Karlen Communications
Importing/Exporting Styles in Word

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Introduction

This booklet contains the content for week one of the EASI (Equal Access to Software and Information) four-part series on advanced features in Microsoft Word. The series is based on Word 2013, however most of the features exist in previous versions of Word.

- Resume Reading is only available in Word 2013.
- Import/Export can be found in Word 2007, 2010 and 2013.

The topic of Importing and Exporting Styles from one document to another follows a refresher in using, modifying and creating new Styles.

Resume Reading

This feature is new to Office 2013. It can be found in Word and PowerPoint. It is turned on by default, but if you don't want to use it, you can just press any key once the document opens. Word and PowerPoint then think that you don't want to resume reading or working where you last left off and your focus will be at the top of your document.

How Resume Reading works:

1. Open a Word 2013 DOCX document.
2. The Resume Reading Pane shows to the right of the document.
3. Click on it to go to the last place you were editing in the document.
    a. It should have focus but if you lose focus, press F6 and when you hear Resume Reading, press Spacebar.
    b. Do not press any other key or you will cancel the Resume Reading option because Word thinks you want to start working somewhere else in the document.

If the larger Resume Reading Pane collapses, you can still put focus on it by either clicking on it or pressing F6 to move to it and then pressing Enter unless you've pressed other keys.

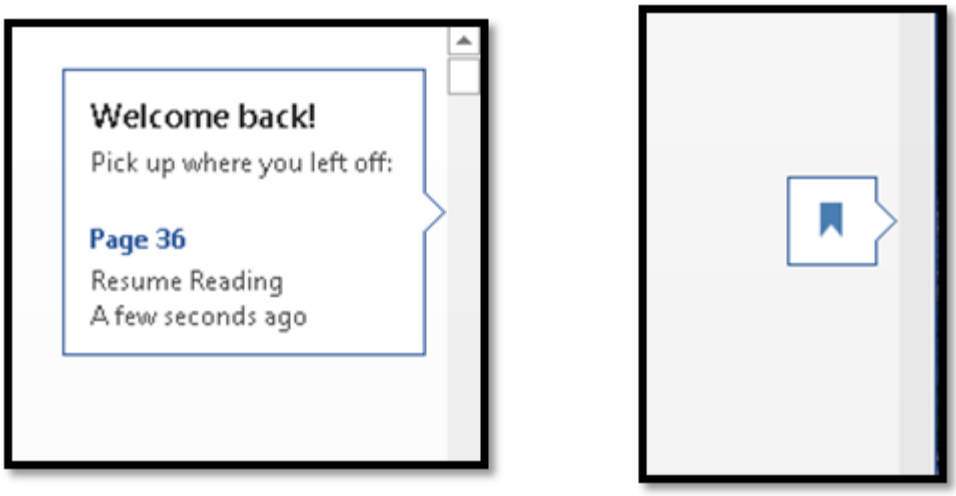


Figure 1 Resume Reading Pane: expanded (L) and collapsed (R).

Clearing Formatting

One of the important tasks when working with documents is being able to clear or erase formatting that you don't want. This is a refresher topic!

To remove all formatting from text in a Word document:

1. Select the text with the wonky formatting.
    a. You can also use Ctrl + A to select the entire document.
2. Press Alt + H, E for Home Ribbon, Erase.
3. This erases all formatting.

Pressing Ctrl + Shift + N on selected text will also remove all formatting and return text to Normal paragraph style.

Selecting a paragraph and pressing Ctrl + Q will remove paragraph formatting (Hanging Indents and line spacing) but not character formatting (bold or italic).

Selecting a paragraph and pressing Ctrl + Spacebar will remove character formatting (bold or italic) but not paragraph formatting (Hanging Indents or line spacing).

Figure 2 Erase Formatting on Home Ribbon.

Cut, Copy and Paste Settings

If you want to set some default Cut, Copy and Paste options, you can do this. Modifying these settings is useful if you are constantly copying and pasting content from one place to another. I use this as a backup to being able to manually erase formatting (Alt + H, E or Ctrl + Shift + N).

To modify the Cut, Copy and Paste settings:

1. Press Alt + F, T for File/Backstage area, Options.
2. Press A for Advanced settings.
3. Press Alt + W until you get to the Cut, Copy and Paste settings.
    a. If you are using a screen reader, you should hear "Pasting within the same document" and the current setting.
    b. These settings are list boxes.
4. The settings for all of these text related list boxes are:
    a. Keep Text Only.
    b. Keep Source Formatting.
    c. Use Destination Formatting.
5. Press Tab or Alt + B to move to the "Pasting between documents". Setting and make a choice.
6. Press Tab or Alt + E to move to the "Pasting between documents when style definitions conflict" and make a choice.
7. Press Tab or Alt + F to move to the "Pasting from other programs" setting" and make a choice.

Sometimes if you are pasting from the Internet, this setting is not respected so you will need to clear formatting once text is pasted.

There are two other techniques I use if, for some reason, formatted text is pasted into my document. I undo the paste and then put the text into NotePad. This will remove everything

but bullets or numbering. The other tip is to undo the paste, return to the source document, and if it is Word, clear the formatting of the text, copy it again and paste it into your destination document. When you go to close the source document, close without saving or simply undo the clear formatting…whichever works best for your way of working with documents.

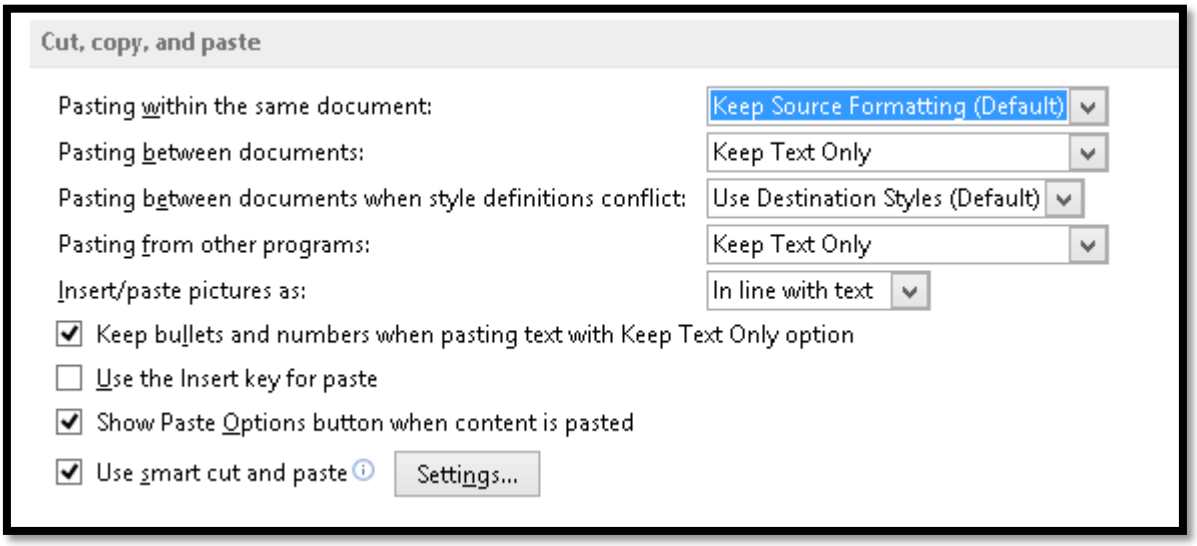


Figure 3 Word Options, Cut, Copy and Paste settings.

The most accessible option for inserting or pasting images into documents is the default setting which is as an inline object.

The option to "Keep bullets and numbering when pasting text with Keep Text Only option (Alt + L) is checked by default. If you are someone who is constantly fighting with bullets and numbering, you might want to turn this off by unchecking it.

The option to "Use the Insert key for pasting" is turned off by default. Turning this on might conflict with your use of adaptive technology if you use the Insert key on the six pack as part of the adaptive technology keyboard commands.

The setting to "Show Paste Options button when content is pasted" (Alt + letter O) is annoying and can conflict with your ability to quickly move from the copied content to continue writing or editing the document. I recommend turning it off.

If you want to "Use smart cut and paste" press Alt + S to move to that check box and check it. There is a button to the immediate right of this checkbox that lets you adjust the Smart Paste settings (Alt + N).

Smart Paste Options

You can either Tab through these settings or use the keyboard command shown. If you use the keyboard command, you will move to and either check or uncheck the setting. If you

are using a screen reader, listen carefully to the state of the checkbox to make sure you are changing the setting to what you want it to be.

The following are the settings found in the Smart Paste dialog:

- Adjust sentence and word spacing automatically. (Alt + W)
- Adjust paragraph spacing on paste. (Alt + P)
- Adjust table formatting and alignment on paste. (Alt + T)
- Smart Style behaviour. (Alt + S)
- Merge formatting when pasting from Microsoft PowerPoint. (Alt + letter O)
- Merge formatting when pasting from Microsoft Excel. (Alt + E)
- Merge pasted lists with surrounding lists. (Alt + M)

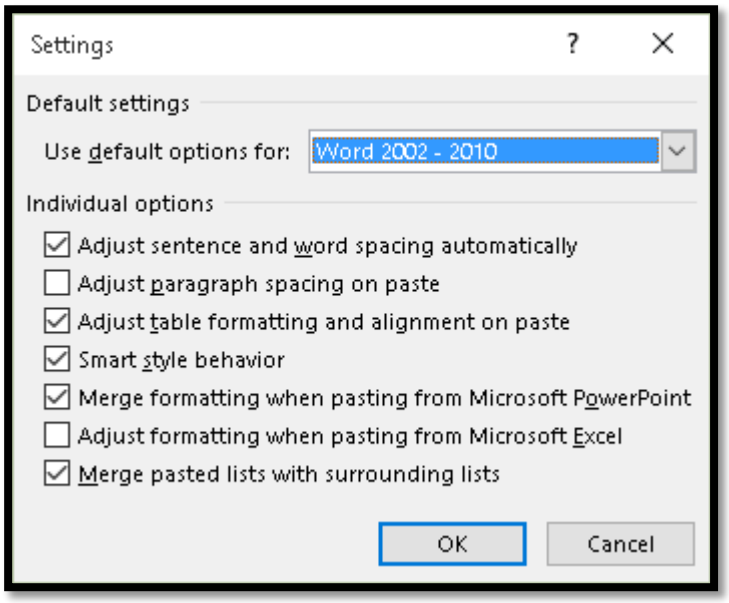


Figure 4 Word Smart Paste Options dialog.

If you have problems with bulleted and numbered lists and the auto numbering, uncheck the checkbox to merge lists with surrounding lists.

When you are finished, Tab to the OK button and press Enter. Your settings are saved and you are returned to the Word Options dialog. Tab to the OK button and press Enter to confirm everything. You are returned to the document.

AutoCorrect Options

In reviewing the topic of Cut, copy and Paste, it occurs to me that many of us have problems with the auto formatting of bulleted and numbered lists as we copy or move content. There

are settings in the AutoCorrect dialog that might help lessen those frustrations when you are creating a document.

To access the AutoCorrect dialog, press Alt + F, T for File/Backstage area, Options.

Press P for Proofing and then Tab once to land on the AutoCorrect Options button. Press Enter to open the AutoCorrect dialog.

Press Ctrl + Tab in the AutoCorrect dialog until you land on "Format as you Type."

None of these settings have keyboard commands. You will have to Tab through them.

You can change the following settings:

- Replace straight quotes with smart quotes which is checked by default.
- Fractions with fraction characters which is checked by default.
- "Bold" and _italic_ with real formatting which is not checked by default.
- Internet and network paths with hyperlinks which is checked by default.
- Ordinals with superscript (for example 1st) which is checked by default.
- Hyphens with an Em Dash.

The next series of settings in the AutoCorrect, format as you Type settings are:

- Automatic bullets and lists which is checked by default.
- Border lines which is checked by default.
- Heading Styles which is not checked by default. This will be based on the length of the text and it is not recommended that you check this.
- Automatic numbered lists which is checked by default.
- Tables which is checked by default.

The last series of settings in the AutoCorrect, format as you Type settings are:

- Format beginning of list item like the one before it which is checked by default.
- Set left and first indent with Tab and Backspace which is checked by default.
- Define Styles based on your formatting which is unchecked by default.

Tab to the OK button and press Enter. You are returned to the Word Options dialog. Tab to and activate the OK button by pressing Enter. Your settings are saved and you are returned to the document.

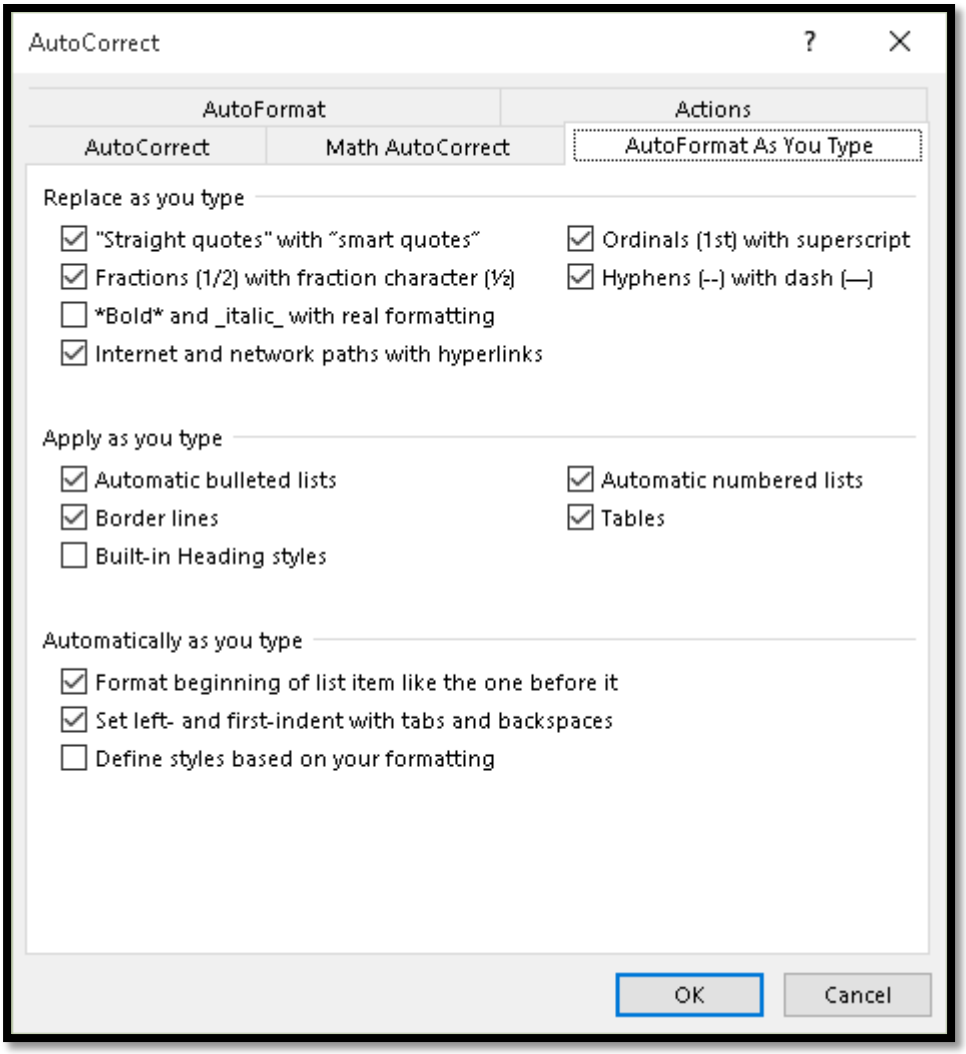


Figure 5 AutoCorrect dialog with Format as you Type tab in focus.

Navigation Pane

Anyone can see the same structure of the document as someone using a screen reader or adaptive technology with the ability to list Headings.

Use the Navigation Pane: Alt + W, K

It is a toggle – Alt + W, K and with focus on the document will close the Navigation Pane.

Figure 6 Navigation Pane in the View Ribbon.

If focus is on the Navigation pane, press Ctrl + Spacebar, C to Close it.

Headings are nested: H2 is nested under H1; H3 is nested under H2 and so forth. This will also let you make sure that your headings are sequential and that you aren't jumping from a Heading 1 to a Heading 3 without a Heading 2 between them. Headings must be used sequentially to optimize your documents for accessibility.

You can use the Navigation Pane with the keyboard. When the Navigation Pane opens, press Tab until you reach the first Heading, then use the Arrow keys to move up or down, expand or collapse Headings. Press Enter on the topic you want to go to in the document.

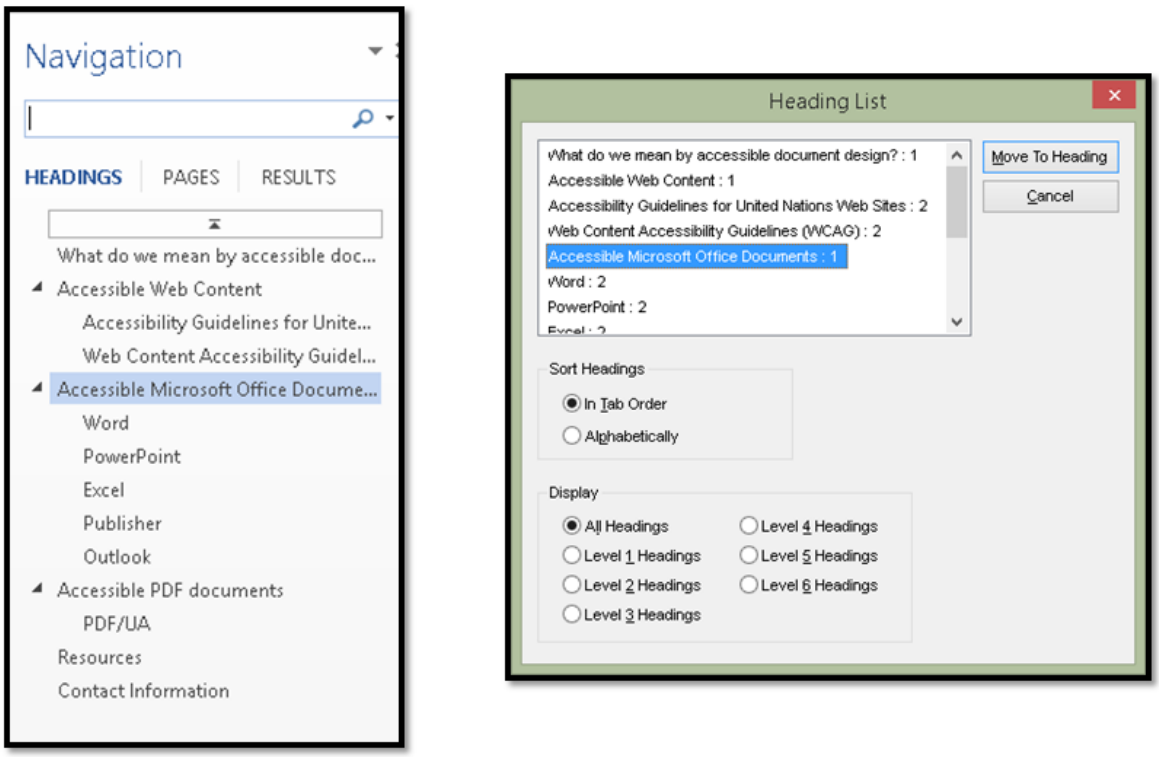


Figure 7 Navigation Pane (L) and list of Headings from JAWS screen reader (R).

Modifying a Heading Style

This topic is a refresher provided because we are going to use the Import/Export Styles and I thought you might like to create your own test documents instead of using the ones provided with this tutorial.

You want to Modify Heading Styles in a template NOT your Normal document template. This is advice for things like newsletters, reports or letters. In my version of Word, I modify the Headings and the Quote style in the Normal document template so that it is easier for me to see the differences and to create a more accessible document when I use the Normal document template. The only modifications I make are in the colours used for text. I 00do any other modifications in the Normal document template. I create separate templates for specific types of documents.

When you are working with Styles in a template, particularly Heading Styles, you want to keep the same name instead of creating a new Style called “Big Blue Text” which has little or no meaning or context for someone else who might be editing and revising the document/template. Modifying existing Styles such as “Heading 1,”Quote, Intense Quote or Intense Emphasis keeps your list of Styles clean and uncluttered.

Never choose to automatically update any Styles!

When you modify a Style, you can include

- Colour – as long as there is good contrast.
- Borders and shading.
- Fonts and font sizes.
- Alignment.

By modifying the existing Heading Styles, you can use the keyboard commands for the first three levels of Headings:

- Ctrl + Alt + number 1 for Heading 1.
- Ctrl + Alt + 2 for Heading 2.
- Ctrl + Alt + 3 for Heading 3.

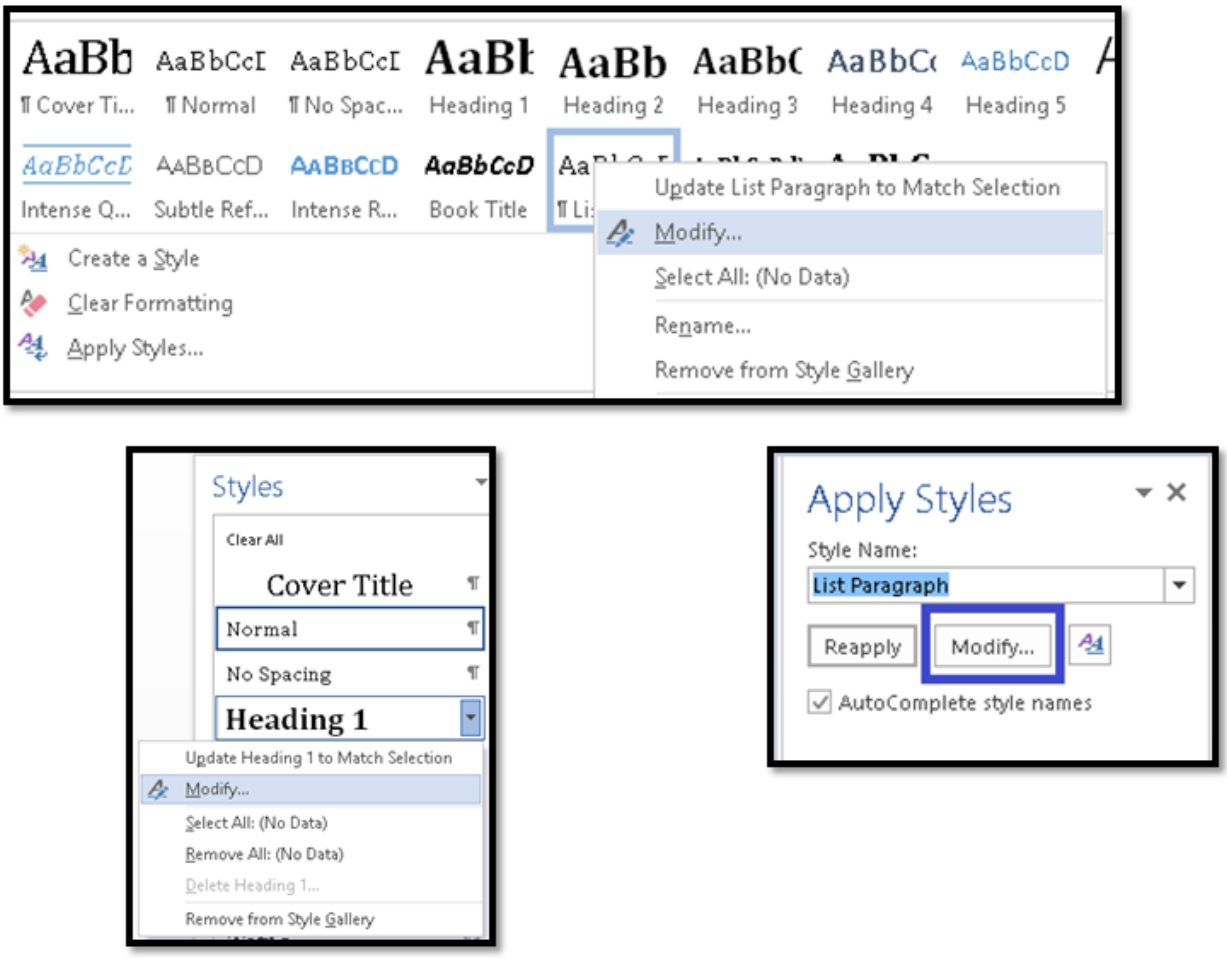


Figure 8 Three ways to open the Modify Styles dialog.

There are a few ways to access the Modify Style dialog.

- Right click or press the AppKey on the Style in the Quick Access Gallery from the Styles Group on the Home Ribbon. You will need to manually move through all of the Styles until you find the one you want if you are using the keyboard. There is no first character navigation.
- Right Click or press the AppKey on the Style in the Styles Pane (Alt + H, F, Y opens the Styles pane). You will need to move through the list of Styles until you get to the one you want to Modify as there is no first character navigation in the Styles Pane.
- If you have selected text and formatted it (for example, as a Heading 1), you can press Ctrl + Shift + S to open the Styles pane and then choose the Modify button. For anyone using the keyboard, this is the fastest way.

When the Modify Styles dialog opens, you will be in the edit field for the name of the Style. Leave this as is.

If you are modifying the regular Heading Styles (for example, Heading 1), you will see that it is based on the Normal Style. This is…well, normal. Since this is a basic inherent Style, it is based on the Normal Style. However, as we'll see, if you are creating a new Heading Style, it must be based on an existing Heading Style in order to retain the structure and role in the document.

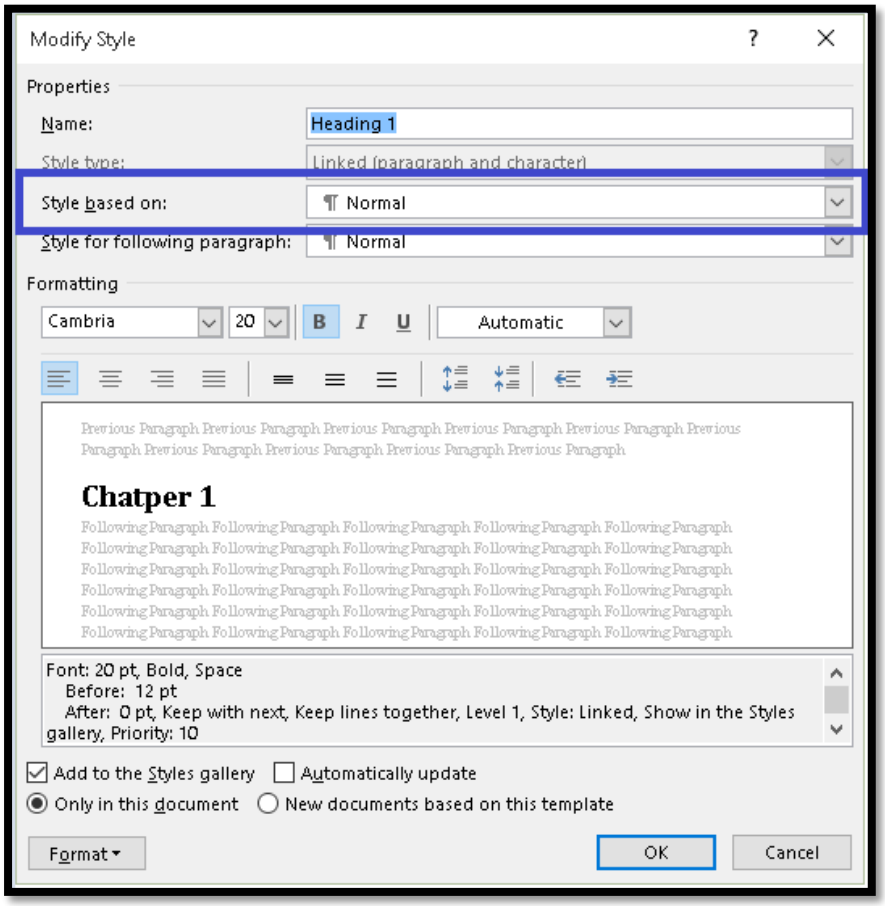


Figure 9 Style based on options in Modify Style dialog for Heading 1

You can now make any changes including colour of text, font size, font style, borders, shading alignment and so forth.

Keep in mind good colour contrast, the use of a standard font, readability of the text if you are considering shading and the effectiveness of a border if you are considering a border.

Saving Style Changes to the Document/Template

The following is the process for saving changes to any style you've modified or created.

There are two radio buttons in the Modify Style or New Style dialog:

- Press Alt + D to move to the first radio button which is to save the modifications so that they will only affect the current document (Only in this document).

- If you want to save the modifications or new style so it is available to new documents based on this template, press the Right Arrow key to move to that option (New documents based on this template).

When you save the document you will have the opportunity to save the changes to the template. This is Word's method of checking with you to make sure you want to save the changes to the template, if you chose that option, or not.

After making your choice, move to and activate the OK button.

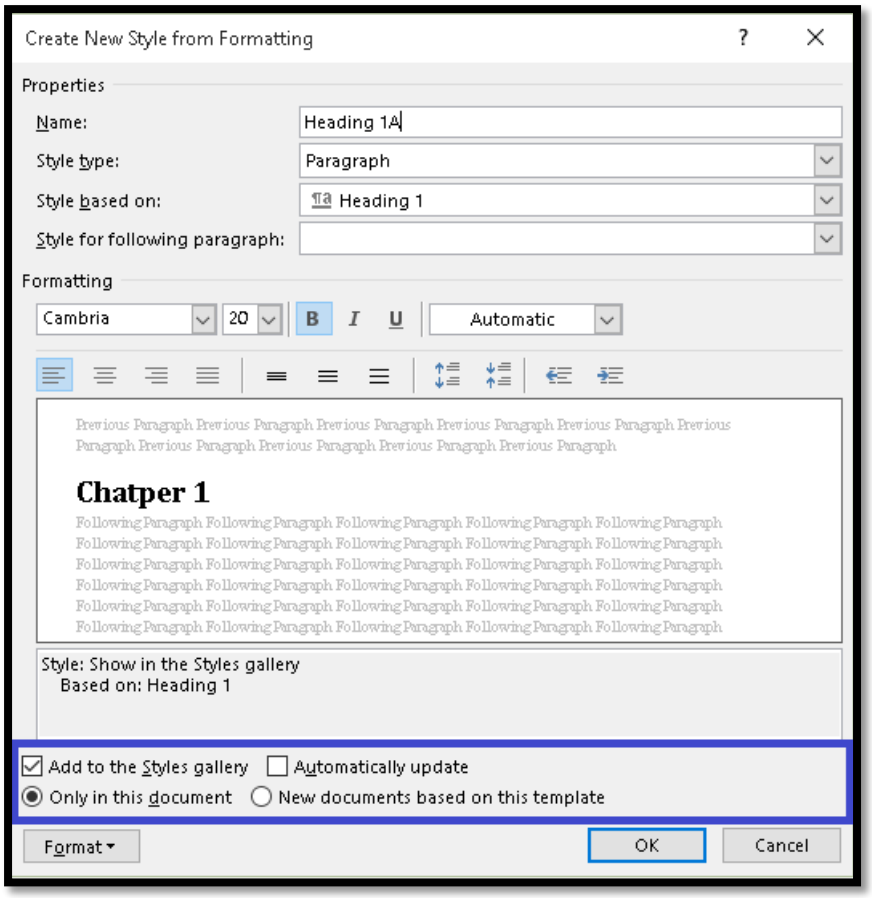


Figure 10 Options to save for this document only or new documents based on this template.

Creating a New Style

I always find it saves time and frustration if I create the new style from formatting. This is especially true when working with structural elements such as Headings or lists.

In this example, we are going to create a new Heading 1, called Heading 1A, based on the existing Heading 1.

To create a new Heading 1 Style:

1. Select text and then apply the Heading Style you want to base the new style on. In this case it is Heading 1 (Ctrl + Alt + number 1).
2. Press Alt + F, Y to open the Styles Pane.
    a. It is faster to use the keyboard.
3. If you are using the keyboard, it is faster to Shift + Tab through the last items in the Styles Pane to get to the New Style button.
4. Press Enter on the New Style button.
5. The New Style from formatting (aka New Style dialog) opens.

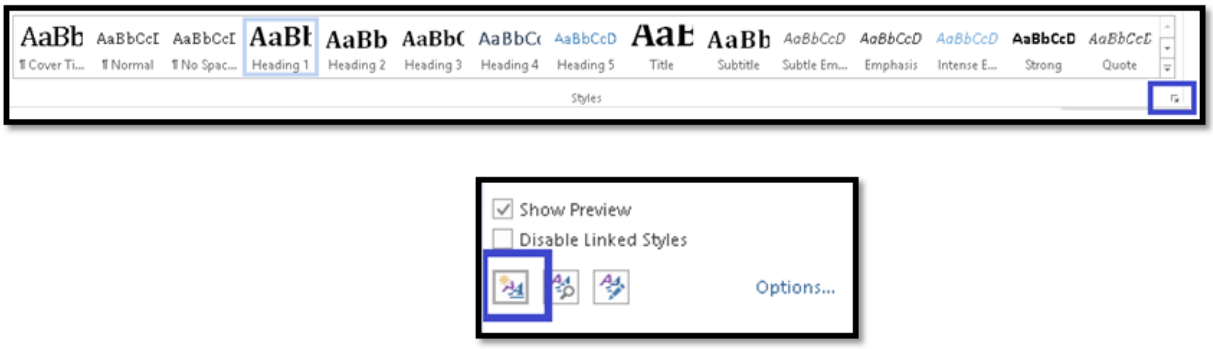


Figure 11 Button for New Style Pane in the Quick Styles Gallery (Top) and the Apply Styles Pane (bottom).

When the New Style from Formatting dialog opens, your focus is in the edit box where you can name the Style. I find it helpful to keep the names "linear." In this case we are going to name the new Style "Heading 1A."

This will let it fall in alphabetical order in the Styles Pane making it even easier to locate and use.

We formatted text as a Heading 1 so that we wouldn't have to remember what we are doing and the Style based on is already filled in with Heading 1. If we hadn't done this, we would have to expand the list of Styles and locate Heading 1.

This means our new Style, Heading 1A, will be based on Heading 1. This is what we want. If you are creating multiple types of Headings with different formats, you want to make sure that they are all based on the correct Heading level. If they aren't, they won't show up in a Table of Contents, the Navigation pane and will not be navigational points in the document.

This is the reason I brought your attention to the fact that if you are working with a generic or default Heading 1, the Style it is based on IS the Normal Style…the Normal paragraph Style.

Any subsequent Headings **must** be based on an existing Heading Style in order to have all of the structural qualities of a Heading.

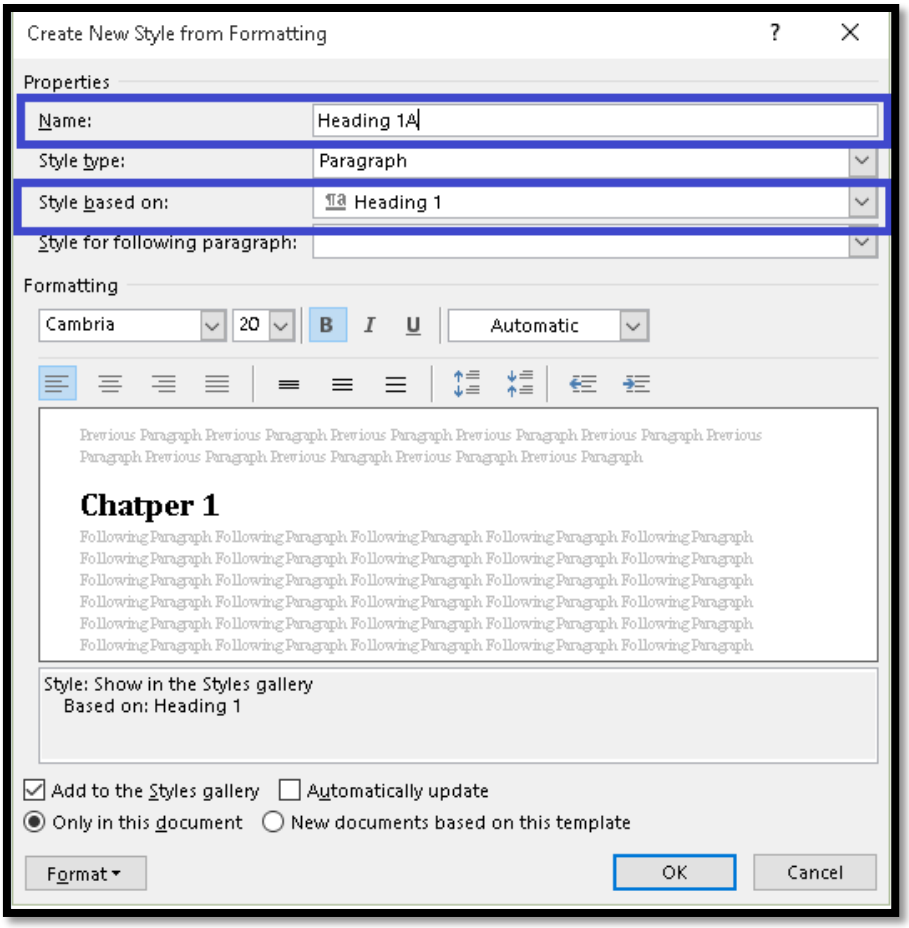


Figure 12 Create New Style from Formatting showing name and style based on settings.

You can now make any changes to Heading 1A that you want.

Keep in mind the look and feel of the document that you want. Consistent formatting looks professional. If you are at the point of creating Heading 1C, you should probably have already questioned your design decisions. More only makes things look visually confusing. Additionally, if we find that there are many different looks and feels for a Heading 1, there is no real structure to the document. It becomes the equivalent of flinging formatting at text.

Showing Styles Alphabetically in Styles Pane

I mentioned the ability to show Styles in the Styles Pane in alphabetical order. For those of you who haven't done this before, it is easy. You do need to do it with each document if you are using the Styles Pane.

To show the Styles in alphabetical order in the Styles Pane:

1. Press Alt + H. F, Y to open the Styles Pane.
    a. Click on the Options link in the Styles Pane.

b. It is at the bottom of the Styles Pane.

c. If you are using the keyboard, Shift Tab once you have focus on the Styles Pane because the Options link is the last thing in the Styles Pane, at the bottom of it.

2. Once the dialog opens, press Alt + S to move to the "Select how list is sorted."
3. Choose alphabetical and then move to and activate the OK button by pressing Enter.

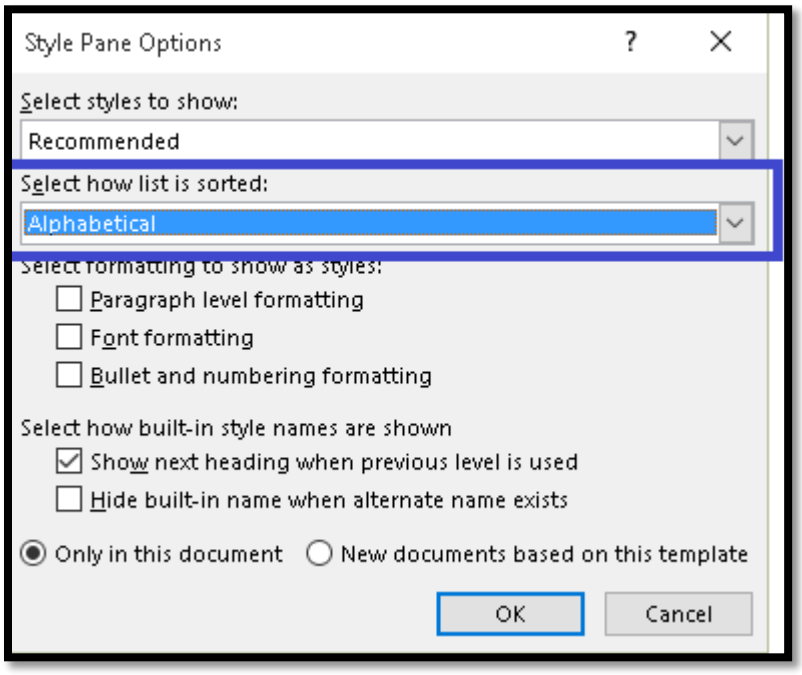


Figure 13 Show Styles in alphabetical order.

Importing and Exporting Styles

There are two sample documents for this topic for you to work with:

- Destination Document.DOCX (Word document).
- Source Document.DOTX (Word Template).

The destination document is a Word template which is why it has the DOTX extension. Ideally you will copy this into your Custom Office Templates folder (Office 2013) so that you won't have to change the file type you will eventually look for.

To use Import/Export Styles:

1. Press Alt + H, F, Y to open the Styles Pane.
2. Press Shift Tab twice to move to the Manage Styles button and press Enter.
3. The Manage Styles dialog opens.

4. Press Alt + letter I to move to and activate the Import/Export dialog. The Import/Export button is in the lower left of the Manage Styles dialog for those who are mouse dependent.

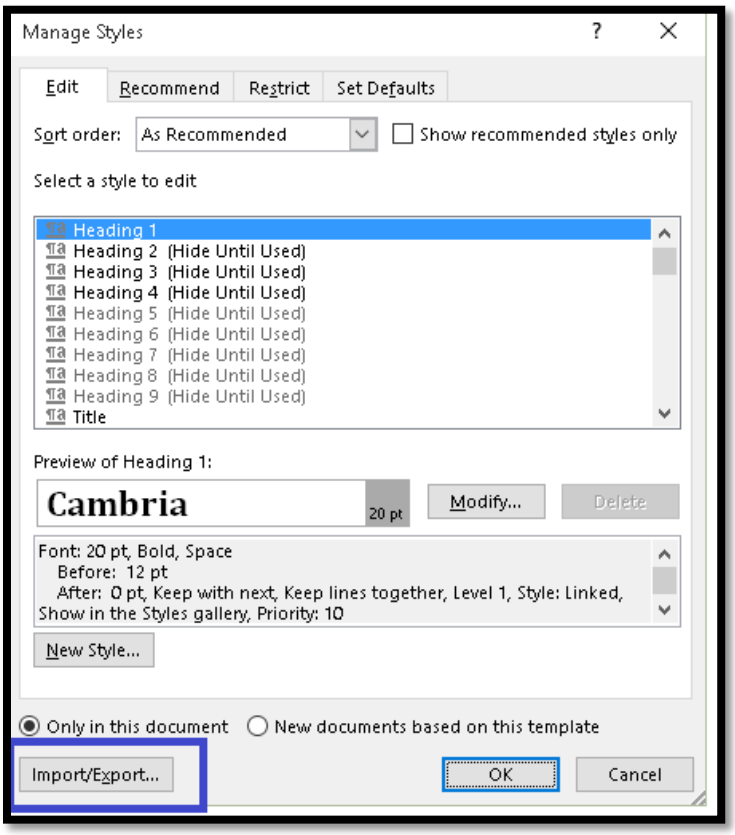


Figure 14 Import/Export button in Manage Styles dialog.

When the Import/Export Styles dialog opens the document that you have open and that is in focus will be on the left and the Normal document template (Normal.DOtX) will be on the right.

If you leave this as is, you will import the Styles into or from your Normal document template.

You don't want to do this. I created some horrid Styles for effect in the destination document template! This is what we will use.

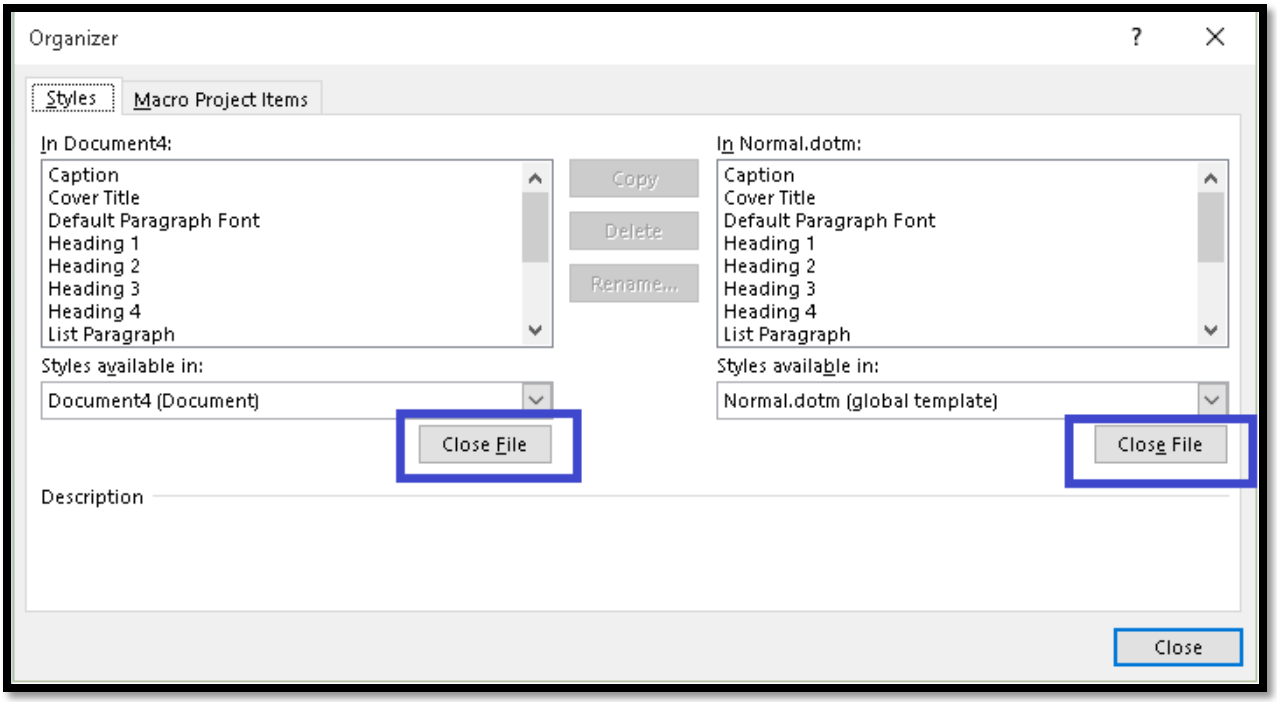


Figure 15 Organizer dialog showing two Close File buttons.

The document on the left has a Close File button that can be used by pressing Alt + F. This will close that document and the Close File button becomes an Open File button.

The Open File button for the document on the left can be activated by pressing Alt + F (same keyboard command).

If you want to close the document on the right, the keyboard command is Alt + E. As with the other Close File button, you will now see an Open File Button.

The Open File button for the document on the right uses the same keyboard command as for Close File, Alt + E.

This lets you remember a consistent keyboard command for the document on the left and the document on the right for opening and closing documents. You just have to remember which side you are on.

1. Press Alt + E to Close the document on the right.
    a. The Close button is now the Open button.
2. Press Alt + E again to activate the Open button so you can choose the source document DOTX file.
    a. Locate this file and open it so that it is in the area on the right of the Organize dialog.

Note: I purposely created the DOTX file so you wouldn't have to change the file type in the Open dialog. You can use other documents like DOCX to import/export to and from. For this exercise, it is just easier to use a DOTX file.

You are now ready to copy formatting from the right to the left or from the Source Document template to the destination document on the left.

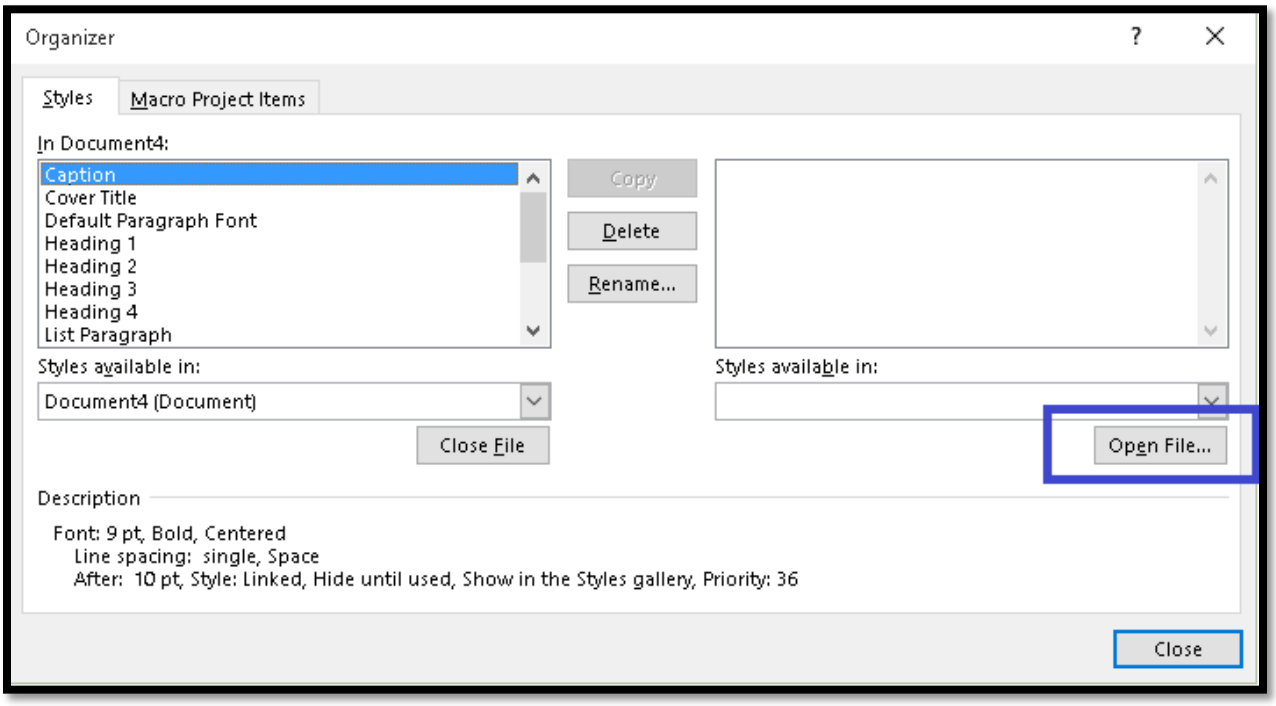


Figure 16 Organizer dialog showing Open File button.

Activating the Open File button will result in the Open dialog where you can choose the document you want.

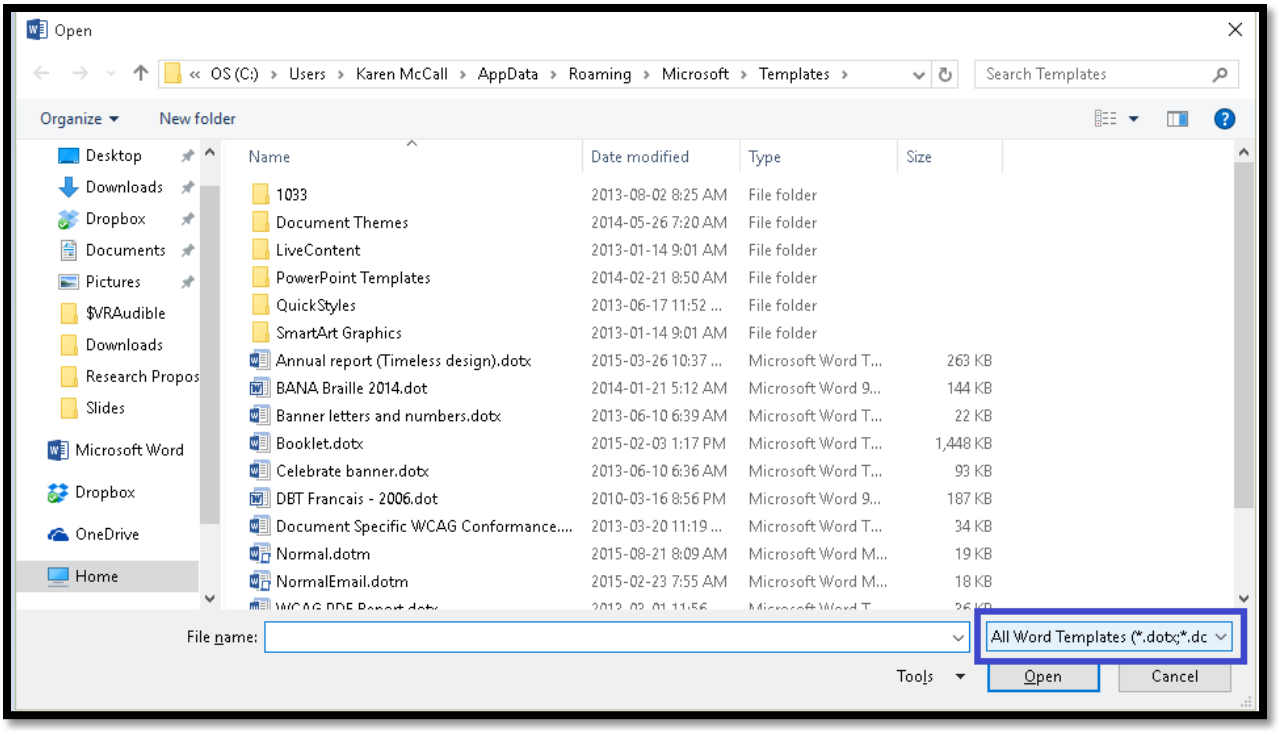
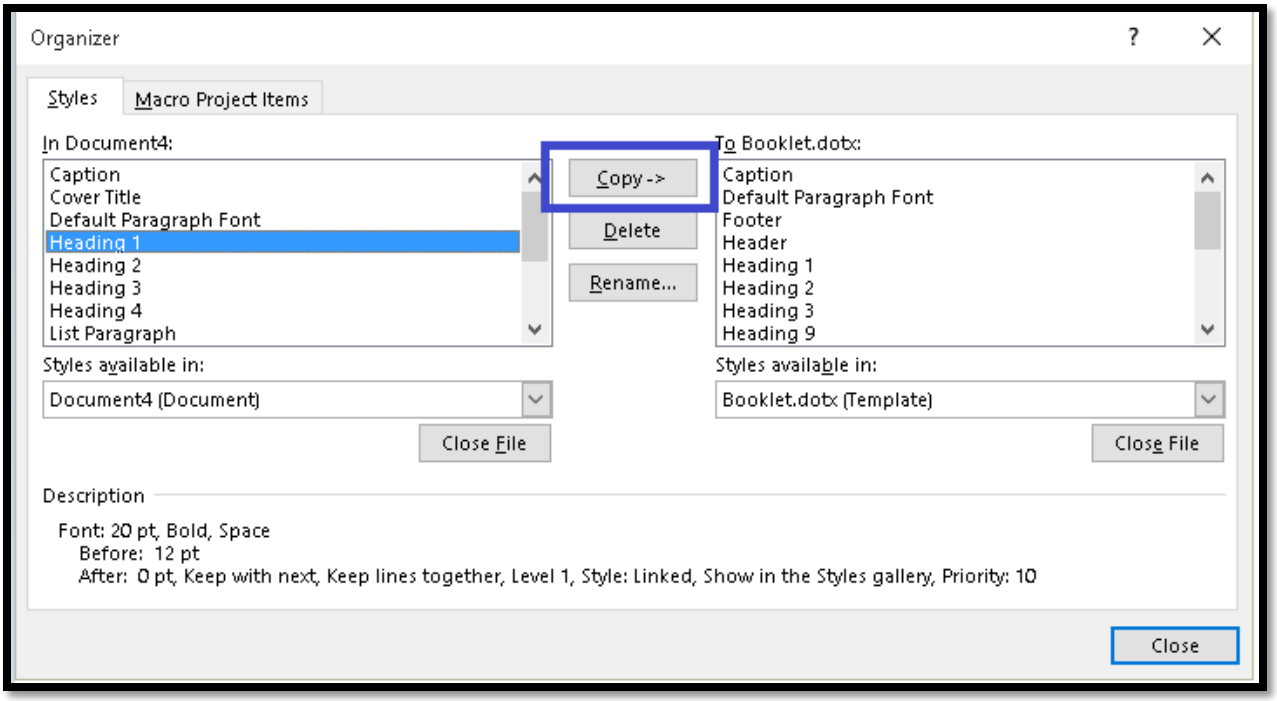


Figure 17 Choose file type to open.

Once you have a source document and a destination document open, you can choose which way to copy Styles. I usually copy from left to right, but for this exercise we are copying right to left. I do this consistently so that I don't confuse myself if I am doing this using a screen reader or screen magnification.

Once you select a Style on the left, the Copy button in the middle has an arrow pointing to the right. This lets you know the direction Styles will be copied to.



You can't use Ctrl + A to select all Styles to copy at once but you can hold down the Ctrl key and then use the Up or Down Arrow key to select multiple Styles at once. If you press Home to get to the top of the list of Styles, you can use this technique to select all Styles and copy them to the other document.

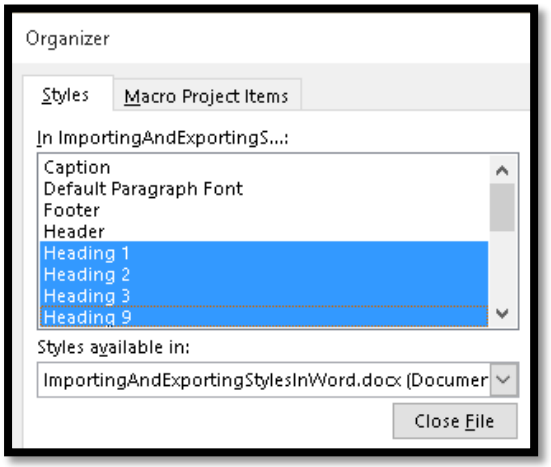
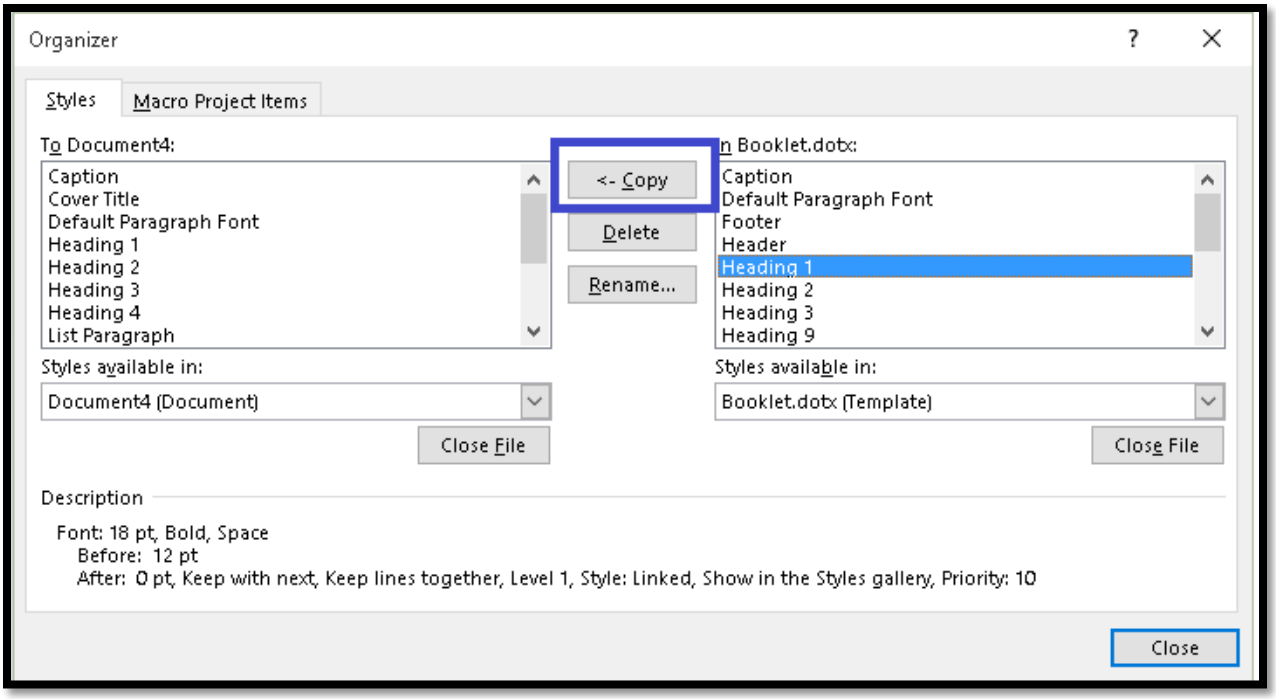


Figure 18 Multiple Styles selected in Import/Export process.

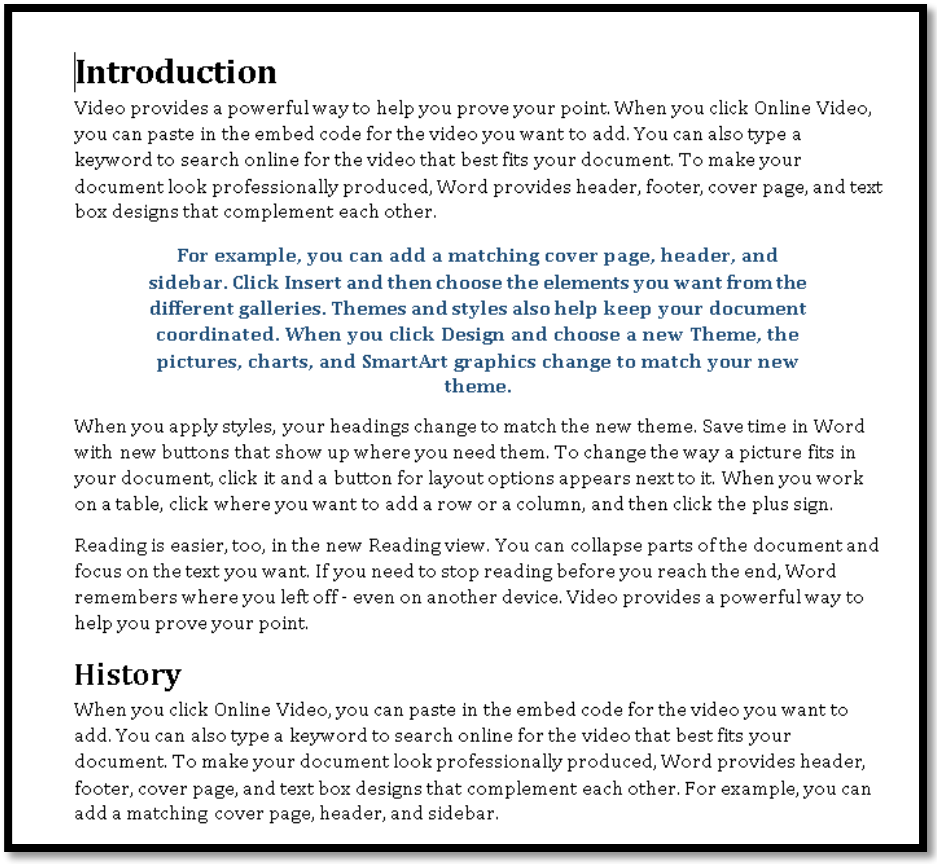
If you select Styles in the document on the right, the Copy button shows an arrow pointing to the left. This is the direction we are going to copy Styles from.

This information is not rendered to a screen reader. If you are using a screen reader, it is important to keep track of which document you are focusing on.



1. Select all of the Styles on the right.
2. Activate the Copy button which should have the arrow pointing to the left.
3. You will be asked if you are sure you want to copy the Styles. Choose Yes to All.
4. Close the Organize dialog by pressing Tab to the Close button and then pressing Enter.
5. Close the Manage Styles dialog by pressing Tab to the OK button and pressing Enter.
6. You are returned to your document which should now have the Styles from the source document instead of the ones you started out with.
7. When you close the document, you will be asked if you want to save the changes to the Styles/formatting. You can choose not to do this if you want to use these documents for practice.

The following image is of the destination document and the formatting I've added to it.



Introduction

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document. To make your document look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other.

For example, you can add a matching cover page, header, and sidebar. Click Insert and then choose the elements you want from the different galleries. Themes and styles also help keep your document coordinated. When you click Design and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme.

When you apply styles, your headings change to match the new theme. Save time in Word with new buttons that show up where you need them. To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus sign.

Reading is easier, too, in the new Reading view. You can collapse parts of the document and focus on the text you want. If you need to stop reading before you reach the end, Word remembers where you left off - even on another device. Video provides a powerful way to help you prove your point.

History

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Figure 19 Document with original Styles before import of different styles.

The following image is of the formatting in the source document. I've purposely made it hideous so that you can easily see the results of an import/export process.

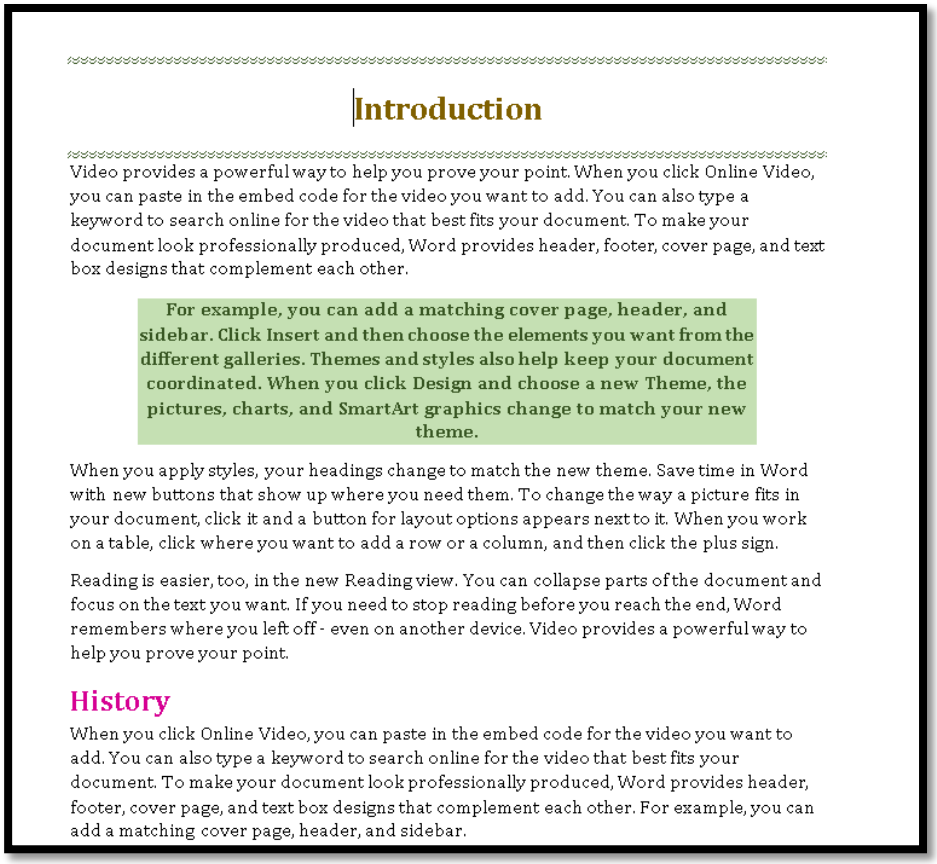

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Figure 20 Styles to be imported into another document.

The ability to import and export Styles from one document to another is a powerful tool for those of us who work in the field of accessible document design or who are tasked with updating legacy templates and documents with new branding that contains fonts, font sizes, colours and decorative effects.

Contact Information

You can contact Karen McCall with any questions about this how to booklet or any suggestions for others. Visit the Karlen Communications web site for more how to booklets!