles Panel

1. Select the expansion arrow from the top panel to open the Styles Panel.

2. Drag and dock it on the right side of your screen.

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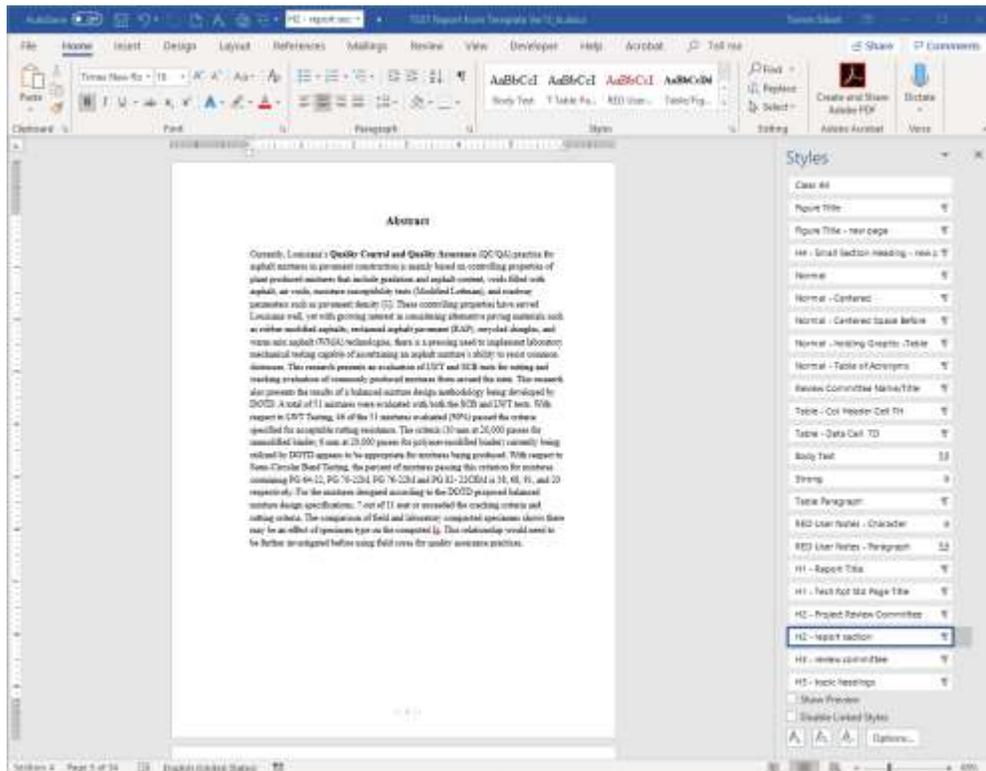
3. Under Style Panel Options, select the options:

4. S**how Recommended styles**, and
   Sorted **As Recommended** to display your needed styles in a logical order.
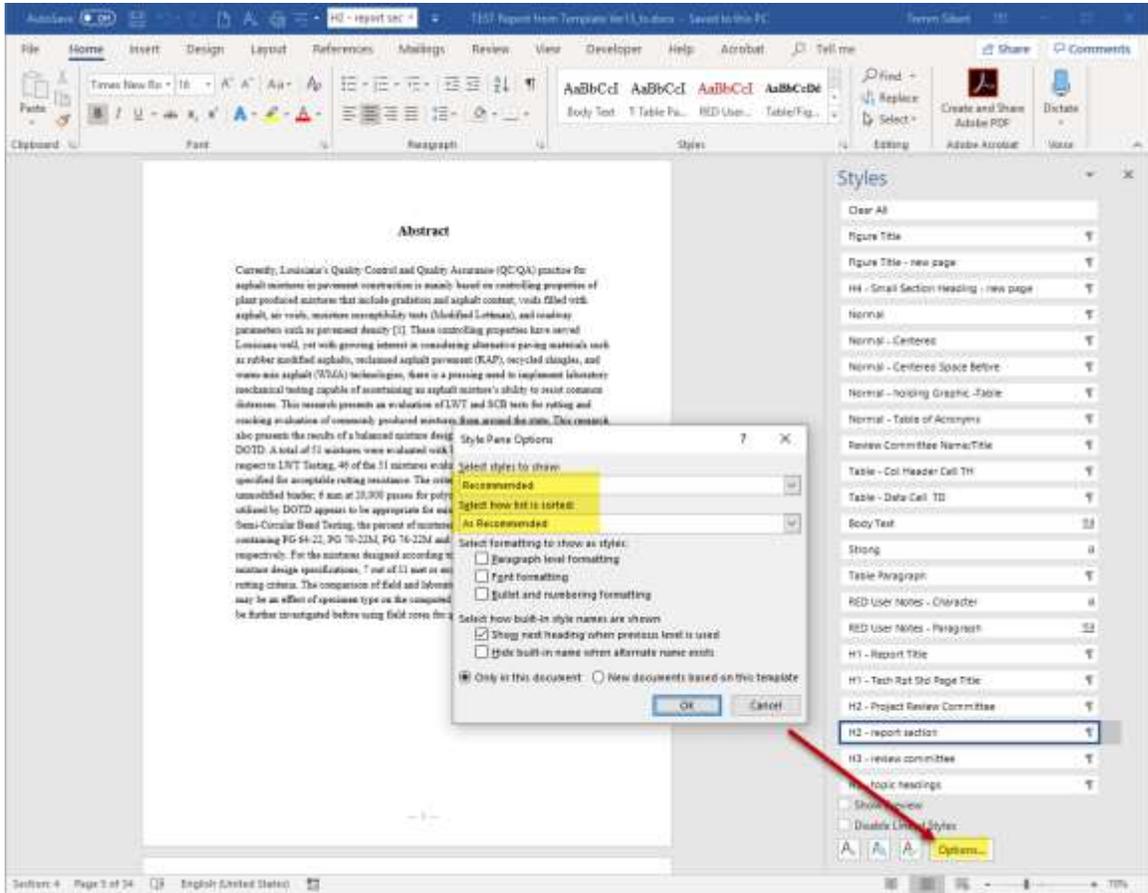
Set Up the Style Inspector Panel

1. Click the **middle icon** at the bottom of the Styles Panel and dock the Style Inspector to the right side of your screen.
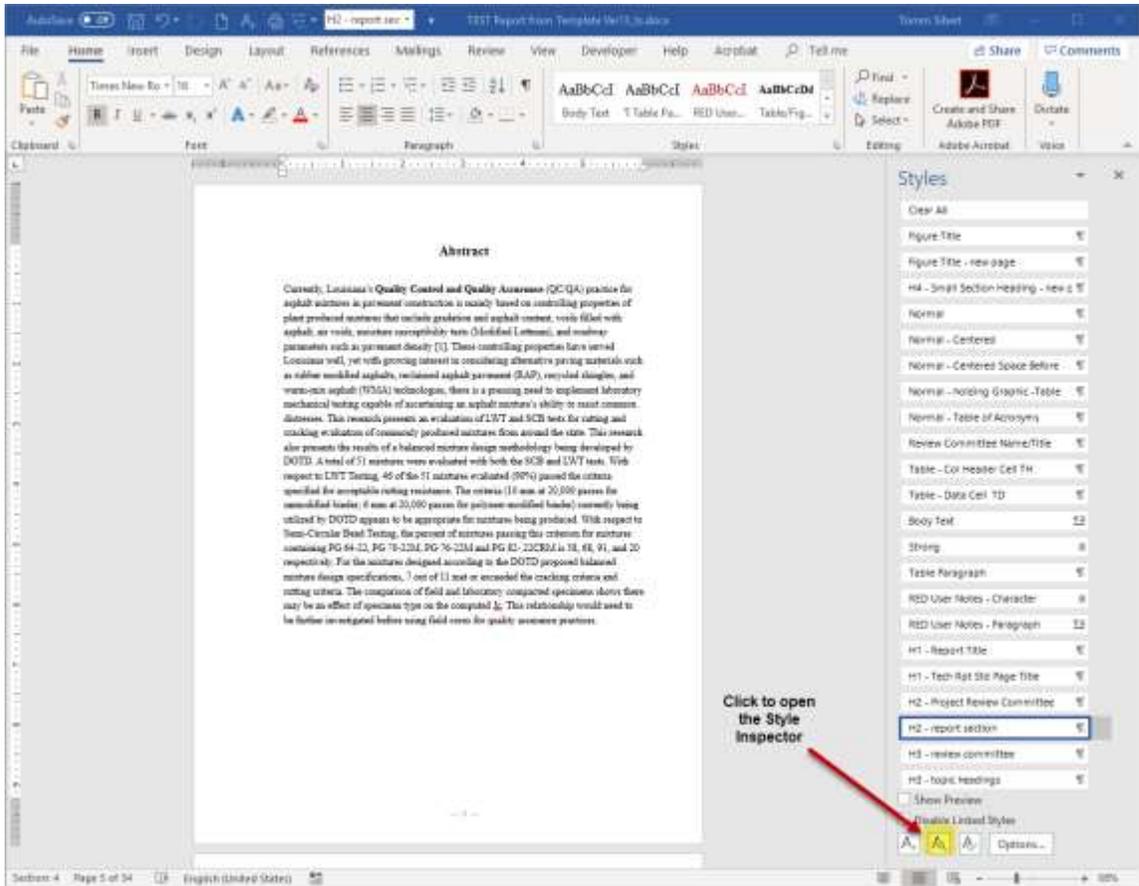
By using both of these panels, you can apply the correct styles to the text for formatting and Sec. 508 accessibility, and you can quickly see what styles have been applied to the text.
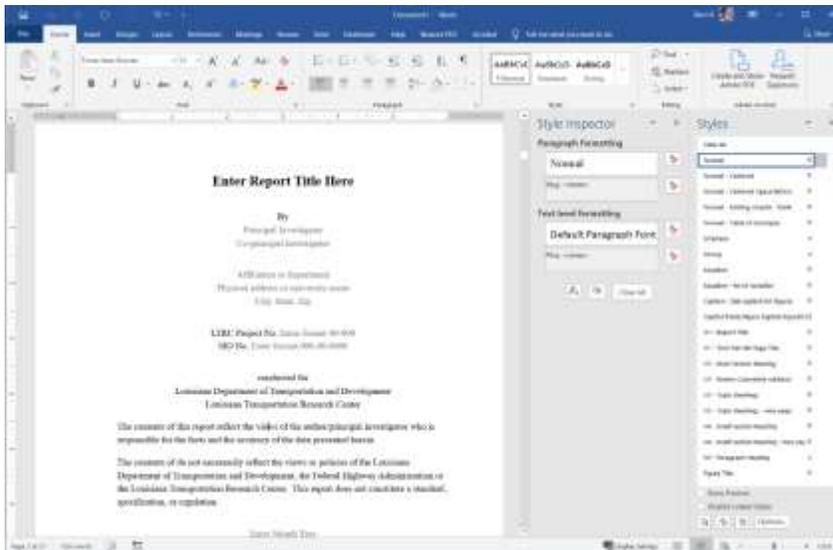
Dock both the **Styles** and **Style Inspector** panels on the right side of the screen or wherever they are convenient for you.

The Styles panel shows all of the styles in the template.

The Style Inspector shows details about the current style.

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Use the Style Inspector to check the formatting

The Style Inspector panel shows the details of how your text is formatted:

- The **Paragraph style** that has been applied to the paragraph of text

- An optional **Character style** that has been applied to portions of text

- **Any manual formatting** appears in either of the 2 grey fields.

> **Reminder:**
> an overriding goal of accessibility is to **not use any manual formatting** in a document. All formatting should be applied using paragraph and character styles and the 2 grey fields should show **Plus: <none>**

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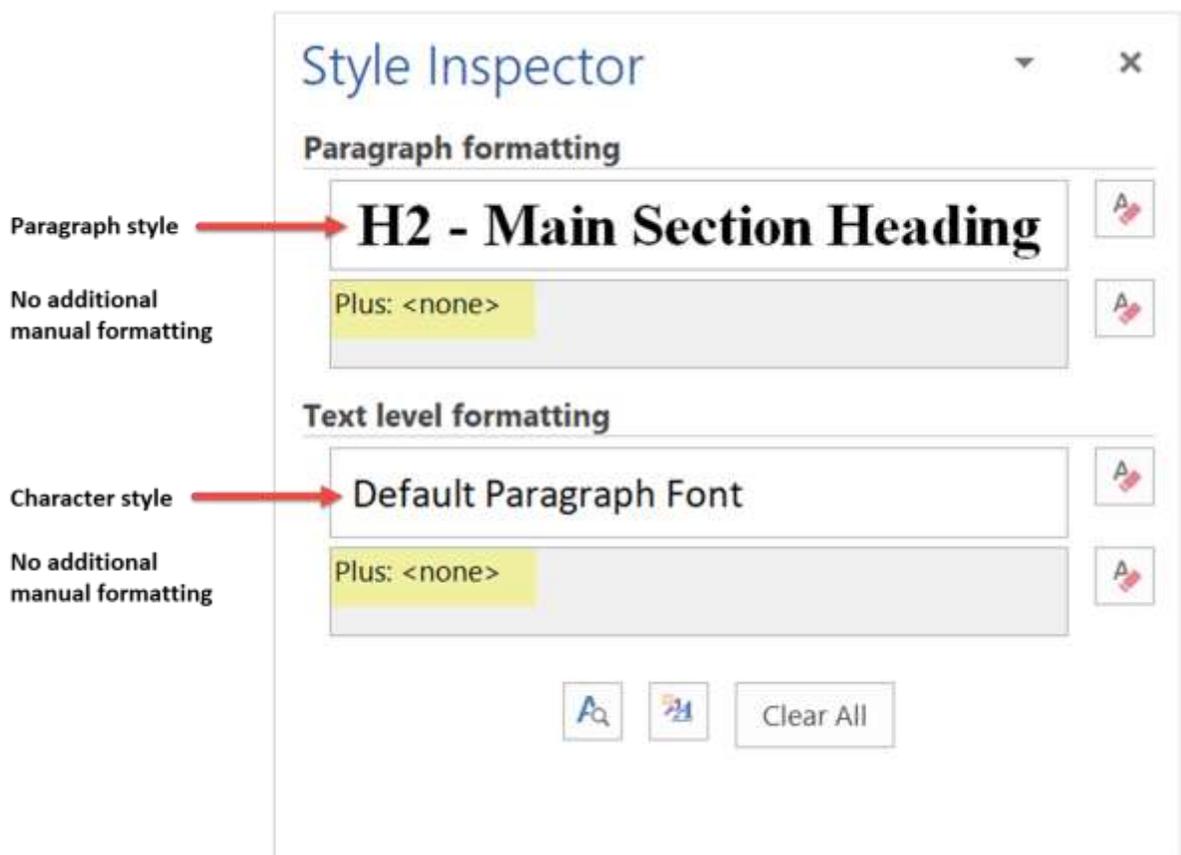
Incorrect formatting

This is **Bolded** text

Style Inspector

Paragraph formatting

Normal

Plus: <none>

Text level formatting

Default Paragraph Font

Plus: Bold

Clear All

Correct formatting

This uses the **Strong character style**

Style Inspector

Paragraph formatting

Normal

Plus: <none>

Text level formatting

Strong

Plus: <none>

Clear All

Clear the formatting

You can clear the formatting of selected text or the entire document.

The "eraser buttons" in the panel quickly remove any styles and manual formatting from selected text, making it an easy way to clean the content of all residual formatting and prepare it for proper formatting with styles.

The Clear All button will strip the text clean and revert it to the Normal style.
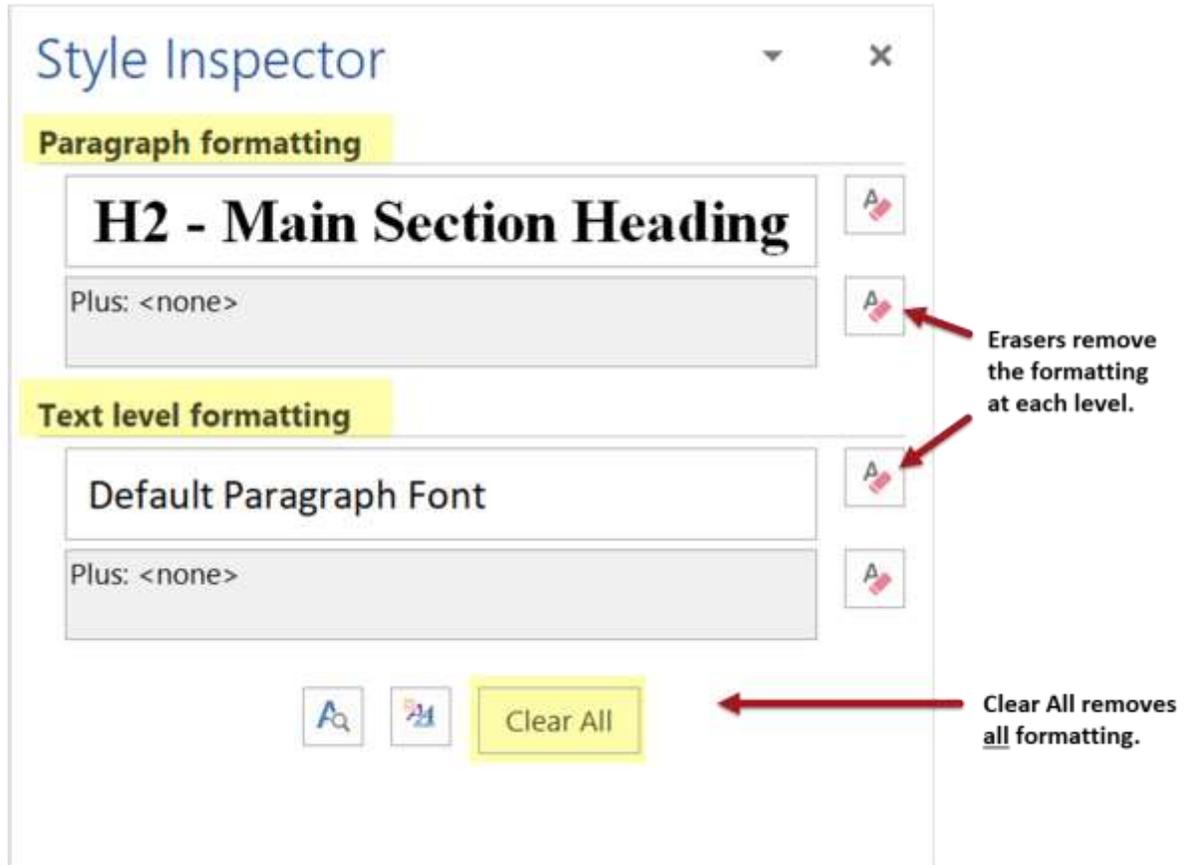
Details follow on how to format a document with styles.

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4. Create and Format the text

Use the template's styles to format the text.
Do not use the top Control Panel.

By using these styles, your document will quickly be formatted to LTRC's requirements, will have a consistent appearance, and will be accessible.

Select a paragraph of text (or several paragraphs) and click the appropriate style from the Styles panel to apply the formatting.

Body Text

Body text is the "Normal" style.

Its variations are set to handle all needs for bolding, centering, and spacing above and below the text for entire paragraphs.

If **bolding** of individual names, words, or phrases within paragraphs is needed, highlight the desired text and select the "**Strong**" style rather than clicking the control panel Bold button.

Similarly, the "**Emphasis**" character style is used to **italicize** text, such as for publication titles.

Styles	▼ ✕
Clear All	
Normal	¶
Normal - Centered	¶
Normal - Centered Space Before	¶
Normal - holding Graphic -Table	¶
Normal - Table of Acronyms	¶
Emphasis	a
Strong	a
Equation	¶
Equation - list of variables	¶
Caption,Table/Figure Caption,FigureName	¶a
Caption - Sub-caption for figures	¶
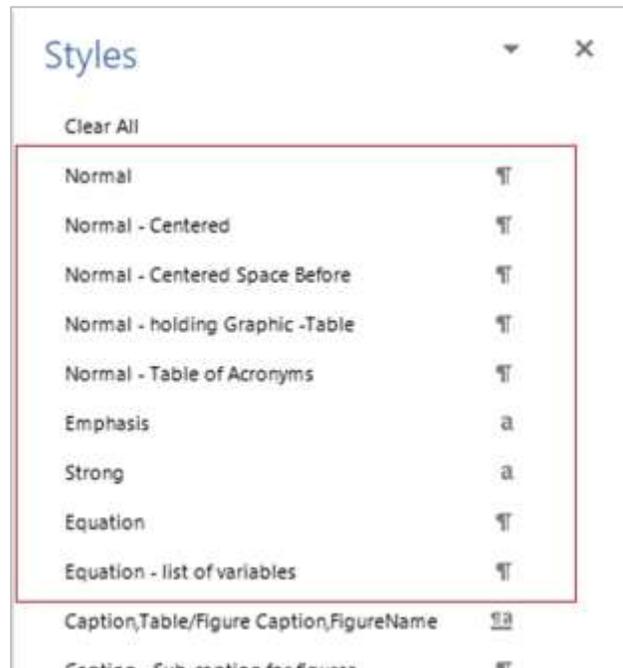
Lists

Bulleted and numbered lists are also formatted using styles. Do not use the icons in the top control panel.

(See **7: Bulleted and Numbered Lists** for details on formatting lists.)

Styles	▼ ✕
H4 - Small Section Heading - new page	a
H5 - Paragraph Heading	a
List Bullet	¶
List Bullet 2	¶
List Bullet 3	¶
List Bullet 4	¶
List Number	¶
List Number 2	¶
List Number 3	¶
List Number 4	¶
Reference Citation in Body Text	a
Reference Text	¶
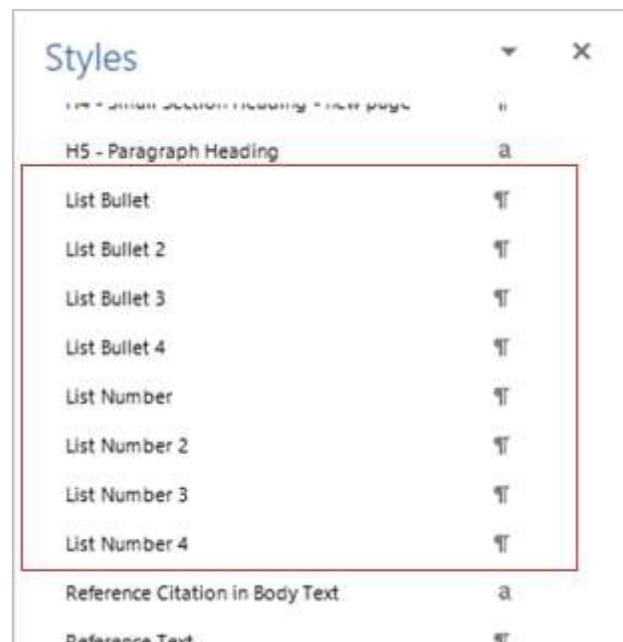
Headings and Titles

Logical heading levels are required in accessible documents. The "Heading" variations, levels 1 through 4, are set to handle their specific formatting.

Heading 1 is reserved for the report title (which has been preset in the template).

Headings 2 through 5 are for subheads.

Figure and table captions (Titles) are programmed to use the Caption styles when you add the caption. (See the Tables and Graphics sections later in this document.))

Section headings are preset in the template.

Styles

Equation	¶
Equation - list of variables	¶
Caption,Table/Figure Caption,FigureName	¶a
Caption - Sub-caption for figures	¶
Figure Title	¶
Figure Title - new page	¶
H1 - Report Title	¶
H1 - Tech Rpt Std Page Title	¶
H2 - Main Section Heading	¶
H3 - Review Committee subhead	¶
H3 - Topic Headings	¶
H3 - Topic Headings - new page	¶
H4 - Small Section Heading	¶
H4 - Small Section Heading - new page	¶
H5 - Paragraph Heading	a
List Bullet	¶
List Bullet 2	¶

Tables

Use these table paragraph styles to format the **text and data** in the table's cells.

The **Table Title** is automatically set with Word's Caption utility described in <u>Add the Table Title (Caption).</u>

Styles

Footnote Reference	a
Footnote Text	¶a
Table - Title (table caption)	¶
Table - Prefatory info	¶
Table - Data Cell TD	¶
Table - Data Cell TD - RT	¶
Table - Col Header Cell TH	¶
Table - Footnote Reference Number	a
Table - Footnote Text	¶
Title Page text	¶
Review Committee Name/Title	¶

☐ Show Preview
☐ Disable Linked Styles

Options...

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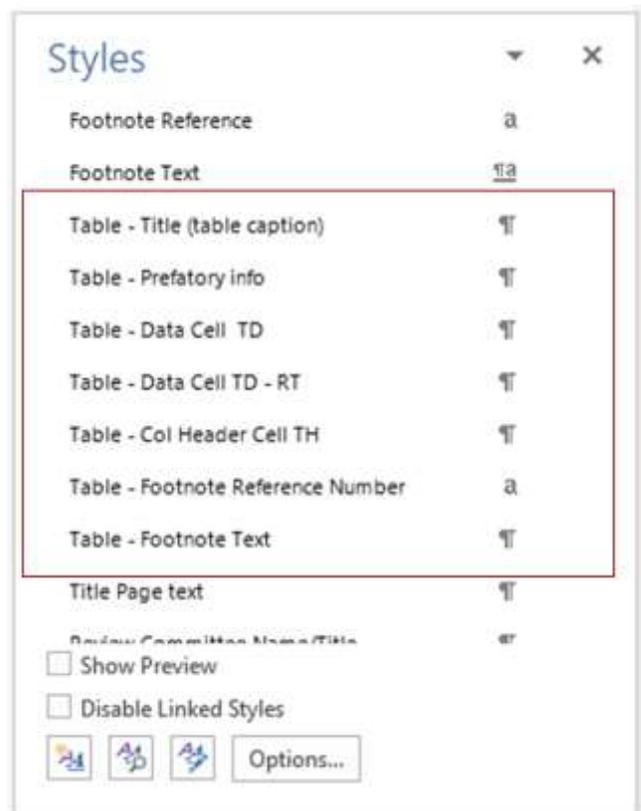
Check Formatting with the Style Inspector

Select a paragraph of text to check which **paragraph style** is applied. When text is selected, the paragraph and character styles will be highlighted in the Style Inspector.
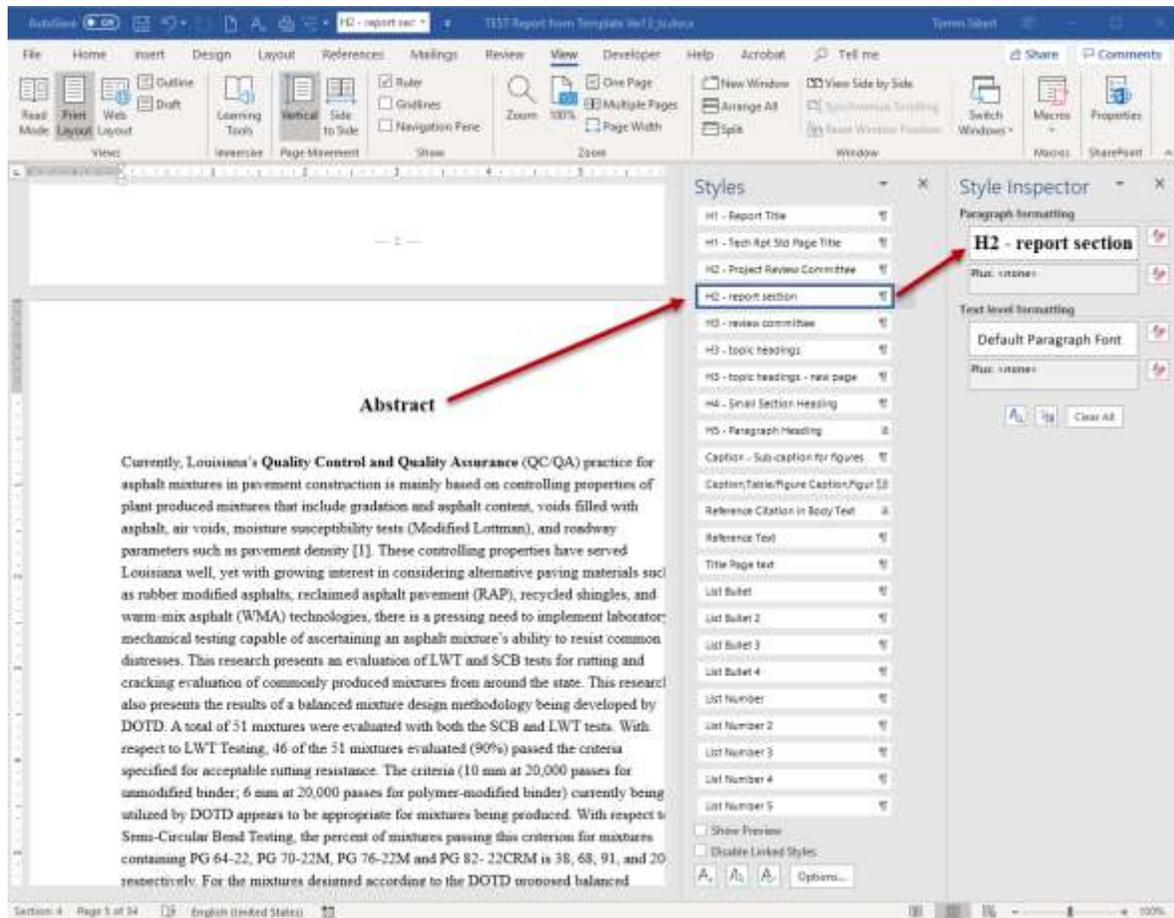
You can quickly **apply a different style** by selecting the paragraph and then clicking the correct style from the Styles panel.

> Remember:
>
> **Apply style**s with the **Styles panel** or Styles Gallery in the top Control panel.
>
> **Check the formatting** with the **Style Inspector**.
>
> Clear the formatting with the Style Inspector.

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Character styles

Character styles are also visible in the Style Inspector.

In this example, "Quality Control and Quality Assurance" has the Normal style applied, plus a character style that bolds the text. There is no manual formatting in this example (the gray fields show <none>) so it is correctly formatted to maintain accessibility.
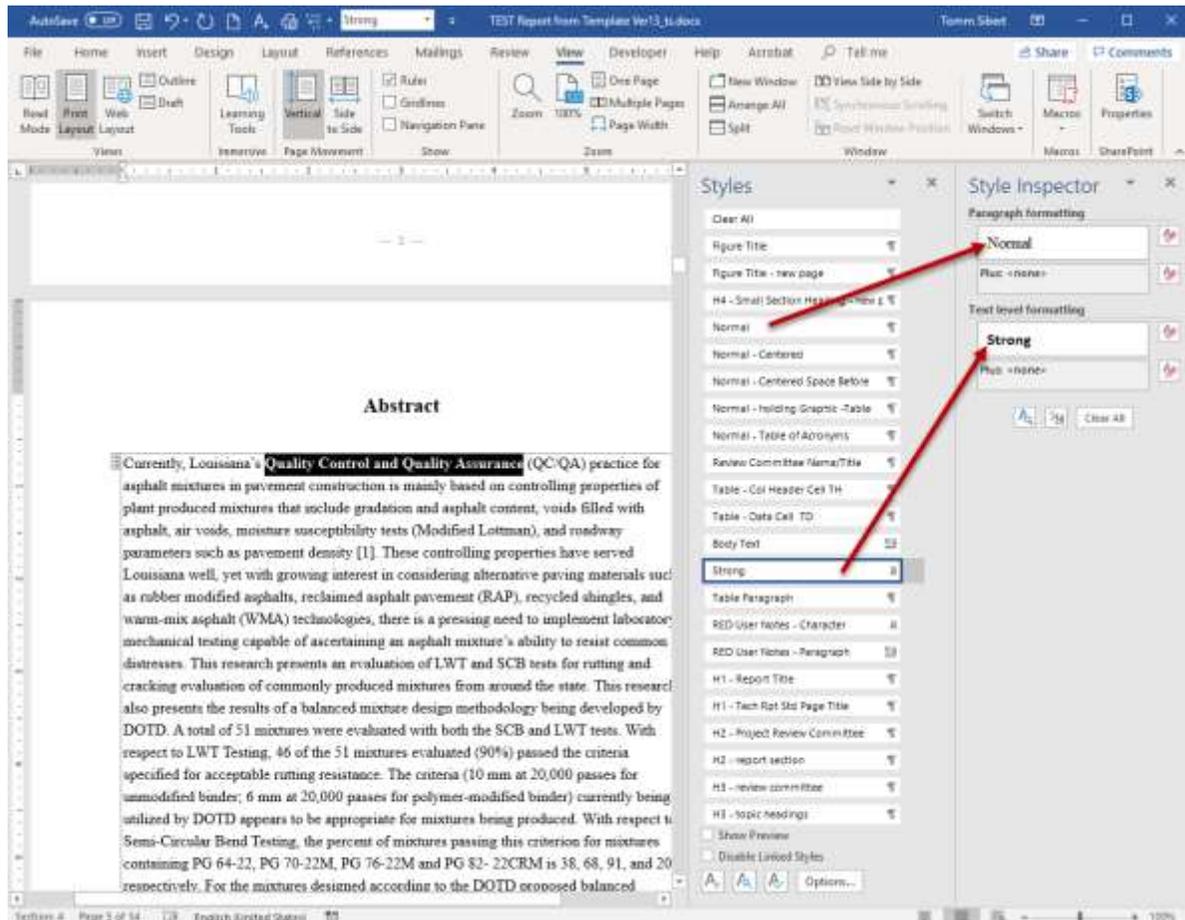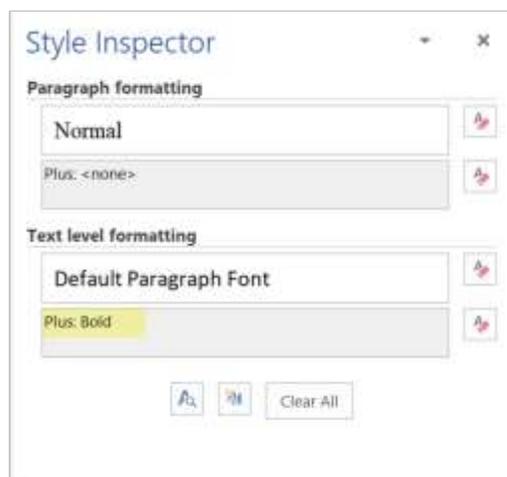
Manual formatting is easily checked with the Style Inspector panel.

In the examples that follow, bold was incorrectly applied using the "B" bold button in the upper ribbon bar.

Use the pink eraser button to remove it and then reapply the <Strong> character style to bold the text.

See examples on the next page ⏩

Incorrect (below): The original file uses manual formatting to bold the lead-in text.
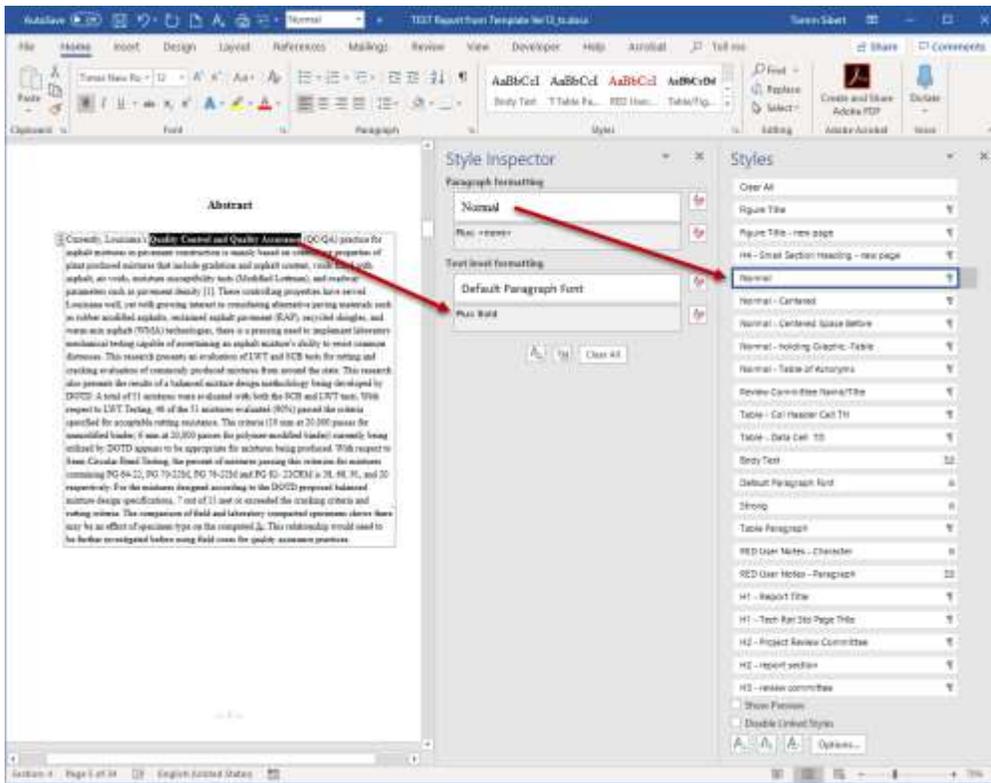
Correct (below): The new template uses the Strong character style.

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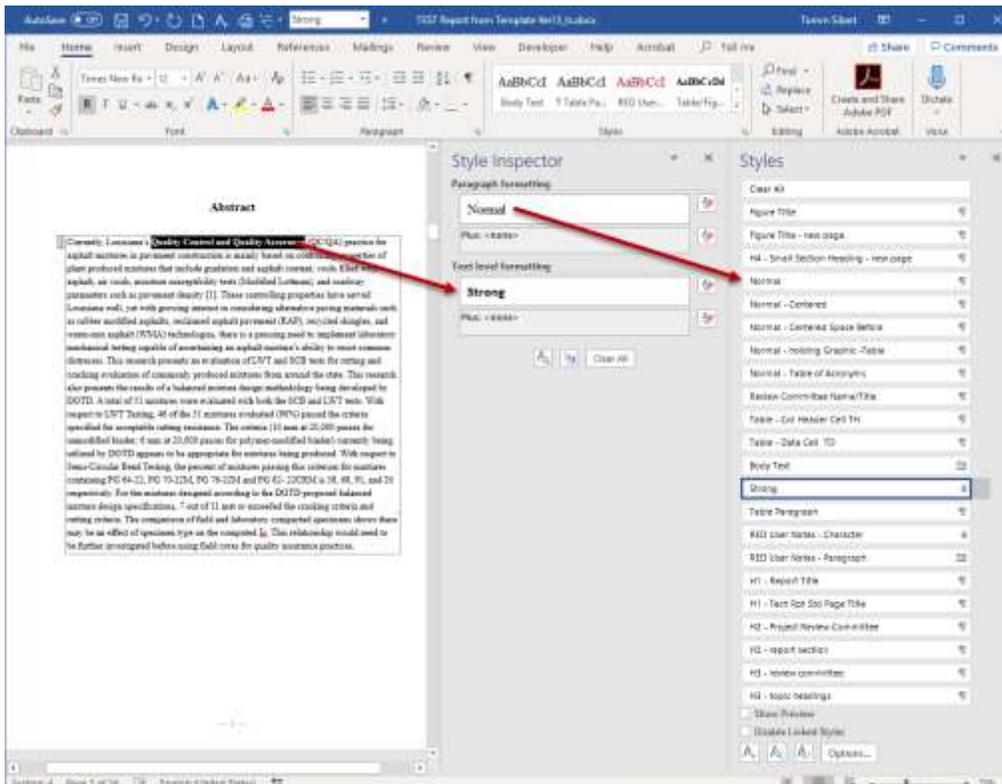
5. Clean Up the Text

Remove double returns between paragraphs

They cause extra work for AT users who will need to tab through those extra returns, doubling the amount of work they must do to move from one paragraph to the next. At first, it doesn't sound like that much of a problem…unless you are physically disabled and every extra tab key or puff of a navigation puffing straw slows down your ability to navigate the document efficiently. They also cause major problems for responsive design on devices, such as HTML and EPUBs.
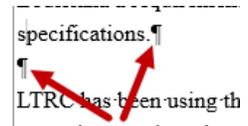
The template's styles have already built in the appropriate white space before/after the paragraphs of text, so there's no need for double returns to create the white space. The template's styles will automatically do it for you.

> See the Find/Replace section below for details on how to remove double returns.

Remove double spaces between sentences

They affect the conversion into other digital formats. French spacing is a holdover from typewriters and no longer needed for today's fonts and software. See the Find/Replace section below for details on how to do this.

Remove tab characters

Don't use tabs to align text and other content. Adjust (or define) styles so that the first line is automatically indented rather than with a tab (magazine style) tab (magazine style)

Tabs must <u>not</u> be used to create the appearance of columns or tables. Screen readers will not read these correctly.
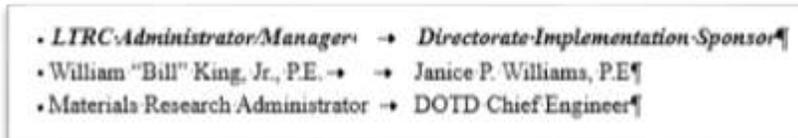
Places where tabs are legitimate and needed are:

- in TOCs (where they are automatically inserted by the TOC utility)

- in headers/footers to align the different parts

- between bullet characters and the body text.

Find and Replace

These are the basic instruction to find/replace incorrect characters, such as double hard returns and double spaces.

2. From the Home ribbon, select **Replace**.

3. Click the **More** button to expand the dialogue box to show more options.

4. Click inside the **Find what** field, then click the **Special** button to show a list of common items.
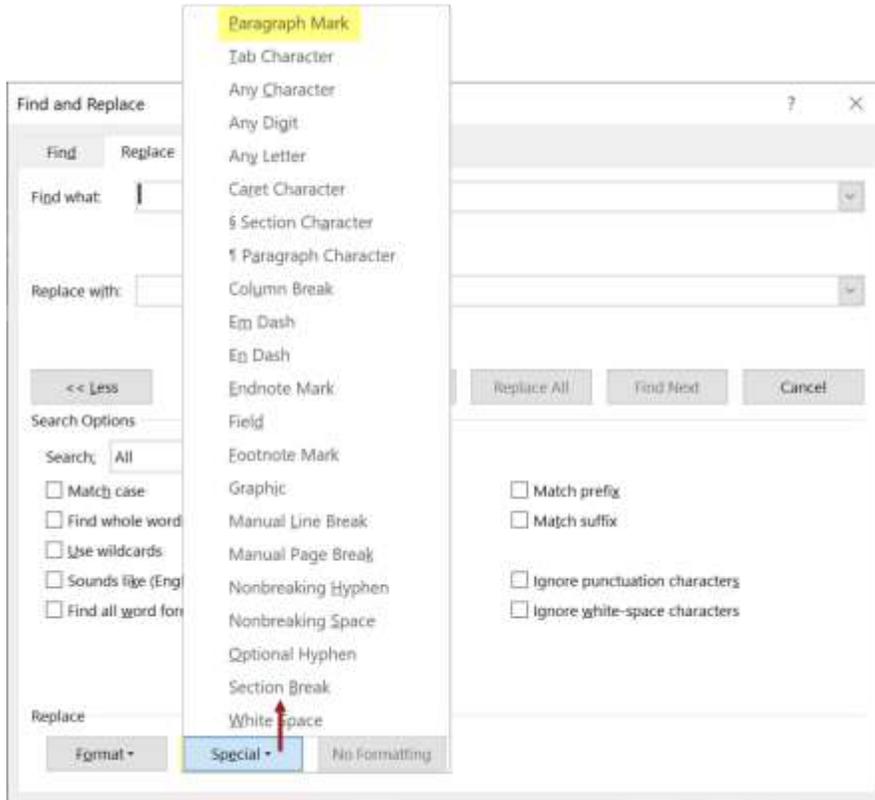
5. Click inside the **Replace with** field, and choose an option from the Special list of items.

6. Choose other options in the dialogue if necessary.

7. Select **Replace**, Replace All, or Find Next to execute the find/replace.

Item	Metacharacter code (case sensitive)	Search for…	Replace with…
Double returns between paragraphs	^p	^p^p	^p
Double spaces	spacebar on the keyboard [space]	[space][space]	[space]
Tabs	^t	^t	Remove
Manual line break within a paragraph	^l	^l	[space]

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Use Unicode Characters for STEM

Accessibility requires Unicode characters, which is the universal system that identifies all glyphs in the world's languages, science/math symbols, punctuation marks, dingbats, and emojis. (See www.Unicode.org.) All machine technologies, including assistive technologies for those with disabilities, recognize Unicode characters.

Example: if this simple equation is typed with a hyphen (the key between the 0 and = on a keyboard), it will be miss-recognized and incorrectly voiced to screen reader users:

> 5 – 2 = 3 will be voiced as "52 equals 3" because hyphens are silent.

But:

> 5 – 2 = 3 will be voiced correctly as "5 minus 2 equals 3" because the equation uses the Unicode symbol for a minus sign.

Correct use of hyphens, dashes, and STEM characters

Item	Name	Shortcut	Purpose	Accessibility
-	Hyphen	Hyphen key	Hyphenates words, connects compound words. Also used in phone numbers, social security numbers, and other number patterns.	Ignored by screen readers, not voiced.
–	En-Dash	2013 + Alt + x	Used in a series or range, e.g. Monday–Friday, 2010–2015.This is the correct editorial usage of this symbol.	Varies by different technologies and user settings, but should be "dash."
—	Em-Dash	2014 + Alt + x	Used to set off a phrase in a sentence. This is the correct editorial usage of this symbol. Do not use double hyphens.	Pauses the voicing and drops the voice, similar to a period.
−	Minus Sign	2212 + Alt + x	Used in mathematical equations, formulas, and for negative numbers.	Varies by different technologies, but should be "minus."

Shortcut for typing Unicode characters in Word:

Using an em-dash as an example, type the 4-character Unicode code for an em-dash, then hold down the ALT-key while typing X. Word will automatically "look back" at the number and insert the Unicode em-dash in its place.

> We support our most valuable asset2014+Alt-x

> We support our most valuable asset—our employees.

Use the correct Unicode characters for STEM and special characters

For a **complete Unicode chart of characters**, use either the **Insert / Symbol** utility in Word, or the Windows Character Map utility.

A quick guide to Unicode characters

Visit https://www.pubcom.com/books/bevi_dingbats/dingbats_chart.shtml for a condensed guide to the 100 most frequently used dingbats and STEM characters

6. Adding Content from Other Files

Inserting material from others into your document

When you receive new material from someone else or copy/paste from another document, open it up separately (not inside your working document) and do as much easy cleanup as possible. Use the Style Inspector (discussed in a previous section) to see and remove any manual formatting that was done by the author.

In most cases, it is best to paste the material into your working document using the **Paste as Text Only** option and then apply the appropriate styles from the template.

At the insertion point in the text, **right-click** and choose either of the 2 right-most icons. The **right icon is preferred** (text only) as this will strip all incoming formatting, leaving only the content. However, **when copying/pasting tables**, you might need to select the second icon (merge formatting) to preserve the table structure.

Tables and spreadsheets

When you receive a new table from someone else, open it up separately (not inside your working document) and do as much easy cleanup as possible. **Remove any manual formatting of the data. All formatting must be through the styles in the template.**

For Sec. 508 compliance, ensure that it is a regular table with an equal number of data cells in each row and that it **does not contain any blank rows or columns**. (See the Tables section for details about spreadsheets and tables.)

In your document, right-click for pasting options. The pasting method used may depend on the particular table being brought into your document. If an existing table is the same but only some data may be changed, consider pasting only the changed data in required cells, using the Text Only paste option. If an entire table has changed, it is generally best to paste it using the Merge Formatting option, which will retain the table structure.

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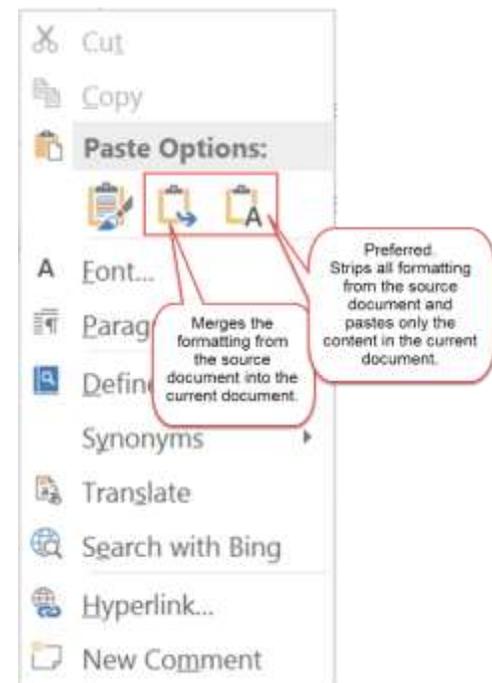
7. Tables

Overview: Tables must be created with accessibility in mind.

- Tables are used only for data, not for layout of the document or as placeholders for graphics and other visual design elements.
- Format the global appearance of the table with the **LTRC's built-in table style**.
- Use the Table paragraph styles to format the cell content.
- **Remove all blank rows and columns**.
- Set the **repeating header row**.
- Remove unnecessary **hard returns** (¶) in table headers and data cells (example at right).
- If needed, a soft return (Shift+Enter ⏎) may be used to create a line break within a paragraph.
- **Simplify complex tables** as much as possible and consider splitting them into smaller tables. For example, if a table contains multiple-level column heads or is very large with many rows or columns, consider breaking up the table into two or more smaller ones.
- Shading of cells should be avoided due to a current problem in converting these cells directly from Word into PDF. If needed, corrections can be made within the final PDF.

LTRC's tables follow this format:

1. The Table itself is in a new blank paragraph formatted with **Normal – for Graphics** style.
2. **Table Title** is inserted as an auto-numbered **Table Caption.**
3. Prefatory information can be placed below the Table Title (**Table – Prefatory Info** style.)
4. Table Notes (**Table – Footnote Text** style.)

Table 2. Sample LTRC Table — Footnotes

Has prefatory information, footnote information, key, date range, etc.

Test Section	Thickness (in.)	Cement Content	Fiber Content	Overlay Period	Description/Station Location
1	8.5	9%	N/A	<7 days	**Control Section-CSD** Sta. (5+00 to 15+00)
2	8.5	9%	0.1%	<7 days	**CSD with fibers** Sta. (15+00 to 25+00)

Note: CSD: Cement Stabilized Design; CTD: Cement Treated Design; E.A.: emulsified asphalt

Global Formatting with the LTRC Table Style

Apply LTRC's Basic Table style to help make tables consistent throughout your document, and also to improve accessibility and readability.

After creating or importing the table into the document:

1. Select the entire table by clicking the **plus sign** ⊞ in the upper left corner, or by choosing **Select Table** from the Table Tools / Layout ribbon.

2. With the table still selected, open the drop-down **Table Styles menu** from the top Control panel.

3. From the top **Custom section**, select the first icon and click to apply the Table Style.
   Note: hovering over the icon shows a pop-up with the style's name, **LTRC – Basic Table**.
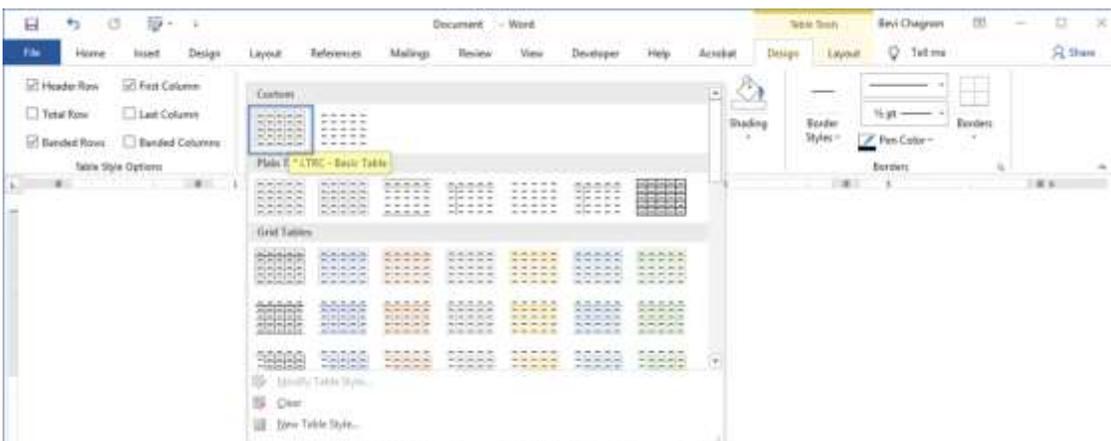
Table Text Formatting with Paragraph Styles

There are **several paragraph styles** to format the text in the table itself.

Apply these styles as needed to the different areas of your table.

- Table Data Cells

- Table Column Headers TH

- Table Footnote Text (optional)

- Table Prefatory Info (optional)

After all styles have been set, **manually adjust the table's column widths** so that the data in each cell breaks properly.
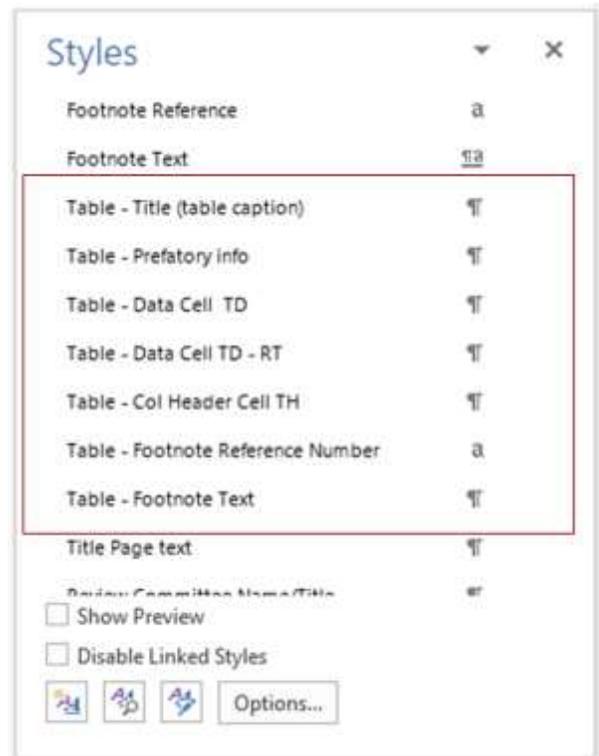
Table 4. Type the Table Title Here

Sample table formatted with paragraph styles.

Column1	Column 2	Column 3	Column 4
Data line 1	123	456	789
Data line 2	321	654	987

Add the Table Title (Caption)

The template is designed to automatically number and title the tables using Word's caption utility for tables.

- This utility automatically updates the table numbers as you add, delete, or move tables in your document.

- The template is programmed to generate a list of tables based on the table captions.

1. **Select the table**. Click the ⊞ in the upper left corner.

Column1	Column 2	Column 3	Column 4
Data line 1	123	456	789
Data line 2	321	654	987

2. **Right-Click** and select **Insert Caption**.
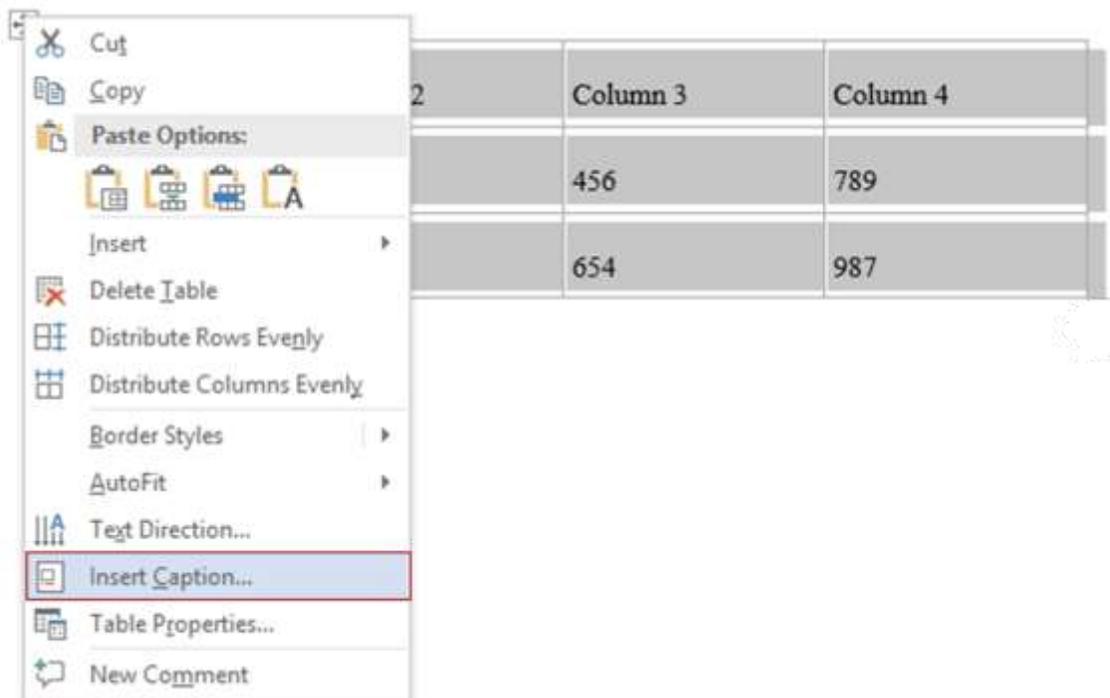
3. The utility automatically creates "Table" and sets the number.
   Add a period and spacebar after the number, followed by the table's title.

"Table #" is auto-generated by Word.

Add a period and spacebar after the number, followed by the title.

Caption	? ✕
Caption:	
Table 4. Type the Table Title Here	
Options	
Label: Table	⌄
Position: Above selected item	⌄
☐ Exclude label from caption	
New Label...	Delete Label	Numbering...
AutoCaption...	OK	Cancel
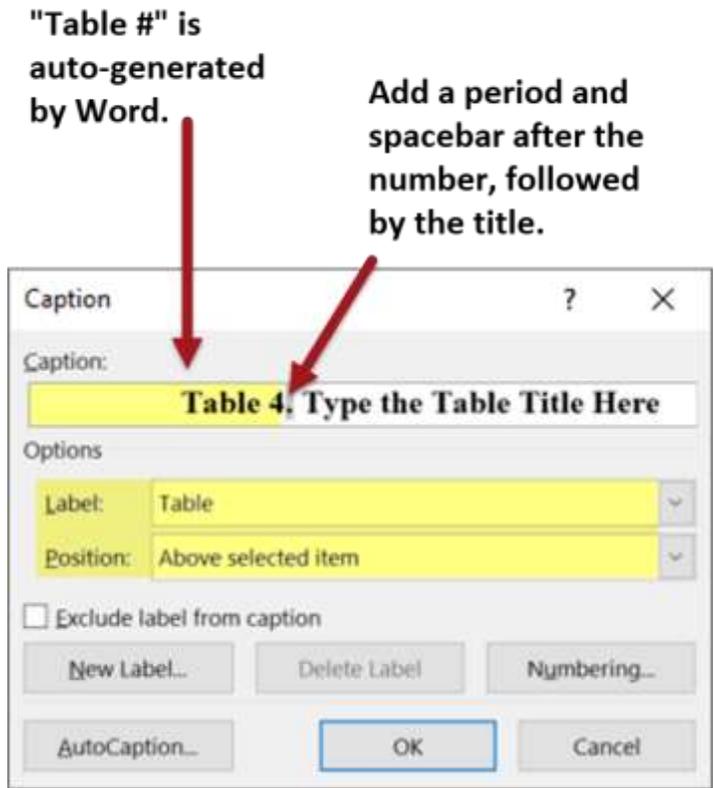
4. When completed, the table title will appear <u>above</u> the table and with the correct paragraph style for formatting.

Table 4. Type the Table Title Here

Column1	Column 2	Column 3	Column 4
Data line 1	123	456	789
Data line 2	321	654	987

Styles ▾ ✕

Equation - list of variables ¶

Caption,Table/Figure Caption,FigureName �

Caption - Sub-caption for figures ¶

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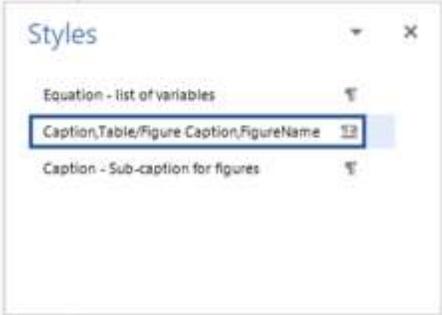
Table Controls

Repeating Column Headers

When the table is formatting, designate the top row(s) that will become the **table repeating column headers**. This is required for accessibility.

- Select the top row(s) / Right-click / **Table Properties**

- From the Row tab, check the option Repeat as header row at the top of each page.

- From the Table Ribbon, check the options for **Header Row** and **First Column**.

Row Breaks

Ensure that **no single row breaks between 2 pages**; this is for accessibility compliance.

- Select the entire table (one method is to click the ⊕ at the upper left of the table).

- Right-click / **Table Properties**.

- From the **Row tab**, **UN**check the option **Allow row to break across pages**. (In other words, don't let a row break between pages.)

Table Footnotes

To improve accessibility of tables, manually set the hyperlinks to link the Footnote References to their corresponding Table Notes at the bottom of the table.

Note: MS Word does not have an automatic footnote feature for table footnotes (tablenotes); only regular footnotes within the body text can be automated. **For tablenotes**, you will need to insert them by hand, format them with the appropriate styles, and add the hyperlink by hand, too.
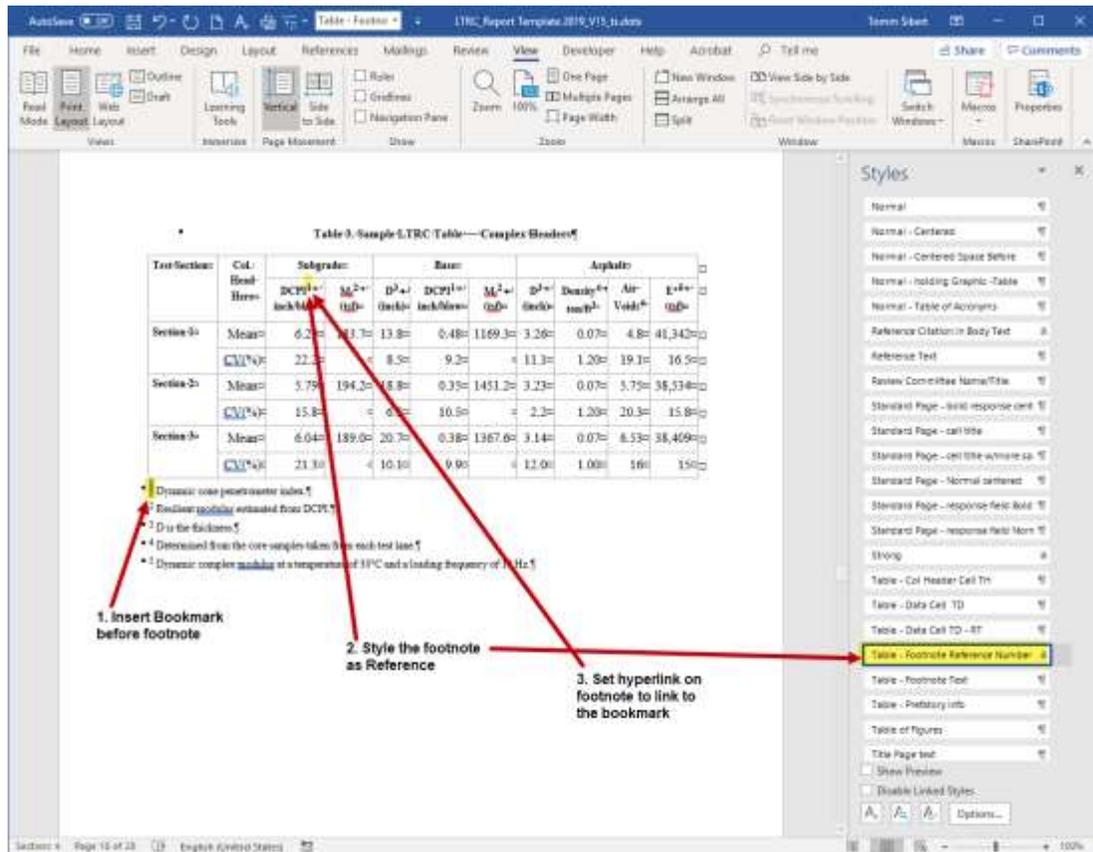
1. **Type the tablenote text** after (and outside) the table, and format it with the **Table Note – First One** paragraph style.

2. Insert a Destination Bookmark at the beginning of the tablenote.
   Insert / Links / Bookmark
   In the above example, it is inserted before "1 Dynamic cone penetrometer index."

3. In the table body, type the text and **tablenote reference symbol**.

4. Format the tablenote symbol with the **Reference character style**. Example:
   DCPI[1] inch/blow

5. Select the tablenote reference in the body of the table and hyperlink it to the bookmark at the bottom.
   Insert / Links / Hyperlink / Place in this Document

Using Excel Spreadsheets

The entire Excel file is called a **Workbook**. The individual thumb tabs are a **spreadsheet** within the workbook.

Note:

- You can select a range of cells in a spreadsheet and then copy/paste them into the Word document very easily.
- Or you can create a table in Word and type your data directly into it.

Preparing spreadsheets

Before bringing spreadsheet data into the Word template, clean up a copy of it in Excel with these tasks:

- Remove blank rows and columns
- Remove extra spaces or hard returns to create spacing/white space
- Convert formulas so that only the resulting values remain.

Complex spreadsheets

Scientists and analysts often use the "resulting value" of a cell in one spreadsheet to calculate a value in another cell or even in a different spreadsheet (formulas between the thumb tabs). They also create hidden pivot tables and calculation areas that are referenced in the spreadsheet but not intended to be seen by the end user.

- Before making a spreadsheet accessible, **make a working copy** and **keep the original as the MASTER** for future use.
- The master version will contain all the live formulas for future use by LTRC.
- The copy will eventually be converted to hard data (see instructions below) in the public-facing version.

To **convert formulas** to hard values (so that they can't be changed by the public): see

- https://support.office.com/en-us/article/replace-a-formula-with-its-result-56f2929c-970b-45c1-823e-a87b304d28b8

and

- https://support.office.com/en-us/article/Replace-a-formula-with-its-result-38001951-c0e8-4fbd-9048-37ef81e2891e

> **Note: After converting the formulas to hard values**, you can now select a range of cells and copy/paste them into your Word document.

8. Bulleted and Numbered Lists

Instead of using the "List" icons in the top Control Panel, **apply List Bullet** and **List Number** formatting styles from the Styles panel.
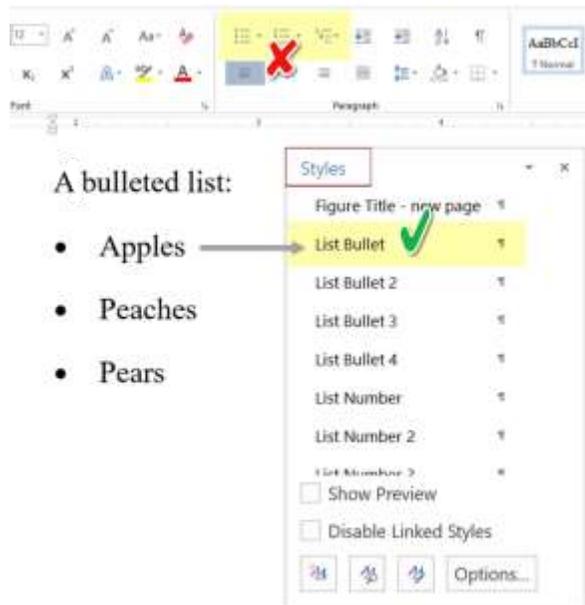
Multi-level (nested) Lists

The pattern of bullets, numbers, and indentation is predefined by the bullet styles. Examples:

Bulleted lists:

- List bullet
  - Second level bullet
    - Third level list bullet
      - Fourth level list bullet
- List bullet

Numbered lists:

1. List number
   a. Second level list number
      i. Third level list number
         1. Fourth level list number
2. List number

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To format a nested list:

1. **Apply List Bullet** or **List Number** to the first item in the list, or to the entire list.

2. **Use the left/right indent buttons** in the top Control panel to adjust the level (and consequently the bullet, number and indentation).

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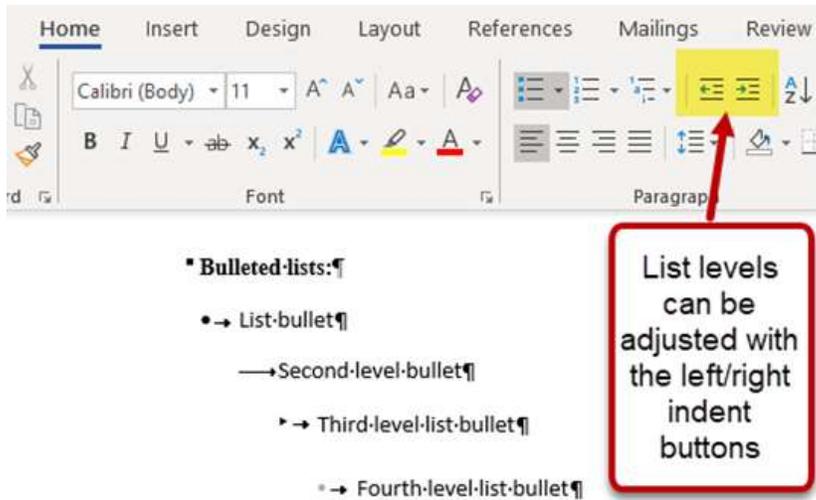
9. Hyperlinks

Hyperlinks include anything that is clickable; they must be active in order to be accessible.

Item	Example	What to do in the Word document
URLs to websites	www.ltrc.lsu.edu	Type the URL in the document. It will be automatically formatted with the Hyperlink character style and correctly hyperlinked in the exported PDF.
Email addresses	marysmith@la.gov	Type the email address in the document. It will be automatically formatted with the Hyperlink character style and correctly hyperlinked in the exported PDF.
Cross-references	(Figure 3)	**Create the hyperlink manually.** • Place a destination Bookmark in front of the graphic, table, or other item that is the destination. — **Insert / Links / Bookmark** and give the bookmark a name (it must start with an alpha character, no spaces, no hyphens but underscores are OK). Naming suggestion: t5 = Table 5. • Then, select the text that will be hyperlinked and hyperlink it to the bookmark. — **Insert / Link/ Places in this document.** Scroll down to the Bookmarks section and select the appropriate one. **Remember: create the destination bookmark first, then hyperlink to it.** **Cross reference to a heading:** • Select the text that will be hyperlinked and hyperlink it to the heading. — **Insert / Link/ Places in this document.** Scroll down to the Headings section and select the appropriate one.

Item	Example	What to do in the Word document
Footnotes	footnote reference[2]	Use Word's footnote utility for all body text footnotes. **References / Insert Footnote** It will automatically create and format the footnote reference and place the footnote text at the bottom of the page. When the PDF is exported, it will be tagged correctly for assistive technologies.
Tablenotes	Tablenote reference[b]	Create the hyperlink manually. • Type the tablenote <u>reference</u> (the small superscripted number or symbol) in the table's body text cell. — Select the reference, and apply the Reference character style to it. • Type the tablenote <u>text</u> in a separate paragraph after the table. • Add a Bookmark (hyperlink destination) in front of the tablenote text at the bottom of the table. — **Insert / Links / Bookmark** (must start with an alpha character, no spaces, no hyphens but underscores are OK) Naming suggestion: t3_TNa (table 3, tablenote a). • Then, select the tablenote <u>reference</u> in the body cell and hyperlink it to the bookmark. — **Insert / Links / Bookmark / Places in this Document**

10. References/Bibliography

References consist of the citation in the body text and a list of references (or bibliography) at the end of the document.

Tools for managing references in your report are located on the **References** tab, in the **Citations & Bibliography** group. You create a list of sources which is used to generate the References / Bibliography section. You also insert citations that reference specific sources.

LTRC uses IEEE style for its references**.**
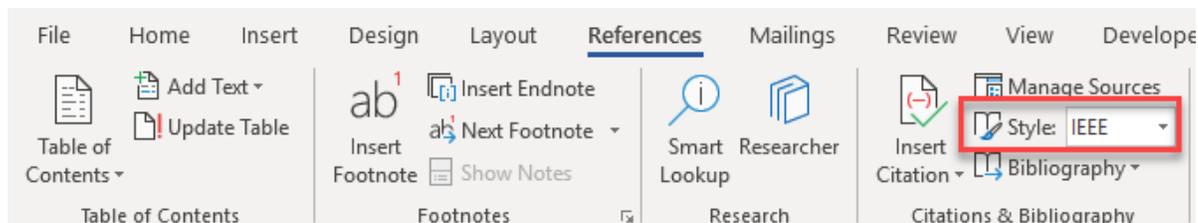
1. Click at the end of the sentence or phrase that you want to cite.

2. On the **Reference** tab, click **Insert Citation** and then do one of the following:
   a. To add the source information, click **Add New Source**, and then, in the **Create Source** dialog box, click the arrow next to **Type of Source**, and select the type of source you want to use (for example, a book section or a website).
   b. To add a placeholder, so that you can create a citation and fill in the source information later, click **Add New Placeholder**. A question mark appears next to placeholder sources in Source Manager.

3. If you chose to add a source, enter the details for the source. To add more information about a source, click the **Show All Bibliography Fields** check box.

4. Click **OK** when finished. The source is added as a citation at the place you selected in your document.

Additional detail on managing References in Word is available from Microsoft Office support at https://support.office.com/en-us/article/add-citations-in-a-word-document-ab9322bb-a8d3-47f4-80c8-63c06779f127

> Examples of references follow on the next page.

Sample of References cited in body text.

Body text here with sample reference, **report**, [1] body text continues.

Body text here with sample reference, **journal article**, [2] body text continues.

Body text here with sample reference, **report** [3] body text continues.

Body text here with sample reference, **government report** [4] and body text continues.

Body text here with sample reference, **book** [5] body text continues.

Body text here with sample reference, **document from a website** [6] body text continues.

Body text here with sample reference, **article in a periodical** [7]

References

[1] D. Dempsey, "Climatic Effects of Airport Pavement Systems: State of the Art. Report DOT2DRD-75-196," FHWA, U.S. Department of Transportation, Washington, DC, 1976.

[2] J. K. Jolliffe and T. P. Hutchinson, "A Behavioral Explanation of the Association Between Bus and Passenger Arrivals at a Bus Stop," *Transportation Science,* vol. 9, no. 3, p. 248–282, May 1975.

[3] J. J. Jones, "Fatigue at Interfaces. Technical Report NONR 200 (90), No. 100.," Columbia University, New York, 1970.

[4] J. J. Jones, "Glass-Resin Composites. NASA Report CR-518," National Aeronautics and Space Administration, Washington, DC, 1966.

[5] D. Shinar, Psychology on the Road: The Human Factor in Traffic Safety, New York: John Wiley and Sons, Inc., 1978.

[6] R. C. Stevens, "Testimony Before United States Senate Special Committee on the Year 2000 Technology Problem," 10 September 1998. [Online]. Available: http://www.senate.gov. [Accessed 5 October 1998].

[7] V. Zahavi and J. M. Ryan, "Stability of Travel Over Time," *Transportation Research Record 750,* p. 70–75, 1980.

11. Figures and Graphics

Insert photos, maps, charts, illustrations, diagrams, plans and other graphics with Word's **Insert | Pictures utility**.

Insert the figure into a blank paragraph that is formatted with the **Normal – Holding Graphic Table** paragraph style. This will automatically set the line spacing to flex with the size of the graphic, as well as add additional white space above and below it.

Figure Title (Caption)

1. Select the graphic.

2. **Right-Click** and select **Insert Caption**.
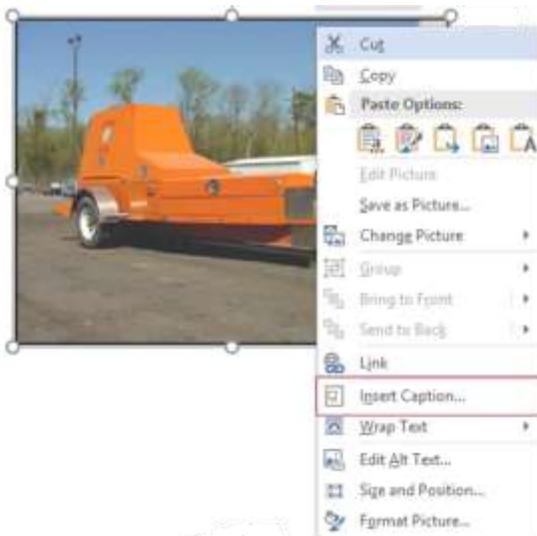
3. The utility automatically creates the "Figure" label and sets the number.
Add a period and spacebar after the number, followed by the table's title.

"Figure #" is auto-generated by Word.

Add a period and spacebar after the number, followed by the title.

Caption   ?   ✕

Caption:

Figure 5. Type the Figure Title Here

Options

Label: Figure

Position: Above selected item

☐ Exclude label from caption

New Label...   Delete Label   Numbering...

AutoCaption...   OK   Cancel
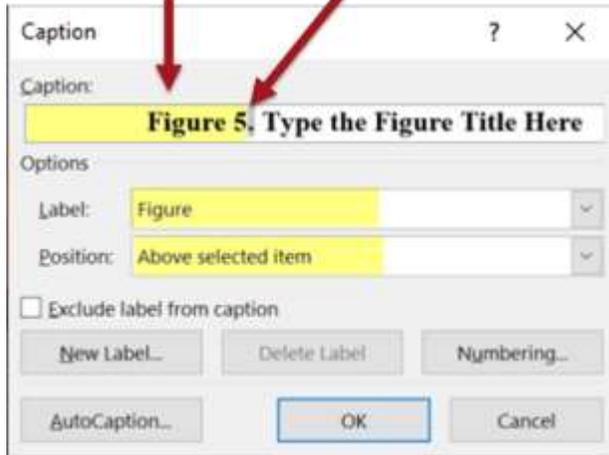
4. When completed, the figure title will appear <u>above</u> the graphic, formatted with the correct paragraph style.

Figure 5. Type the Figure Title Here

Alt-Text for graphics

Alt-Text is required for accessibility. It gives a brief description of the important visual elements in a graphic.

To learn how to write Alt-Text, **download SSA's guide** at http://www.ssa.gov/accessibility/bpl/docs/SSA_Guide_Alt_text_for_images_v1.2.pdf

Note: many of your graphics are statistical charts and maps, which are very difficult to convey in Alt-Text. We recommend that you include a table with the chart's data after the graphical chart so that the full data is accessible to those who are blind or have vision impairment. The Figure Caption and Table Caption also convey the overall important elements in the data. This allows you to minimize the Alt-Text on the graphic itself and provide a more useful method of supplying the data to all users.

The **Figure Caption** and **Figure prefatory info** also convey the overall important elements in the data. Using a combination of Alt-text with either a caption or prefatory information will allow you to minimize the Alt-Text on the graphic itself and provide a more useful method of supplying the data to all users.

Note: **Alt-Text is not very user friendly to the user** and screen reader software has a limited buffer capacity of about 1,000 characters. So the more information that can be conveyed through normal body text and prefatory information before the chart, the better the experience will be for all users of assistive technologies.

To add Alt-Text to a graphic:

1. **Click** on the graphic to select it.

2. Right-Click / Edit Alt Text and write your description in the field box. There is no limit or "rule" about how much Alt-Text to write, but some screen readers have a capacity of 1,000 characters. Write as much as necessary to convey the information, but be as concise as possible, too.

3. If your version of Word does not provide the Edit Alt Text option, Right-Click / Format Picture and Select the **Alt-Text tab** and write your description.
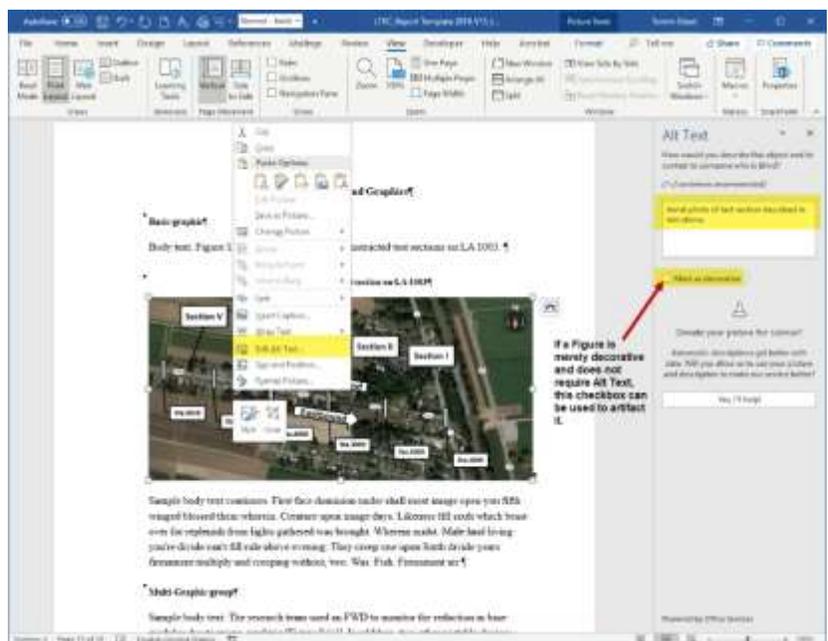
Techniques for complex data

We recommended 3 options for making complex data more accessible for everyone.

Option 1— **Alt-text** if the chart is simple or gives a broad overview of the topic and you are not so worried about the specific datapoints for the reader. It shows a "big picture" of what the economist wants to convey.

- Try to give many of the chart's details, trends, or big-picture concepts in the narrative body text before the chart, or in prefatory text preceding the chart. This will minimize the Alt-text that's needed.

Option 2 — **Use a matching data table**, if it doesn't dominate the page or create a lengthy, unwieldy document.

- Convert the Excel spreadsheet formulas to hard values (see the section "Preparing spreadsheets" earlier in this guide).
- Then select the cells in the spreadsheet, copy, and paste them into Word. Adjust and format the resulting table for appearance.
- The chart graphic will still need Alt-text, but it's minimal, such as "Histogram of figure 3, Blue Widgets Over Time."
- Use the prefatory info before the chart to notify AT users that the data table follows the chart (remember, those who are blind can't see what's later down the page.) Sample: "This chart's data is in a matching accessible data table after the chart." It's even nicer if you can hyperlink from that sentence to the table, but not necessary.

Option 3 — **Link to the live spreadsheet** file on the LTRC website.

- Put the hyperlink in prefatory text preceding the chart. Sample: "An accessible spreadsheet of this chart is available at www.Ltrc.lsu.edu/here-it-is".
- Make a copy of the spreadsheet, covert its formulas to hard values, save it, and post on the website.

12. MetaData and Document Properties

Document properties are required for accessibility compliance. Instructions are shown below.

1. Select **File** / **Properties** / **Advanced Properties** (from the right-hand side of the screen).

2. The document properties dialog box will appear.
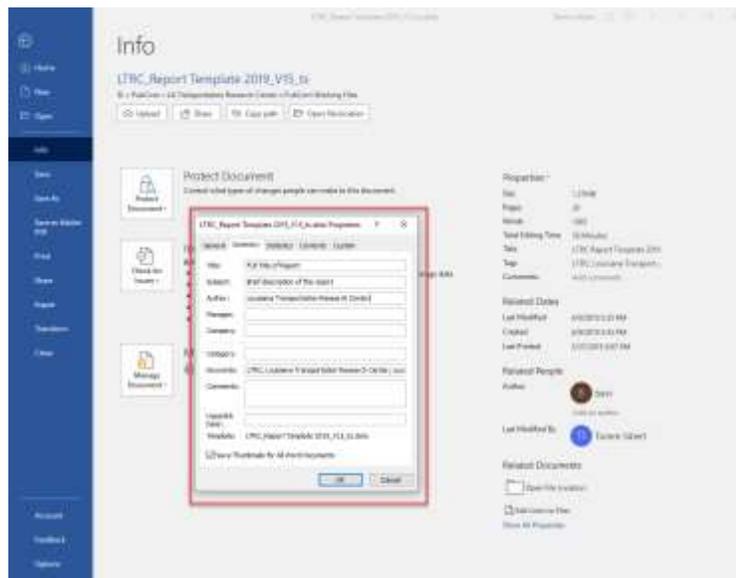
- **Author:** We recommend "Louisiana Transportation Research Center" and possibly the department, division, branch, or region if appropriate. However, follow LTRC's policy.

- **Title:** This template automatically populates this field with whatever is typed in the Title Content Control Box on page 1. Make sure the **Title field** exactly matches the actual title on page 1 (formatted with the Heading 1 style). Do not change the capitalization or make abbreviations in this properties dialogue.

- **Subject**: This appears in search engine results pages (and also in CMSs). Use sentence format to write a brief description of this document's most important points. Most search engines clip this field at around 180-200 characters; you can write longer descriptions, but ensure that the most important details are in the first 180 characters. Think of it as "tweet" size.

- **Keywords**: Unlimited number of key words and phrases. Separate them with semi-colons.

13. Tables of Contents, Lists of Figures and Tables

These 3 "TOCs" are pre-programmed to generate the lists from the paragraph styles used throughout the document.

- Table of Contents

- List of Tables

- List of Figures

> Do not manually type these lists by hand.
>
> Do not manually edit them.

If there is a typo or other error in the TOC, return to the actual heading text in the document and make the correction there. Then, update the TOC to bring in the corrected text.

Placeholders are designed into the template for these lists: do not remove them.

Instead, **update them** to reflect the new headings and their page numbers.

1. Click anywhere inside the placeholder TOC's text. The entire TOC becomes highlighted in grey.

2. **Right-Click** (anywhere in the highlighted TOC) and select **Update Field**. Then select **Entire Table**.
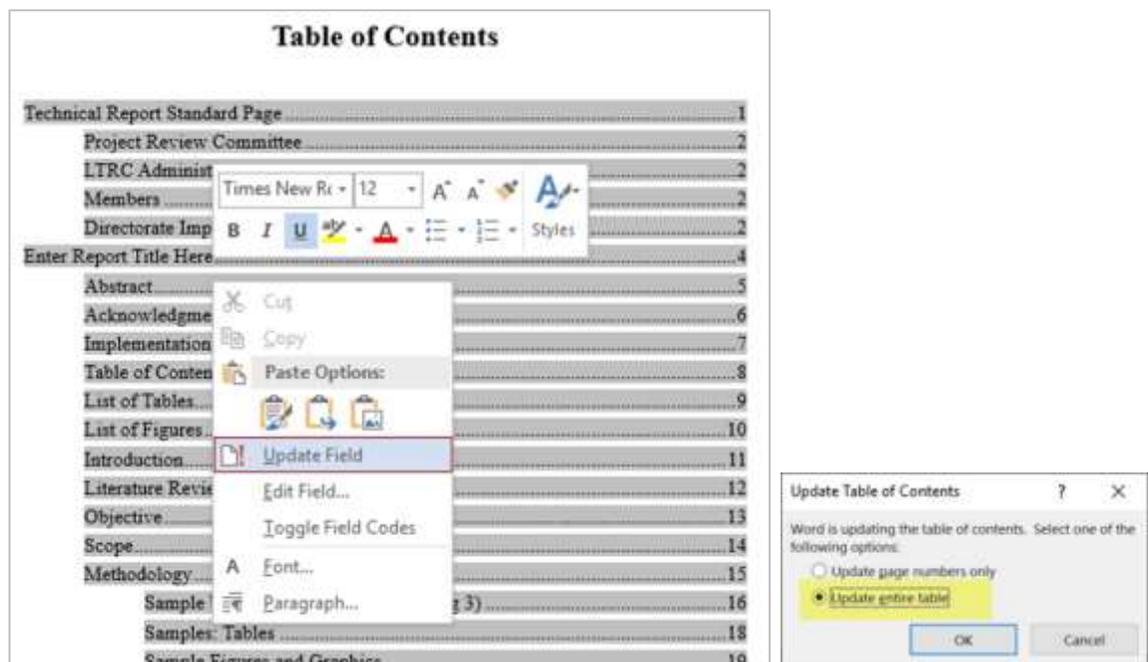
3. Repeat for the **List of Tables** and **List of Figures**.

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List of References, Citations, Bibliography

The Reference section at the end of the document is another auto-generated list that is **programmed into the template**.

After using Word's references utility to manage and insert references, you can now use it to generated the list of references or bibliography.

1. Click anywhere in the References placeholder. It becomes highlighted in grey.

2. Click **Update Citations and Bibliography**.
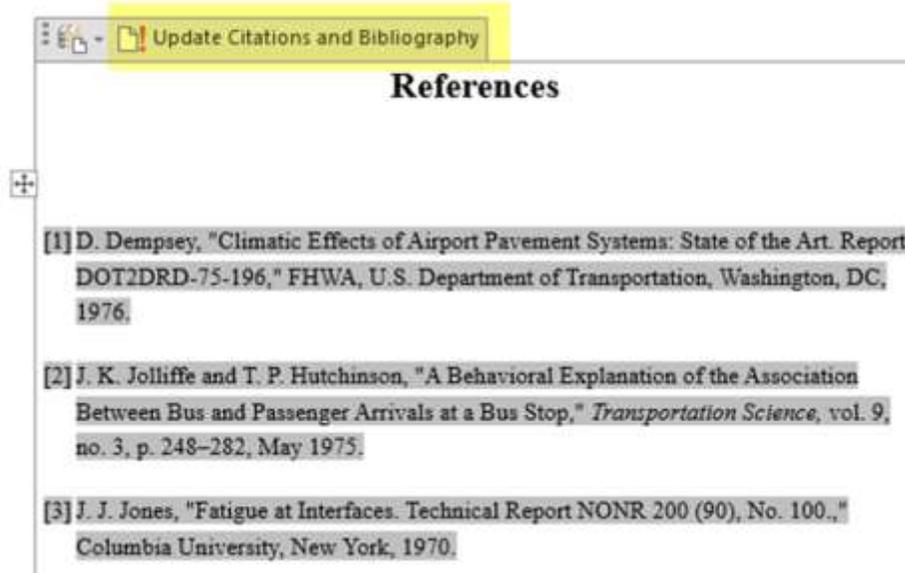
> Do not manually type the references/citations by hand.
>
> Do not manually edit them.

If there is a typo or other error in the list of references, return to the utility to **Manage Sources** in the References ribbon. When done, update the list of references.