

AN  
**OPEN**  
EDUCATION

**LIBRARIAN'S**

GUIDE TO

**MICROSOFT WORD**

**2024**



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# An Open Education Librarian's Guide to Microsoft Word 2024 MacOS

*Creating an Accessible Document*

Written and designed by Mia Klotz

## ACKNOWLEDGMENTS

I would like to express my deepest gratitude to Theresa, my insider Open Education Librarian, whose expertise and guidance were invaluable throughout this project. Her support helped shape my understanding of how Open Education Librarian's create their work and significantly contributed to the development of this manual.

I also wish to thank my classmates, whose collaboration and thoughtful feedback during workshops played a critical role in refining the content. Their advice, suggestions, and shared insights helped transform this manual into the resource it is today.

Finally, I am extremely grateful to Professor Janine Solberg for her continuous support and encouragement throughout this journey.

This manual wouldn't be what it is today without their support, so thank you.

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## INTRODUCTION

Why did the teacher love open pedagogy?

Because sharing the spotlight was way better than lecturing in the dark!

If you just laughed at that joke, then this manual is for you. As an Open Education Librarian creating accessible documents is a key part of your job; and having the skills to use tools in platforms such as, Microsoft Word, can help you improve the documents that you create. In *An Open Education Librarian's Guide to Microsoft Word 2024*, you will find instructions on how to create an accessible document through applying styles, creating a table of contents, inserting hyperlinks, creating alternative text, and sharing and granting access to your Word document.

While each chapter focuses on a specific aspect, together they contribute to enhancing accessibility. First, by applying paragraph styles, you ensure consistency, improve screen reader compatibility, facilitate the creation of a table of contents, and enhance the document's searchability. Next, by creating a table of contents you can enable easy navigation, organize content for the reader, and allow screen readers to jump directly to sections. The next chapter, Inserting Hyperlinks, also enhances navigation within the document and to external resources. Finally, the last chapter, Saving and Sharing your Document, will help you make sure your document can be easily shared and opened by all users, which is a main concern for many Open Education Librarians who want their materials to be accessible.

These chapters are structured in the format you may follow for your writing process in creating an open educational document. Beginning with applying styles to your document, creating alternative text for your images, checking accessibility, and then sharing your document. Whether you need to create a weekly agenda, share a Word document, or insert alternative text for your image, these tools will improve the accessibility for your users.

This manual will make your life easier as an Open Education Librarian by showing you the necessary tools to improve your documentation. You are already experienced in

searching for and creating openly accessible documents, but now it's time you discover how to utilize Microsoft Word for both you and your readers. I hope you find this manual helpful not only in your day-to-day, but also as you continue creating and sharing Open Educational Resources (OER) throughout your career. Now let's jump into yet another book!



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# APPLYING AND CREATING STYLES

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## CHAPTER ONE



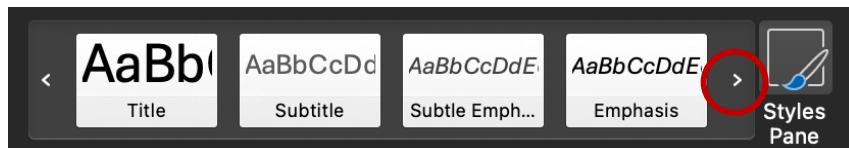
Why did the teacher bring OER to the beach?

Because it was a great way to catch some waves of knowledge!

## 1.1 Applying Heading Styles

Open Education focuses largely on creating accessible documents. Applying heading styles to your document helps create consistency, provide screen reader compatibility, allow for an easy construction of your table of contents, and improve the searchability of your document.

1. Select the text you want to apply the paragraph style to.  
**Note:** If you select a specific text, it only applies to that text. If your cursor is in a paragraph, it will apply to the entire paragraph.
2. On the **Home tab**, click the arrow next to the **Styles Pane** to scroll through the gallery.



Some paragraph styles helpful for Open Education Librarians are...

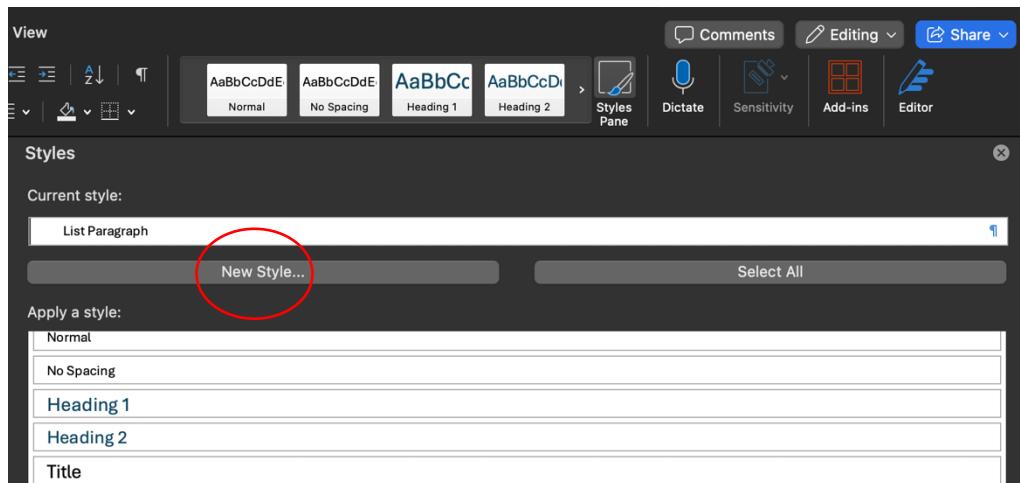
- Subtle emphasis
  - Emphasis
  - Strong Bolds text to emphasize.
  - Quote
  - Intense Quote
  - Subtle Reference
  - Intense Reference
  - List Paragraph If you need to insert a list, it will number and indent your text.
- Emphasis and subtle emphasis mean *italics*. Both are useful when you want your reader's attention on a specific word.
- Both Quote and Intense Quote are useful when inserting a quote in your document. This style will italicize and center your text.
- Subtle Reference is good when you want to reference something in small caps. Intense Reference does the same thing but also bolds your text.

**TIP:** If these styles don't meet the needs of your document, learn how to create a new style on 1.2, Creating a New Style.

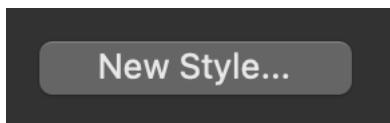
## 1.2 Creating a New Style

Paragraph styles can be a great way to create consistency in your document. However, sometimes the styles provided don't suit the type of documentation you want to create. If you want to create a new paragraph style, this section will explain the steps as well as the modifications you can make to personalize your document and your paragraph styles.

1. On the **Home tab**, click the **Styles Pane**. A panel will appear with all style options.

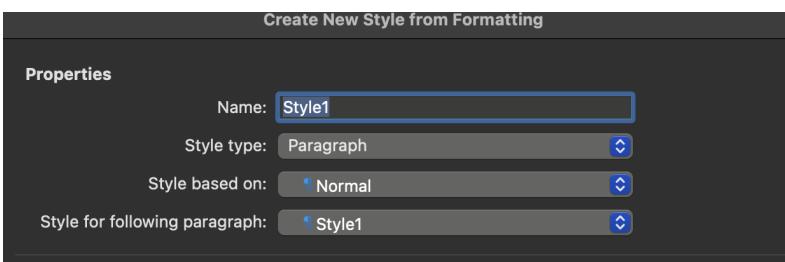


2. Click the **New Style** button above the list of styles.



3. Once you click **New Style**, a window with style options will appear.

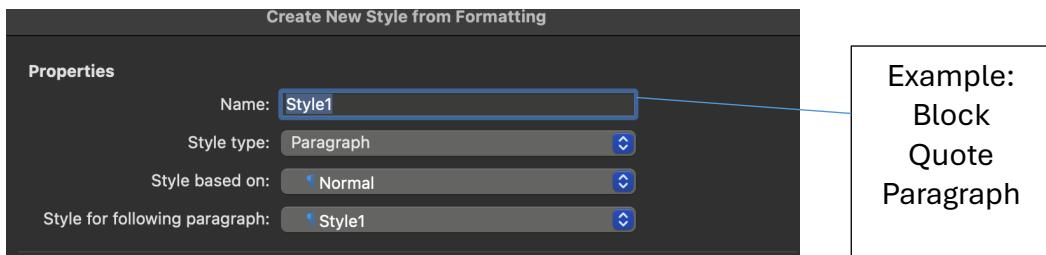
**Note:** To learn how to format your style, see 1.3, Formatting a New Style.



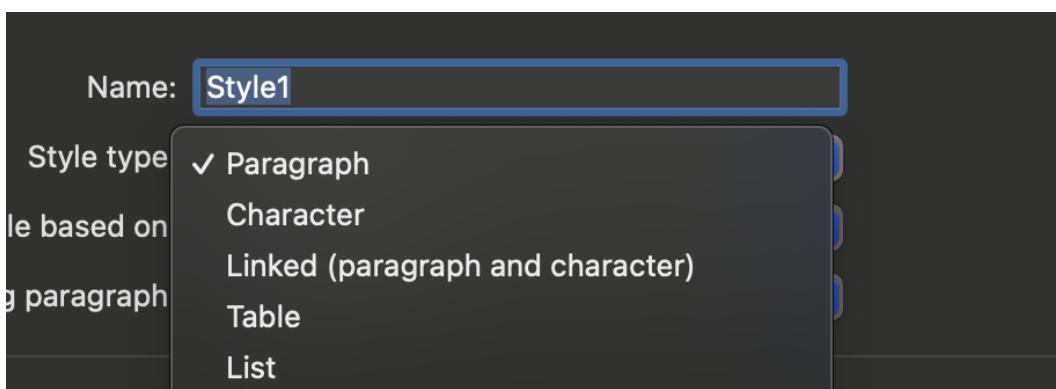
## 1.3 Formatting a New Style

You may want to make specific changes to your style's format by changing the style type, the style based on, the style for the following paragraph, and text font and spacing. This module also contains tips on how to use formatting to create consistency.

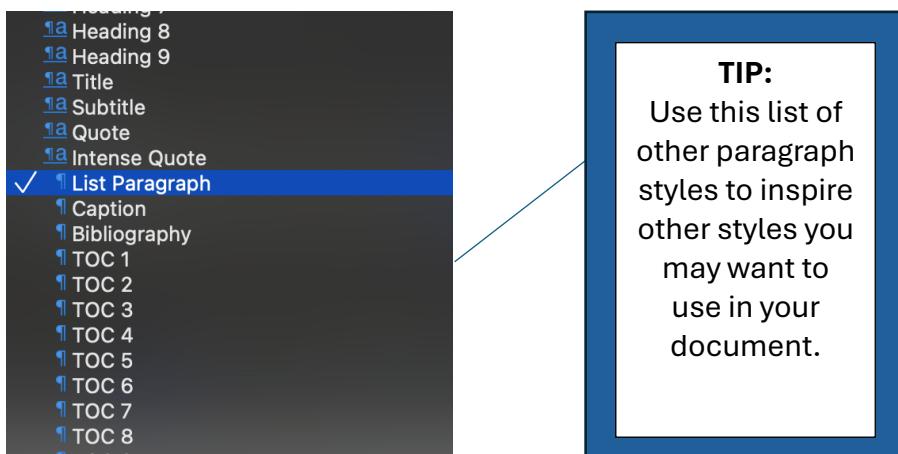
1. On the **Home tab**, click the **Styles Pane**. A styles panel will appear.
2. Click the **New Style** button above the list of styles. A window will appear.



3. In the **Properties Window**, type the name of the style you want to create.
4. In the **Style type**, select which style type you want to use.



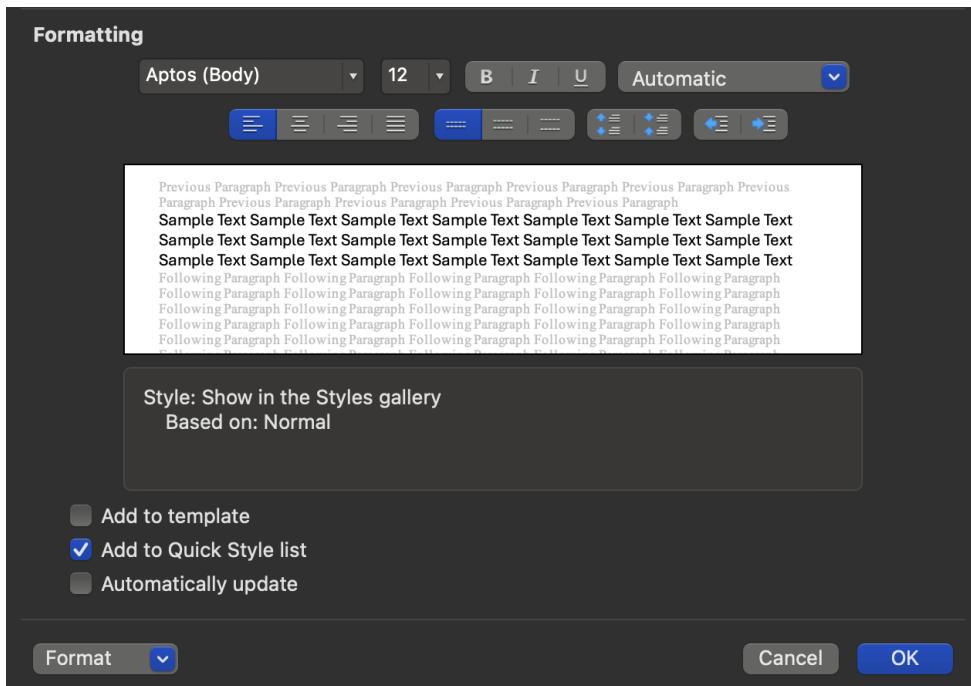
5. Click **Style based on** to use another style set's parameters. A long list of other styles will appear.



**TIP:**  
Use this list of other paragraph styles to inspire other styles you may want to use in your document.

## CHAPTER ONE: APPLYING AND CREATING STYLES

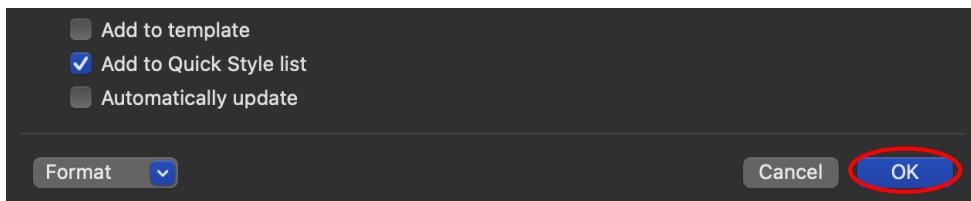
6. In the Formatting Window, edit the formatting options to create your desired paragraphs font size, font type, line spacing, page layout, and the style of the text (bold, italics, underline).



**TIP:** To help create consistency, you can select **Add to template** and/or **Automatically update**.

- **Add to template** means any changes made to this style will be automatically added to the template and the style will appear in all new documents based on that template.
- **Automatically update** means Word updates a document's styles from a template and replaces existing styles with the template's style definitions.

7. Click **OK** to save formatting and create your new style.





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# CREATING A TABLE OF CONTENTS

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CHAPTER TWO



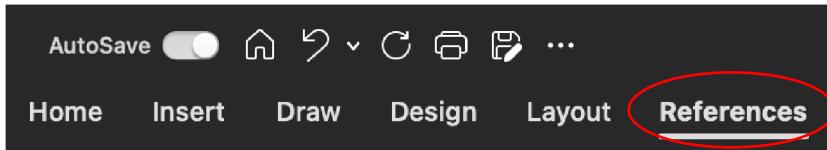
Why did the textbook break up with OER?

Because OER said “I am free and open for everyone!”

## 2.1 Inserting a Table of Contents

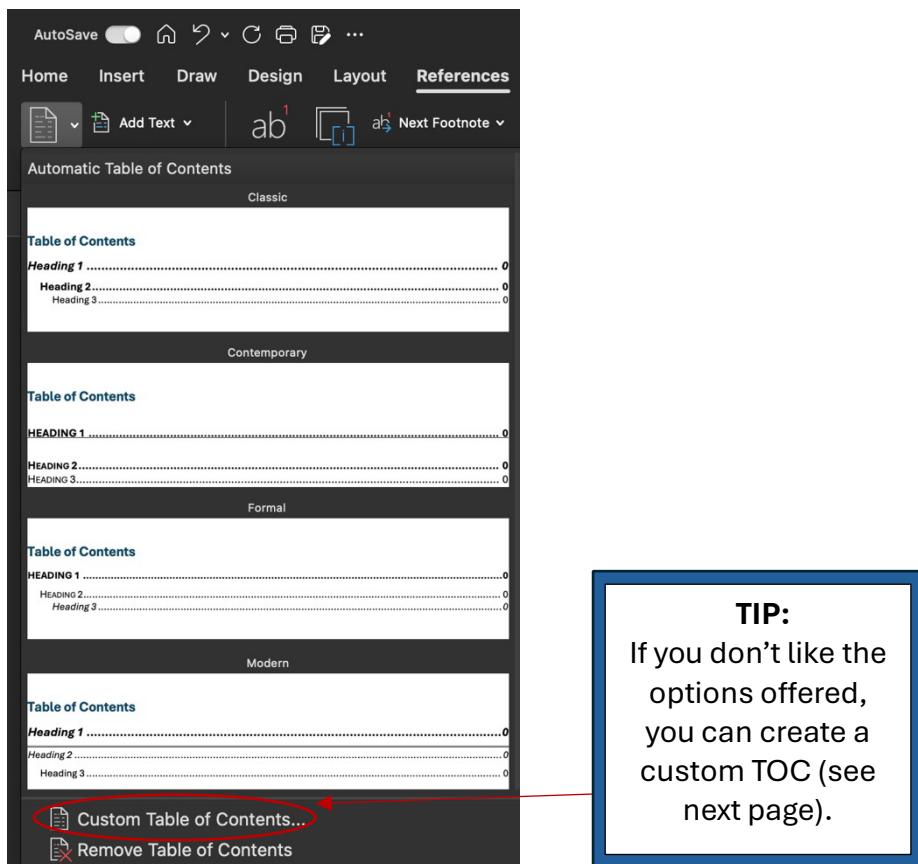
Creating a table of contents (TOC) is particularly helpful for Open Education Librarians because it allows for easy navigation through your document, provides organization for your reader, and improves accessibility by allowing screen readers to jump to a specific section.

1. Place your cursor where you want to add your table of contents.
2. Click **References** in the ribbon.



3. Click the drop-down arrow next to the **Table of Contents**. Styles appear.

**Note:** Depending on the type of document you are creating, your TOC style may differ.



**TIP:**

If you don't like the options offered, you can create a custom TOC (see next page).

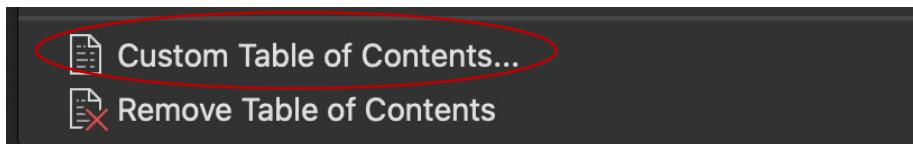
4. Select the TOC style you want to use. The TOC appears on your page.

**Note:** If you have missing entries, make sure all your headings are formatted as Heading 1.

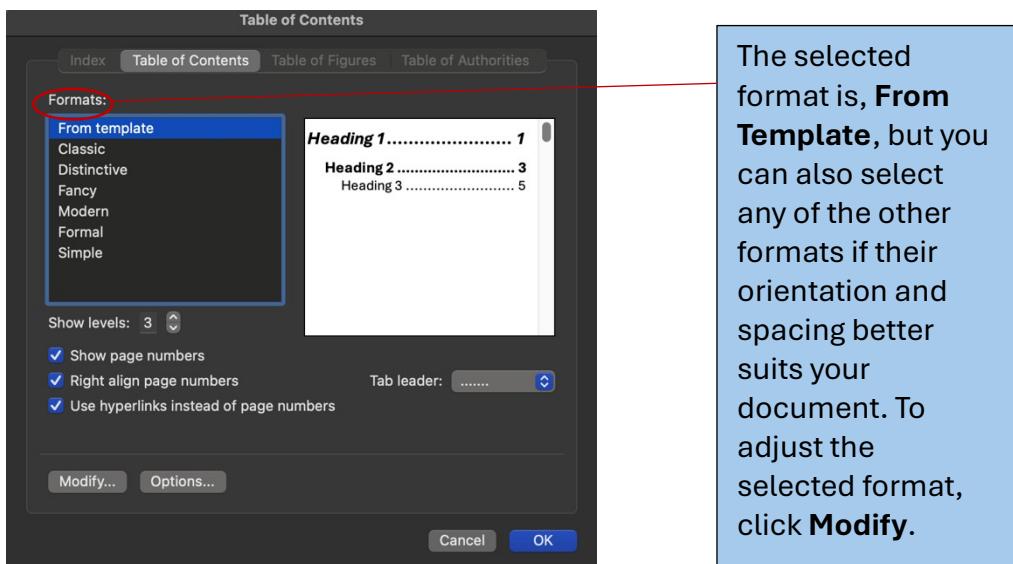
## 2.2 Customizing a Table of Contents

Customize your table of contents' levels, hyperlinks, and other formatting options to improve your TOC. Your style of TOC may differ depending on your document.

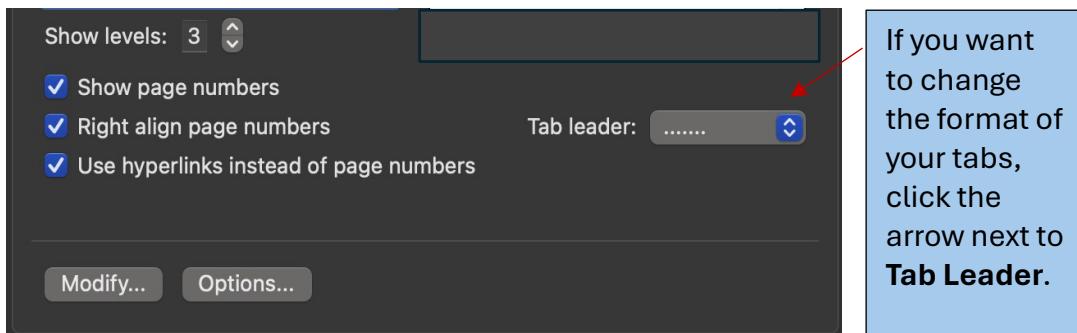
1. Under **References**, click the arrow next to Table of Contents.
2. Select **Custom Table of Contents**. A window opens.



3. Under **Formats**: you can choose how you want your TOC to list each heading.



4. Under **Show Levels** you can select: (1) Show page numbers (2) Right align page numbers and/or (3) Use hyperlinks instead of page numbers.



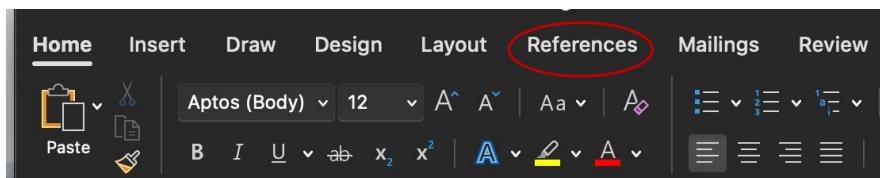
## CHAPTER TWO: CREATING A TABLE OF CONTENTS

5. Select **Use hyperlinks instead of page numbers** to allow easy navigation through your document.
6. Click **OK**.

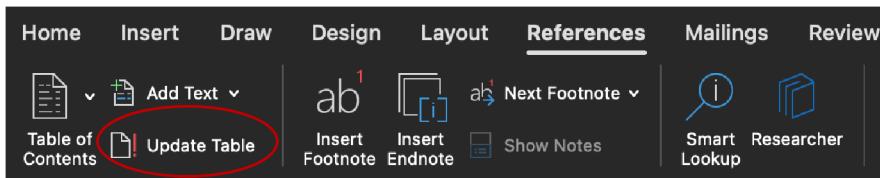
## 2.3 Updating a Table of Contents

Updating your table of contents, for example if you have a running agenda, would be beneficial for Open Education librarians who want to improve navigation, provide updated information, and ensure that the information is current for those who rely on assistive technologies.

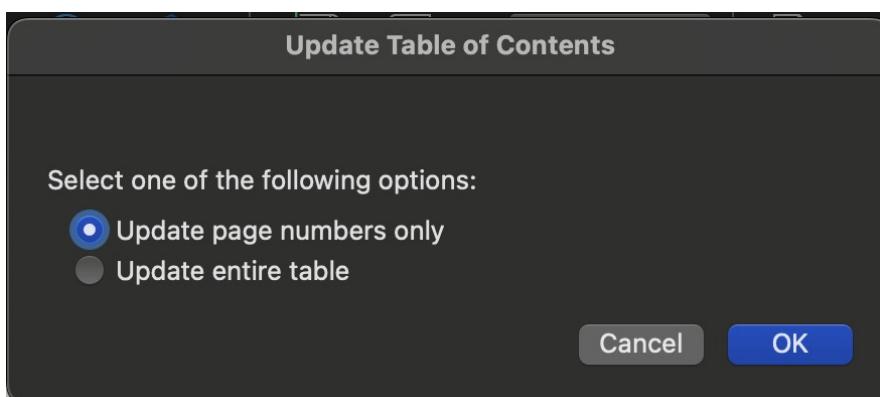
1. On the **Home Tab**, navigate **References**.



2. Click **Update Table** next to the **Table of Contents**. A window opens.



3. Select either **Update page numbers only** or **Update entire table**.



4. Click **OK**.

### Troubleshooting Tip:

To update your entire Table of Contents, select **Update entire table** instead of **Update page numbers only**.



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# INSERTING HYPERLINKS

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## CHAPTER THREE



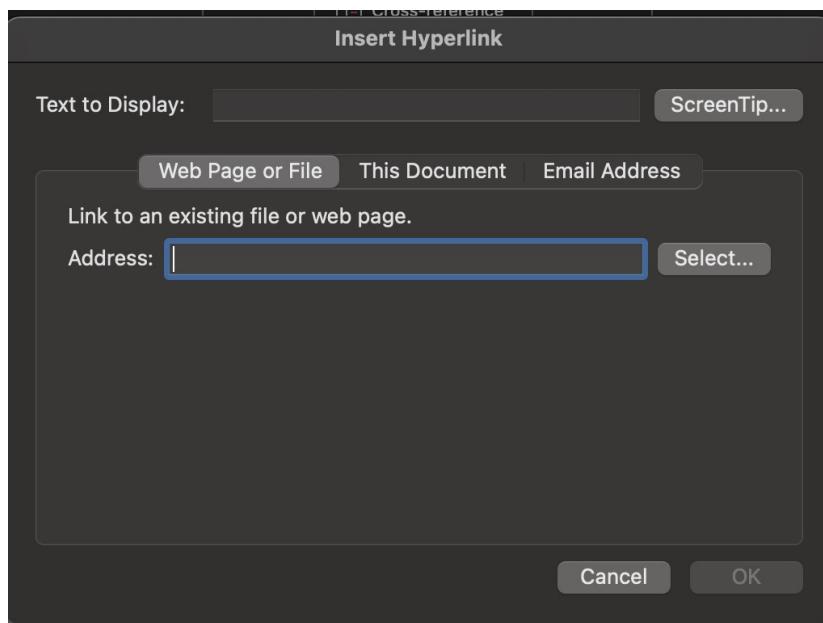
Why was the OER textbook so popular in class?

Because it made all the right connections and didn't charge a fee!

### 3.1 Inserting a Hyperlink

Inserting hyperlinks into your document can be beneficial for providing links to other websites, images, or texts in other documents. Including hyperlinks in your documentation will allow your users to easily navigate to links essential in documents.

1. On the **Home Tab**, click **Insert**.
2. On the ribbon, click **Link**. A window opens.



3. Copy your link and paste it into the **Address** box.
4. In the **Text to Display**: type in the text for your link's name. Ex. OER Agenda
5. Click **OK**. If you added text to the Text to Display you now see that text as the new name for your hyperlink.

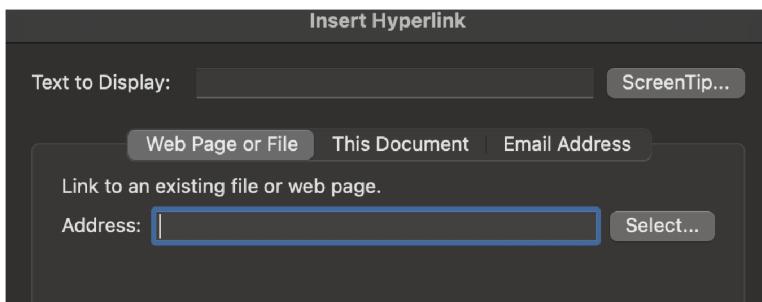
Our OER Agenda has been updated.

**Optional:** To customize the ScreenTip that appears when you rest the pointer over the hyperlink, click **ScreenTip** in the top-right corner of the **Insert Hyperlink** dialog box and enter the text you want.

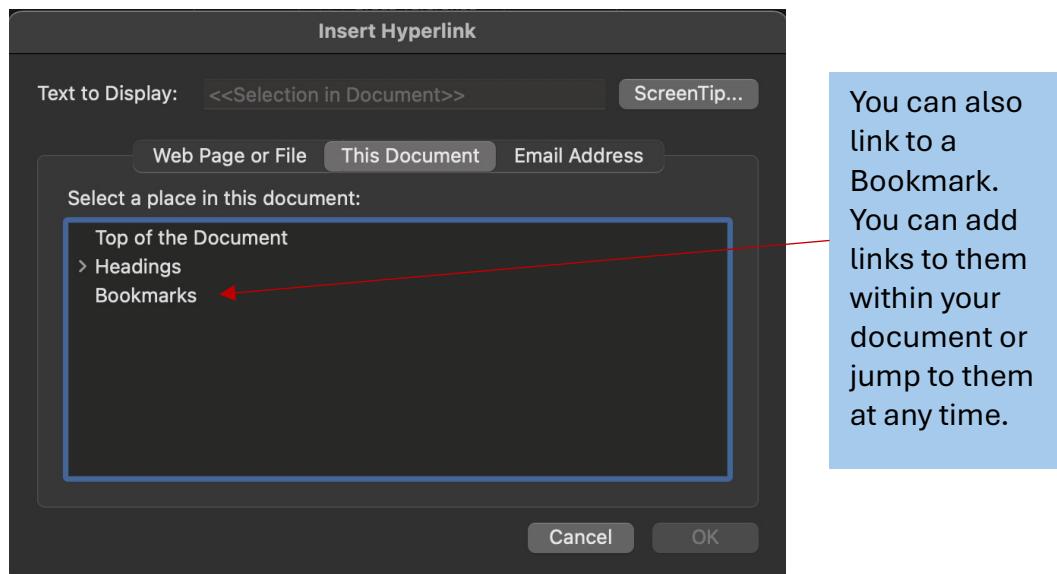
## 3.2 Creating a Hyperlink to a Location in the Same Document

Hyperlinks are useful to help your user access links to other websites, images, or charts, but creating a hyperlink to a location in the current document can increase user navigation throughout your document.

1. Select the text or image you want to display as a hyperlink.
2. Under the **Insert Tab**, click **Link**. A window opens.



3. Select **This Document**.
4. Choose the location in the document where you want the hyperlink to go to.  
**Note:** Double-click on Headings to add to a specific heading or section.

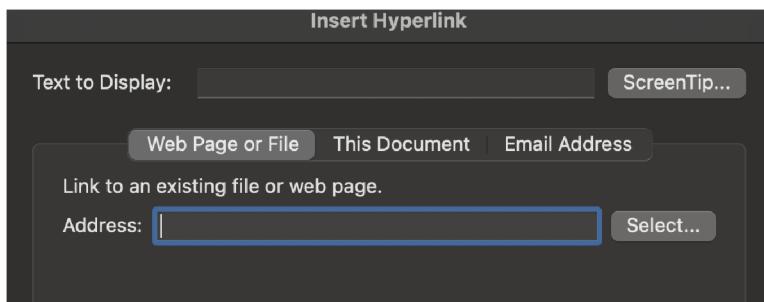


5. Click OK.

### 3.3 Creating a Hyperlink to a Location in Another Document

You can create hyperlinks that link to a Word document or Outlook email message that includes heading styles or bookmarks. You can also link to slides or custom shows in PowerPoint presentations and specific cells and sheets in Excel spreadsheets.

1. Select the text or image you want to display as a hyperlink.
2. Under the **Insert Tab**, click **Link**. A window opens.

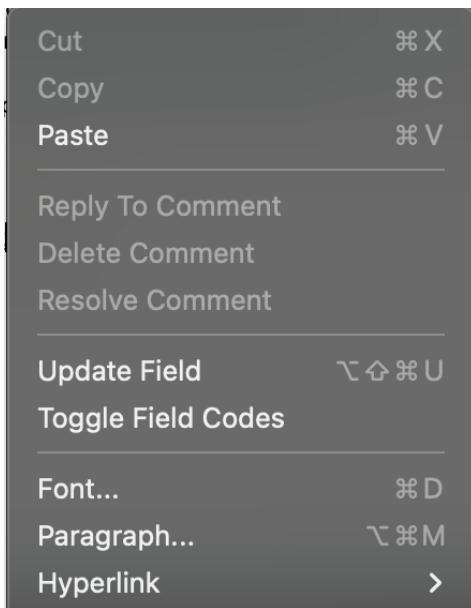


3. Click **Select...** and chose the file you want to link the image or text to.
4. Once you have the file selected, click **OK**.

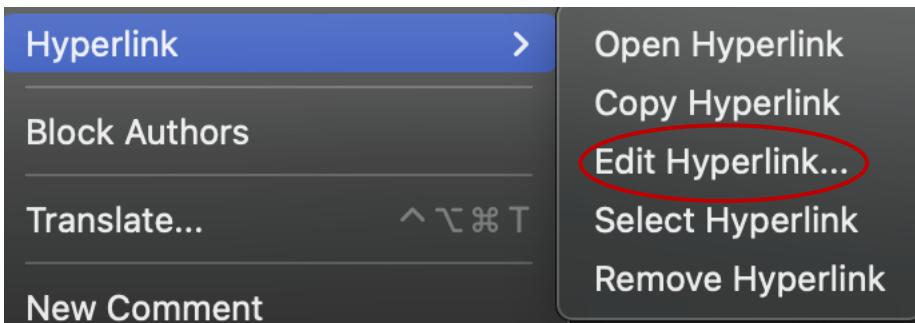
## 3.4 Editing Hyperlink Text

Once you have created your hyperlink, editing the name of your link text can help your readers better understand what the link will bring them to. Make sure to use descriptive words that effectively describe your link.

1. Once your link is pasted into your document, with two fingers, click the link. A pop-up menu appears.

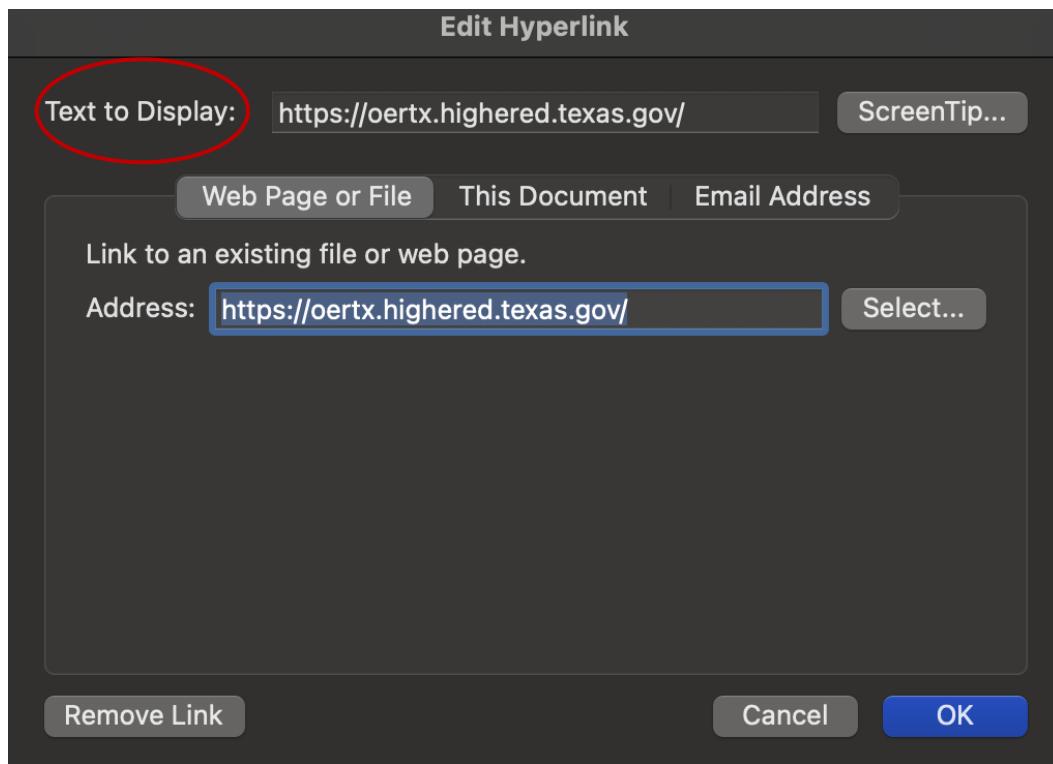


2. Hover your mouse over **Hyperlink** and click **Edit Hyperlink**. A window opens.



## CHAPTER THREE: INSERTING HYPERLINKS

3. Under **Text to Display** type the name you want your link to appear as.



4. Click **OK**. Your link now displays the name you typed into the **Text to Display** box.

Once you have completed these steps, the link should have gone through a transformation like this:

Link Before:
<u><a href="https://oertx.highered.texas.gov/">https://oertx.highered.texas.gov/</a></u>
Link After:
<u>OER Higher Ed Texas</u>



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# CHECKING ACCESSIBILITY

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## CHAPTER FOUR



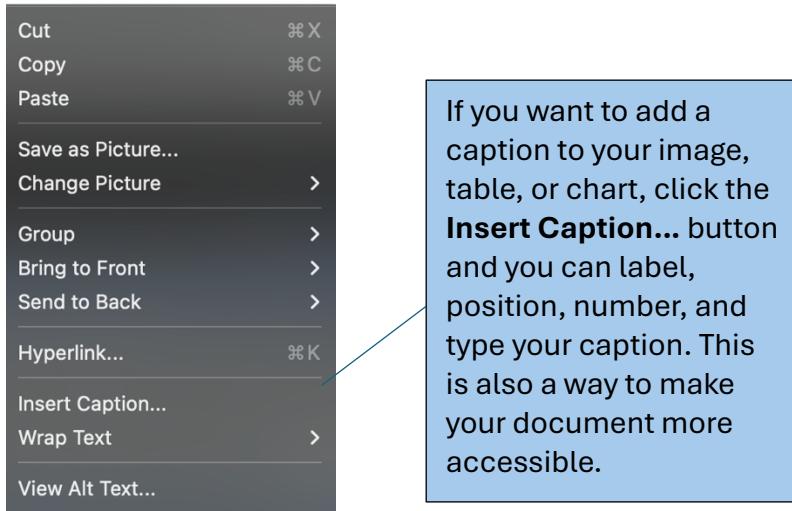
Why did the student bring OER to the party?

It was free and guaranteed to keep it current!

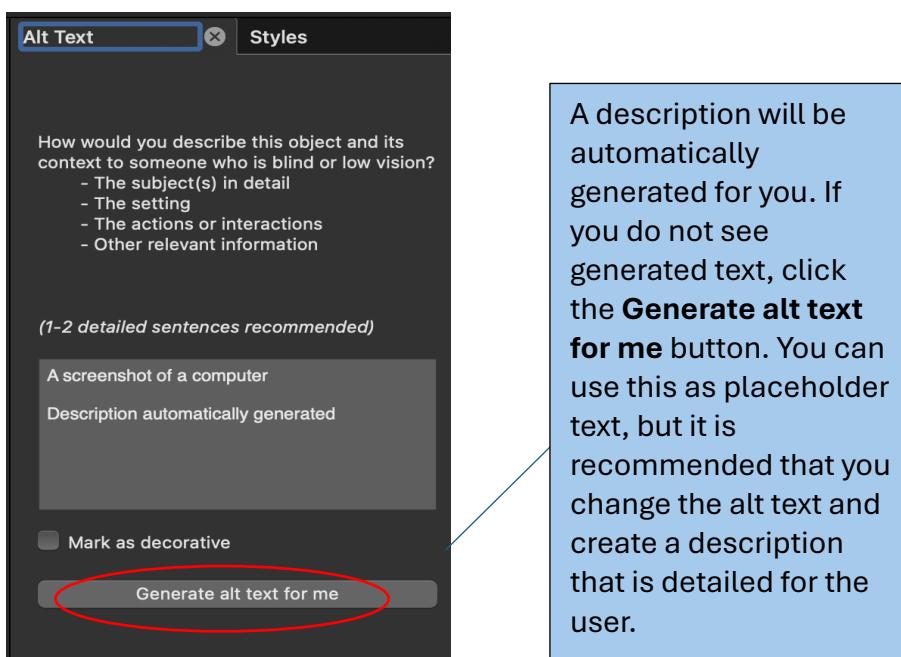
## 4.1 Using Alternative Text for Images, Tables, and Charts

Alternative text is essential for you to create an accessible document. Alt text makes content accessible to people with visual impairments who use screen readers, provides context for images, and enhances the overall user experience.

- Once you have placed your image, table or chart, right click on your pasted object. A drop-down menu appears.



- Click **View Alt Text** at the bottom of the drop-down menu. A side tab will appear with options for your alternate text.



## CHAPTER FOUR: CHECKING ACCESSIBILITY

3. Click on the text box and type in the alternate text that describes the image, table, or chart that the user might not be able to see.

Here is an example of descriptive alternative text written for an image:

### Image:

Open Educational Resources (OERs) provide teachers, learners, & others with legal permissions to engage in the 5R activities.

- ① **REUSE:** Content can be reused in its unaltered form.
- ② **RETAIN:** Users have the right to make, archive, and “own” copies of the content.
- ③ **REVISE:** Content can be adapted, adjusted, modified, or altered.
- ④ **REMIX:** The original content can be combined with other content to create something new.
- ⑤ **REDISTRIBUTE:** Copies of the content can be shared with others in its original, revised, or remixed form.



Lumen Learning, (2019). What are Open Educational Resources? Retrieved from:  
<https://lumenlearning.com/about/whats-oer>



### Alternative Text:

The title of the image reads: Open Educational Resources (OERs) provide teachers, learners, and others with legal permissions to encourage in the 5R activities.

Listed below are the 5R activities:

1. Reuse means content can be reused in its unaltered form.
2. Retain means users have the right to make, archive, and “own” copies of the content.
3. Revise means content can be adapted, adjusted, modified, or altered.
4. Remix means the original content can be combined with other content to create something new.
5. Redistribute means copies of the content can be shared with other in its original, revised, or remixed form.

There is copyright on the bottom of this image that credits: Lumen Learning, (2019). What are Open Educational Resources? Retrieved from: <https://lumenlearning.com/about/whats-oer>.

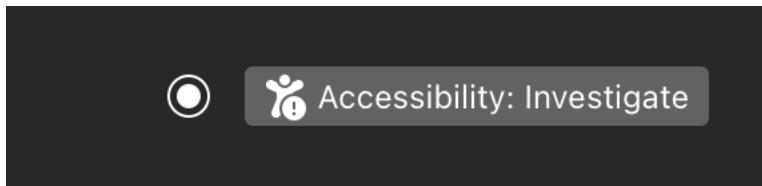
The licensing label is CC BY.

**TIP:** Make sure to be specific and include as many details as you can in your alternate text description. Include the licensing labels that are in the picture so that the user knows if they can reuse, retain, revise, remix, or redistribute this image.

## 4.2 Checking Accessibility

Using the accessibility checker is an important step toward ensuring that educational materials are inclusive. It also promotes equal educational opportunities for all.

1. Click the **Accessibility tab** on the bottom of your screen. A side-window opens.



2. Click the arrow next to each error to be directed to the accessibility issues.

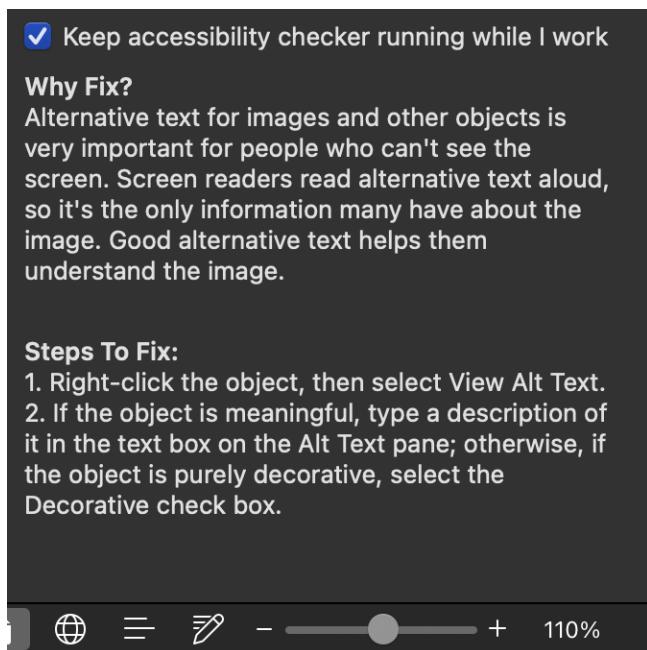
The screenshot shows the Microsoft Word Accessibility side-panel. At the top, there's a search bar labeled 'Search (Cmd + Ctrl + U)' and some sharing options. Below that are buttons for 'Dictate', 'Sensitivity', 'Add-ins', and 'Editor'. The main panel is titled 'Accessibility' and contains 'Inspection Results'. It lists errors, warnings, and intelligent services. Red circles highlight the first three items under 'Errors': 'Missing alt text', 'Hard-to-read text contrast', and 'Review auto-generated alt text'. A red line points from the bottom-left of the 'Review auto-generated alt text' section to a callout box. The callout box contains the following text:

You can choose to select **Keep accessibility checker running while I work** so you can see the accessibility errors as you create your document.

- ✓ Keep accessibility checker running while I work

## CHAPTER FOUR: CHECKING ACCESSIBILITY

3. Scroll to the bottom of the window to read **Why Fix?** And **Steps to Fix:** if you need additional help and want to understand the accessibility issues.



**TIP:** If you need help creating strong alternative text for your images, tables, and charts, go back to 4.1.



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# SAVING AND SHARING YOUR DOCUMENT

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## CHAPTER FIVE



Knock, knock.

Who's there?

OER.

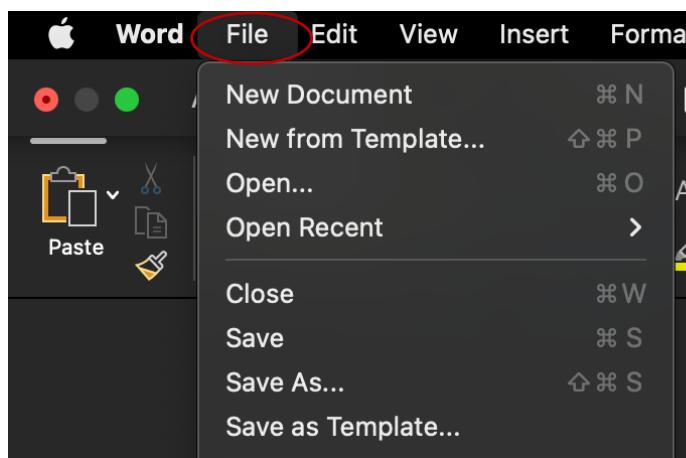
OER who?

Oh, We Are going to have a great day!

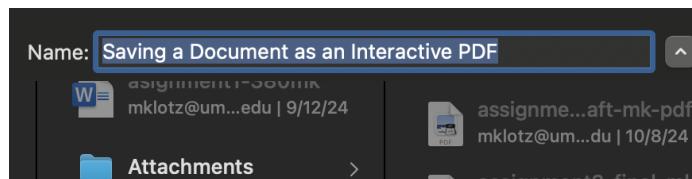
## 5.1 Saving a Document as an Interactive PDF

When saving a document in Word as a PDF, an Open Education Librarian must consider which format of the PDF will be best for their users. The interactive PDF compared to the print PDF is better for accessibility because it allows for additional features such as bookmarks, hyperlinks, alternative text for images, and interactive elements like forms.

1. Under the Quick Access Toolbar, click **File**. A drop-down menu appears.



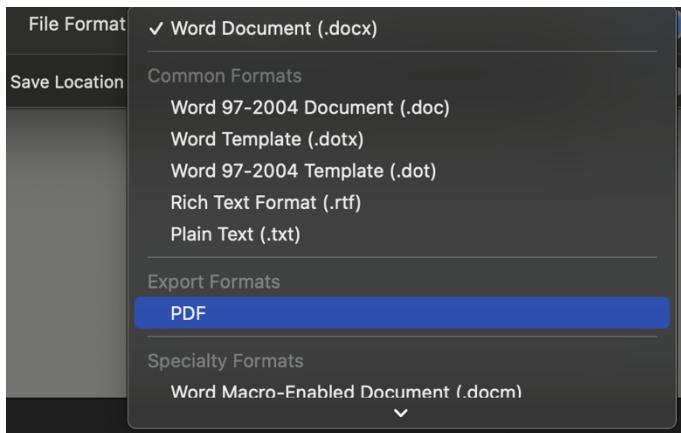
2. Click **Save As**. A window appears.



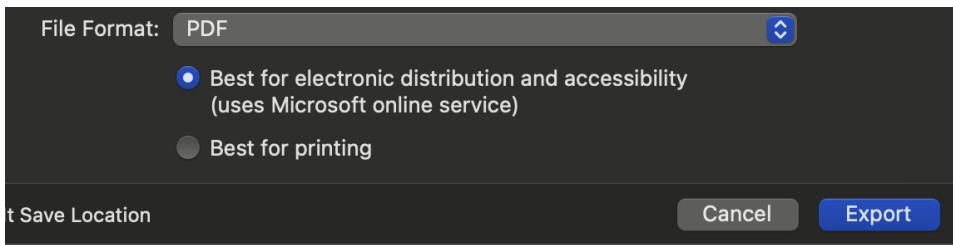
3. Type the name you want to label your PDF.
4. Select the location you want your PDF to save to.

## CHAPTER FIVE: SAVING AND SHARING YOUR DOCUMENT

5. Under File Format, click the arrow and choose **PDF**.



6. Before saving, select **Best for electronic distribution and accessibility**.

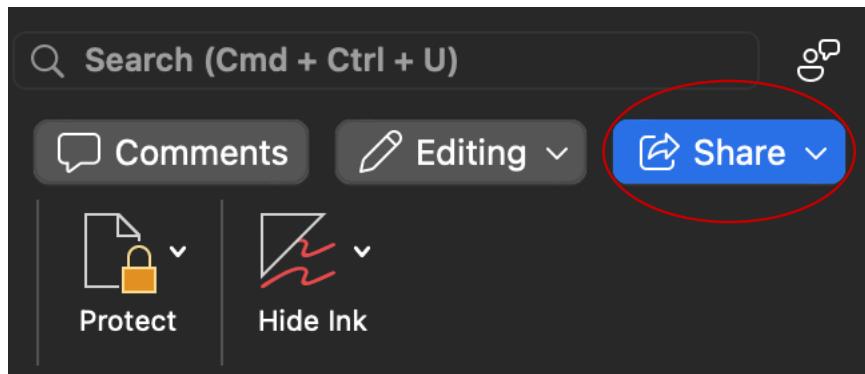


7. Click **Export**.

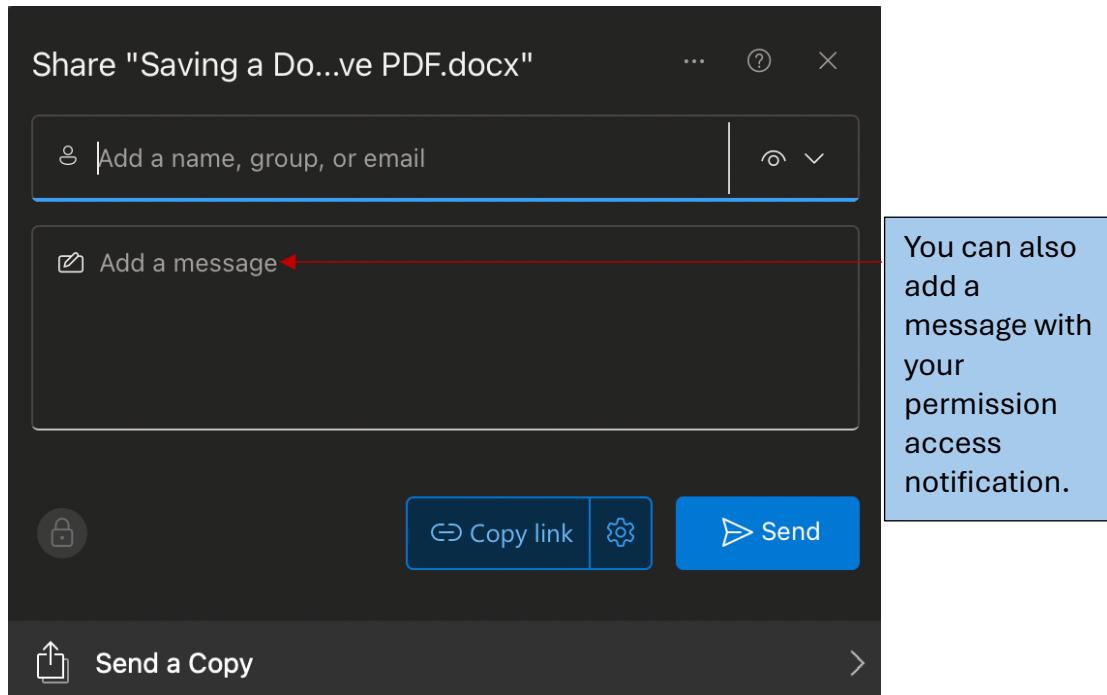
## 5.2 Granting Permission Access Through Email and Link

Granting permission access through email and links has been a common issue across librarians and Microsoft Word users in general. However, in your role as an Open Educational Librarian it is essential that all documentation is shared and accessible.

1. On the Ribbon, click the arrow next to **Share**.



2. Click **Share...** and a window appears.



3. Type the **name, group, or email** you want to share access with.

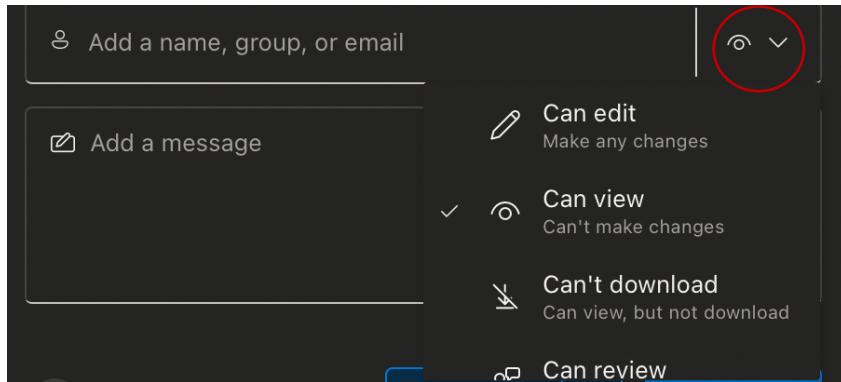
Example Message:

"Here are the updated notes from our last OER meeting. Look at page two for the deadline dates."

## CHAPTER FIVE: SAVING AND SHARING YOUR DOCUMENT

4. Click the arrow next to the **View** icon. Change the access to **Can View** or **Can Edit** depending on your audience.

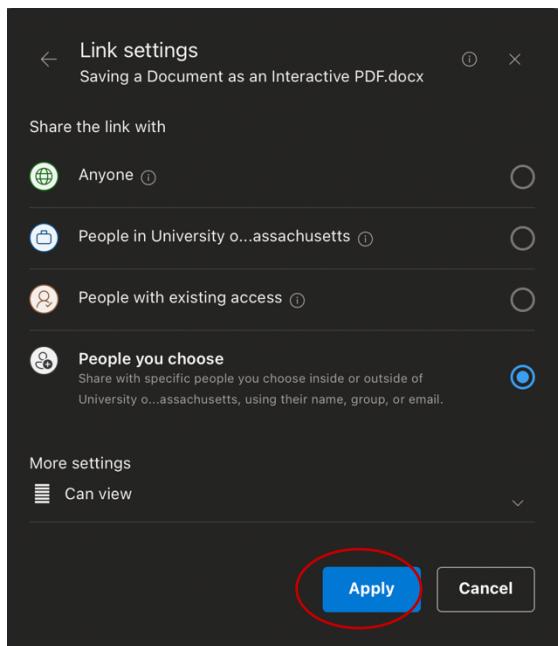
**Note:** Do not select **Can't download** or your document will not be accessible.



5. Click **Copy Link**. Click the **settings** icon next to Copy Link.



6. In the link settings, chose who you want to share the link with. Once selected, click **Apply**.



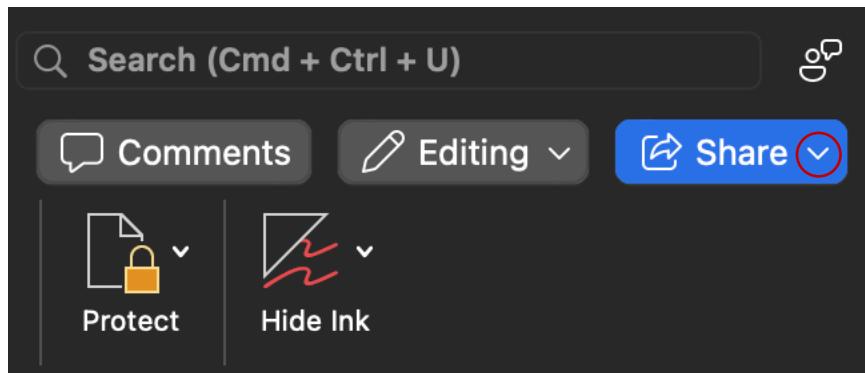
7. Click **Send**.



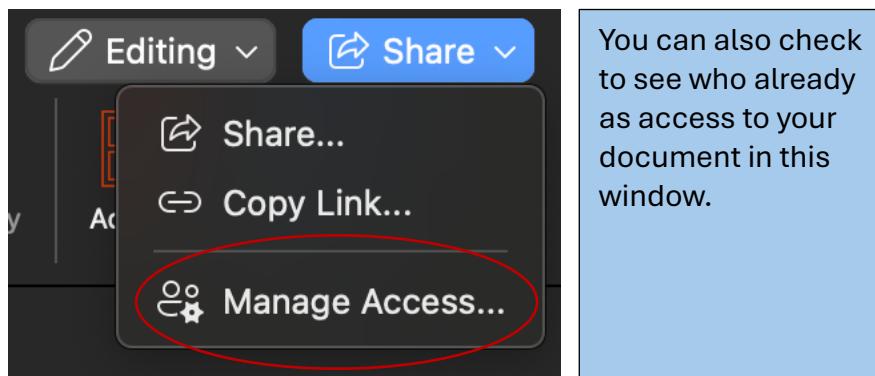
## 5.3 Managing Permission Access

Once you have shared your document and the recipient is having trouble accessing it, you can manage the permission access to see if they are listed or not. Managing permission access also allows you to easily add more people to your view or edit your document.

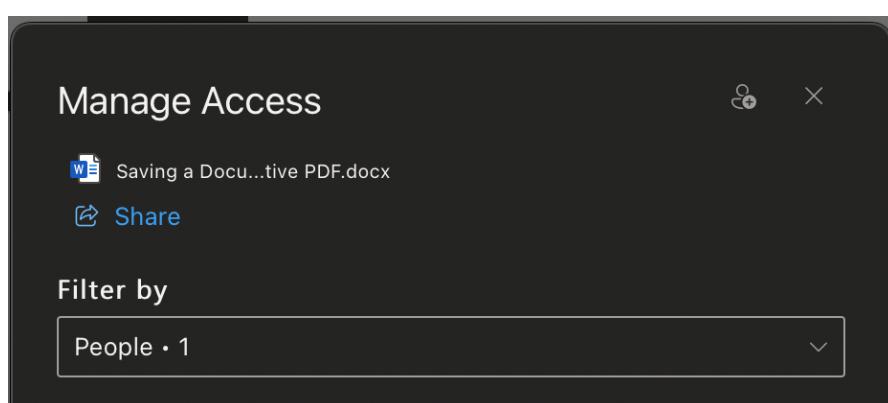
1. On the Ribbon, click the arrow next to **Share**.



2. Click **Manage Access...** in the drop-down menu. A window opens.

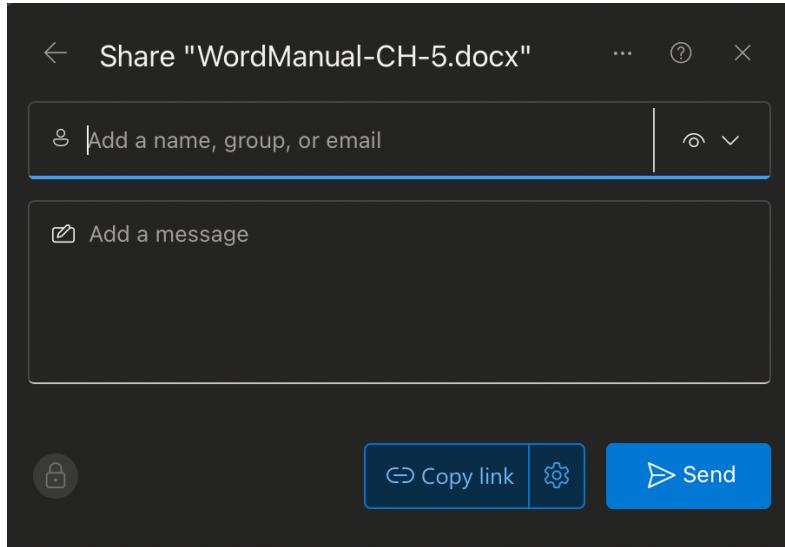


3. Click **Share** to add the email you want to share access with.



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- Type the name of the email address you would like to add (again if it didn't go through the first time).



- Click **Send**.

The cover art and typography of  
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