FORMATTING INTERNAL REPORTS

dot **digital opportunity trust**

Using the Internal Report Template

Contents

About This Guide

This guide outlines the custom layout elements that are available in the Internal Report Template, and how you can use them to format reports. These instructions are for Macintosh computers running OS X Yosemite or higher and Microsoft Office 2016. Instructions may differ for other software versions.

⭐ **Prerequisite**

Before you create an internal report, ensure that the DOT Internal Report Template and Microsoft Office theme files are installed in the appropriate locations on your computer. For more information, see *Installing DOT Template and Theme Files*.

📢 **Important**

To access custom layout elements, the Internal Report Template must be attached to your document. If you are sharing files between computers, you may need to re-attach the Internal Report Template to your file.
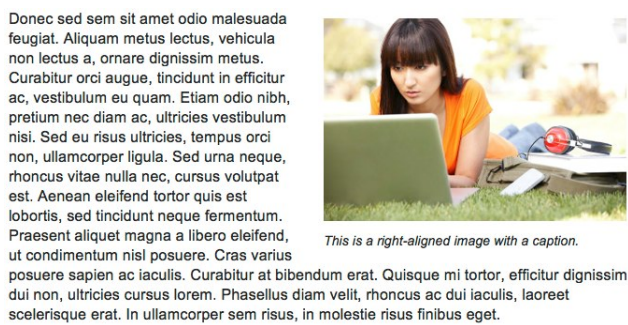
Working With Custom Layout Elements

Using Word's AutoText feature, you can insert these custom elements in your internal reports:

- Images with captions
- Pull quotes
- Feature stories
- Section title pages

Inserting an Image with a Caption

You can insert images with captions in your document.

Donec sed sem sit amet odio malesuada feugiat. Aliquam metus lectus, vehicula non lectus a, ornare dignissim metus. Curabitur orci augue, tincidunt in efficitur ac, vestibulum eu quam. Etiam odio nibh, pretium nec diam ac, ultricies vestibulum nisi. Sed eu risus ultricies, tempus orci non, ullamcorper ligula. Sed urna neque, rhoncus vitae nulla nec, cursus volutpat est. Aenean eleifend tortor quis est lobortis, sed tincidunt neque fermentum. Praesent aliquet magna a libero eleifend, ut condimentum nisl posuere. Cras varius posuere sapien ac iaculis. Curabitur at bibendum erat. Quisque mi tortor, efficitur dignissim dui non, ultricies cursus lorem. Phasellus diam velit, rhoncus ac dui iaculis, laoreet scelerisque erat. In ullamcorper sem risus, in molestie risus finibus eget.

This is a right-aligned image with a caption.

There are three alignment options:

- **Left-aligned**

  The image is aligned to the document's left margin; paragraph text wraps around it.

- **Right-aligned**

  The image is aligned to the document's right margin; paragraph text wraps around it.

- **Center-aligned**

  The image is centered on the document page; paragraph text does not wrap around it.

➔ **To insert an image with a caption**

1. Decide where you want the image to appear in your document, and then place your cursor at the beginning of the paragraph nearest to that spot.
2. Go to **Insert** > **AutoText** > **AutoText**.

3. From the **Look in** drop-down list, choose **Internal Report Template**.

4. From the AutoText entries list, select one of these options and then click **Insert**:

    > To insert an image that is centered on the page, select **Image Center-Aligned**.

    > To insert an image that aligns to the left margin, select **Image Left-Aligned**.

    > To insert an image that aligns to the right margin, select **Image Right-Aligned**.

    The image is inserted in the document.

5. Change the placeholder image and caption text.

Changing an Image

Changing placeholder images

You can change any placeholder images in your internal report.

➜ **To change a placeholder image**

1. Right-click the image and select **Change Picture**.

2. In the dialog box, locate the image you want to use, select it, and then select **Insert**.

    The placeholder image is replaced with the new image.

3. (Optional) To change the image size,

    > right-click the image and select **Size and Position**;

    > on the **Size** tab, change the **Width** and **Height** values. (Make sure the Lock Aspect Ratio check box is selected.)

4. (Optional) To move the image within its frame,

    > right-click the image and select **Format Picture**;

    > click the **Picture** tab ( ) and then in the Crop section, change the **Offset X** and **Offset Y** values.

Changing the report cover image

The report cover image is located in the header of the document. To open the header,

- double-click the area of the report cover image, or
- go to **View** > **Header and Footer**.
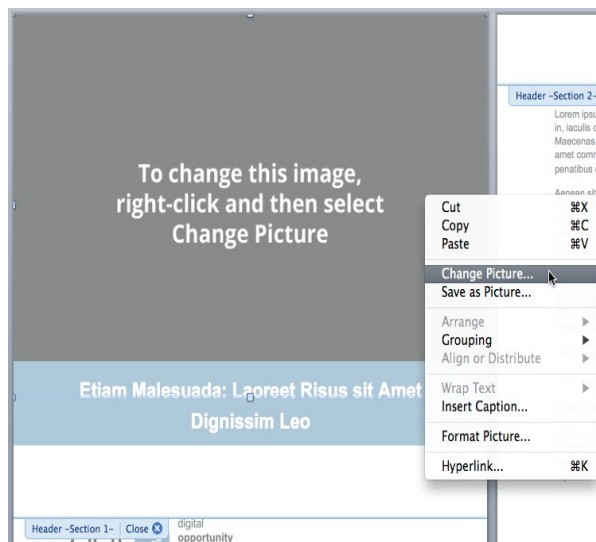
Once the header is open, you can then select the report cover image to change it. (See *Changing placeholder images*.)

Inserting a Pull Quote

Use pull quotes to highlight important or interesting information in your internal report. There are two different styles (circle background or no background) and different alignment options.
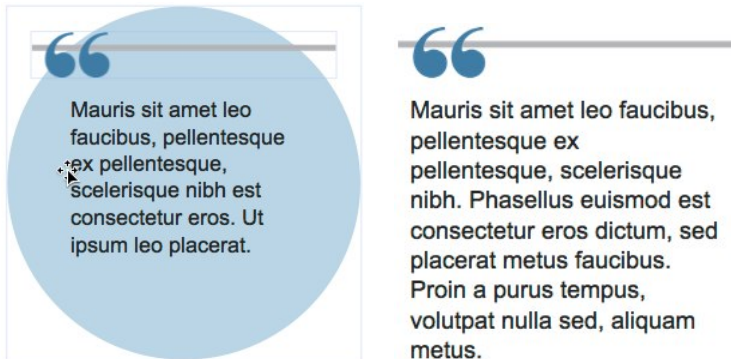
➜ **To insert a pull quote**

1. Decide where you want the pull quote to appear in your document, and then place your cursor at the beginning of the paragraph nearest to that spot.
2. Go to **Insert** > **AutoText** > **AutoText**.
3. From the **Look in** drop-down list, choose **Internal Report Template**.
4. From the AutoText entries list, select one of the pull quote options and then click **Insert**.

   > To insert a pull quote that is centered on the page, select **Pull Quote Center-Aligned**.

   > To insert a pull quote that aligns to the left margin, select one of the **Left-Aligned** pull quote options.

   > To insert a pull quote that aligns to the right margin, select one of the **Right-Aligned** pull quote options.

   The pull quote is inserted in the document.

5. Delete the placeholder text and type your pull quote.

Inserting a Feature Story

Use the feature story element to set apart information (for example, a success story) from the body of the report.

Success Story

Mauris sit amet leo faucibus, pellentesque ex pellentesque, scelerisque nibh. Phasellus euismod est consectetur eros dictum, sed placerat metus faucibus. Proin a purus tempus, volutpat nulla sed, aliquam metus. Proin rhoncus dolor leo, at tempor magna sollicitudin eget. Aenean consequat sapien nec pellentesque feugiat. Maecenas efficitur in massa cursus hendrerit. Nam ligula risus, tempus at interdum ut, placerat at metus. Duis risus justo, iaculis sit amet lobortis vel, ultricies ut tortor. Aliquam sit amet magna nisi. Ut nec urna vitae leo porta tempor et nec massa. Sed fermentum ex in elementum lacinia. Nullam rutrum neque sit amet lorem congue, sed rutrum arcu sagittis. Fusce dui justo, ornare quis nibh quis, convallis lacinia neque.

➜ **To insert a feature story**

1. Place your cursor at the beginning of the paragraph that you want to appear after the feature story.
2. Go to **Insert** > **AutoText** > **AutoText**.
3. From the **Look in** drop-down list, choose **Internal Report Template**.
4. From the AutoText entries list, select **Feature Story** and then click **Insert**.

   The feature story is inserted above the paragraph in the document.
5. Replace the placeholder text with your own title and body text.

Inserting a Section Title Page

If you need to divide your report into sections, you can begin each section with a title page.

➔ **To insert a section title page**

1. Place the cursor where you want the section title page to appear in your document, and then insert a page break (Insert > Break > Page Break).
2. Place your cursor directly after the page break and then go to **Insert** > **AutoText** > **AutoText**.
3. From the **Look in** drop-down list, choose **Internal Report Template**.
4. From the AutoText entries list, select **Section Title Page** and then click **Insert**.

    The section title page is inserted in the document.

5. Change the placeholder text to your own section title information.