

Context for Speeding Through Ixus Documents Tutorial

Background

Because of confidentiality agreements, I've had to be innovative to create samples for my portfolio. Tutorials are document types I've written and edited in the workplace, so I wanted to include a tutorial in my portfolio. Because I've included documents for a fake company called Ixus, Inc. in my portfolio, I decided not to complicate the process by trying to create a different company for the tutorial. I used the same company and brand for the tutorial.

- **Audience:** SMEs (project managers, engineers, scientists, and more) who create documents using the base or custom templates at Ixus, Inc.
- **Percentage of I wrote:** 100%.
- **Original content or revised content:** The document is my original writing.
- **Resources for drafting content:** To create the content, I noted common template issues users encountered and tasks that were not so easy for me to do while learning to use the template, especially as someone more advanced in using Microsoft Word than non-technical writers.
- **Content editing:** I edited the document myself as someone confident in my editing abilities because of my background. The document underwent moderate editing.
- **Style guide usage:** A style guide was used to write this document but not a company style guide. Because Ixus is a fake company, I used my generic style guide.
- **Additional useful context, such as deadlines, achievements, etc.:** The template created by the global standards team was not as user-friendly as it could be. It involved content controls, which I had to learn how to navigate and manipulate. There were special practices that had to be completed right to prevent breaking automated controls in the template, which many users were having a hard time with. I spent a lot of time training people individually when they had issues that division-wide training sections were necessary.
- **Changes after publication and why:** No changes occurred after publication.

My Process

I facilitated two virtual, live training sessions for Ixus employees who create project documentation. The visual for the training was a PowerPoint presentation with demonstrations included. To help users perform common tasks in the base templates, I created a tutorial that would detail exactly how to perform the tasks. Although I recorded the live training for those who could not attend and for attendees to review when needed, I didn't go into all the details

included in the tutorial. The goal of the tutorial was to prevent users from having to stop work, ask me to come show them how to resolve template problems, and wait for me to be available.

How I Went Above and Beyond

Because I strive to deliver quality, usable content, I usually do above the bare minimum. I went beyond what is required in the following ways:

- created an aesthetically-pleasing template for the tutorial that enhanced readability.
- included screenshots to make information clearer.
- created a logo for the fake company to indicate a brand and help guide the template colors.
- Created a custom tab for Ixus to fit the guidance in the tutorial.

What I Would Do Differently (or Change)

I would change the template to include numbered headings. Although the sections can be viewed via the Navigation pane when users opt to show the pane, numbered headings are helpful for easy reference when directing users to sections.

Speeding Through Ixus Documents

This tutorial is a resource created to accompany the PowerPoint presentation for the templates training. You can refer to both resources for guidance on using the templates and helpful Word functions.

Goals of this Training

- Help you understand the Ixus technical documentation templates better
- Help you use functions in Word to create documents easier and faster
- Explain some common issues and occurrences you will encounter with the templates

Templates

The documentation team created templates for plans, proposals, reports, and procedures. The templates are available on SharePoint where project documentation resources are stored:

<https://ixus.sharepoint.com/projectdocumentresources/>

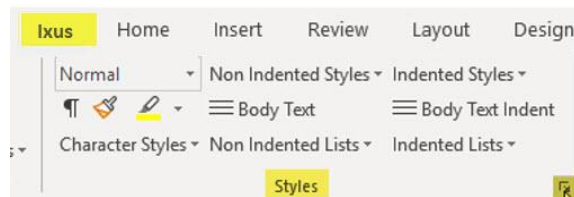
Very Important Components in Formatting Content

There are two important components that are vital to creating documents in Microsoft Word that adhere to Ixus standards: **Ixus** tab and **Style** pane. The **Ixus** tab only works with Ixus templates. The **Style** pane can be used in any document. However, customized or predefined styles for Ixus documents only exist in the Ixus templates.

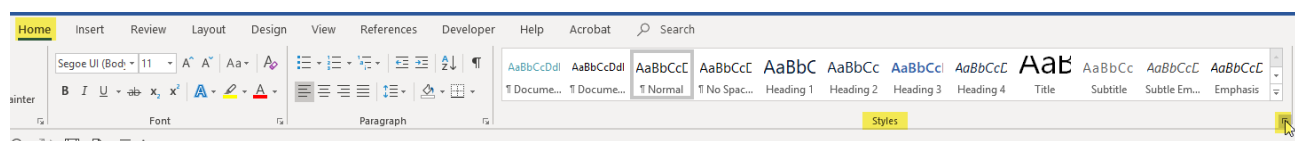
Ixus Tab

The **Ixus** tab is a customized tab that includes commonly used Word functions in one location versus having to search for the functions under many menus, tabs, and so on. This means that all the features in the tab will also be in another location (their original locations), and the features can be accessed via the tab or their original locations.

The images below show an example of a function in the **Ixus** tab that is also available in the **Home** tab. Because styles are important in document creation, the **Styles** menu is in the **Ixus** tab for easier access:

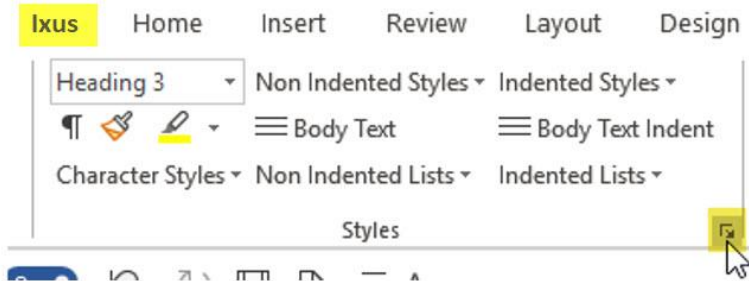


The following image shows the **Styles** menu in the **Home** tab:

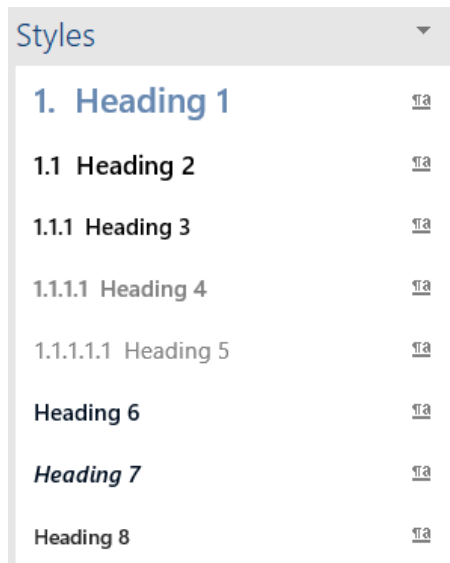


Style Pane

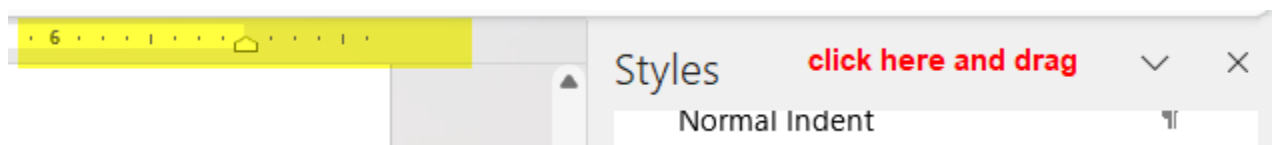
The **Style** pane is the main feature that will help you assign content the correct formatting after pasting content as text only or unformatted text. The **Style** pane can be accessed via the **Home** tab or **Ixus** tab. To access the **Style** pane, click the arrow in the bottom right corner of the **Styles** menu (highlighted in image below).



The **Style** pane will show up on the right side of the screen, appearing as follows:



To dock the pane, you can drag the top of the pane to the right side of the screen, lining up the top of the pane with the ruler at the top of the document. See the following image for clarity.



Ensure that **Show Preview** is checked in the **Style** pane to see the preview of the style. This will help when knowing which style to assign to which content.

| | |
|--|---|
| SmartLink | a |
| SmartLinkError | a |
| Strong | a |
| <input checked="" type="checkbox"/> Show Preview | |

Understanding the Templates

The first thing you may notice when looking in the templates are the blue and tan content controls on the cover page and throughout the document. Content controls are also called “field codes.”

There are two kinds of content controls in the templates: repeating fields and non-repeating fields. A repeating field is for content that will be located somewhere else in the document. The benefit of a repeating field is that when content is added to one, that content is automatically added to the other locations where that field exists. This saves you time when creating documents. Only 15 repeating fields are available for use, which limits how many can be in a document.

Document Control Page

A lot of the information on the document control page will be repeated from the cover page. You will have to fill in what is not automatically filled in and update or change information as needed.

Wherever there is placeholder text in this section, you will need to update the text with the correct information and remove the rows that do not apply to the document.

Letter

A letter exists in the report template. As stated in the standards, this page is optional. The key takeaway for this page that is not as obvious in the template is how the client representative is addressed in the salutation: **Dear** is not used but simply the client representative’s name preceded by Mr., Mrs., or Ms. (Ms. when marital status is unknown). The report example resource in SharePoint and the following image show how the salutation should look.

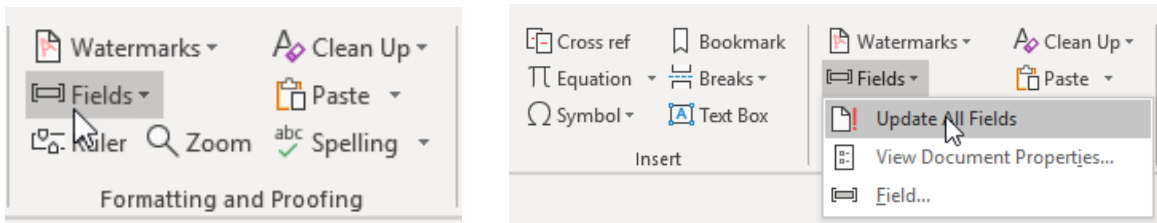
Ms. Jane Doe,

Welcome

A welcome exists in the proposal template. As stated in the standards, this page is optional and can be removed if not needed. This section is like the letter in the report. This is where you welcome the client and the client’s representative. The body of the letter could go here and signature line(s), minus the addresses and date. See the proposal example in SharePoint for more clarity.

Table of Contents (TOC)

There is a function called **Fields** in the **Ixus** tab under **Formatting and Proofing**. Click **Fields** drop-down > **Update All Fields** to easily update all fields in the document. This updates page numbers and all sections of the TOC.



Main Body Content

1. [Heading 1]

The Style pane and **Ixus** tab are very important in ensuring that the correct formatting is in this document. The Style pane is the feature generally used for giving text assigned styles or formatting. Contact technical editor to easily access the pane. All main elements can be assigned the **Ixus**-chosen styles from the Style pane, except Heading 1. The **Ixus** > **Indented Styles** feature must be used for Heading 1, unless most sections are short sections; therefore, the Style pane can be used for Heading 1 to start sections on the same page.

The main body content starts with Heading 1. The style for Heading 1 is already in the template. If you click on the Heading 1 content control, you will see Heading 1 selected in the **Style** pane (blue box around it), informing you what style that text has assigned to it.

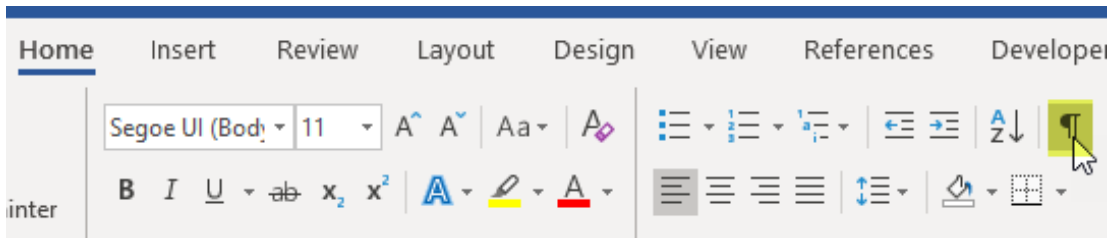
You can copy the main body content from another document into the template's main body content section but will need to be copied using **Paste Special** or the **Keep Text Only** option from the **Paste** function. This will bring in all the content without any formatting. See slide 15 in the PowerPoint presentation for various ways to do so.

Warning

Pay attention to the bookmark (red text) that states to not put text below it. You must add all main body content before the bookmark located in the main body content section. The same goes for the front matter content and the first bookmark (located after the TOC).

Note

The **Show/Hide** feature is a helpful feature that shows any hidden elements that could be in the content: **Home** menu > **Paragraph** section > **Show/Hide** button (see following image).



To give a section of text or one line of text the correct formatting, you can click in the section or in the line of text or highlight the section or line to apply the style.

Example of clicking in the section or line of text (notice cursor below):

If you are going to fill in this section, ensure all abbreviations in the document are included. If you are not going to ensure that it is complete, just remove the section. Don't half do it. Either way, whenever an acronym is used for the first time, it should always be spelled out.

Example of highlighting a section of text:

If you are going to fill in this section, ensure all abbreviations in the document are included. If you are not going to ensure that it is complete, just remove the section. Don't half do it. Either way, whenever an acronym is used for the first time, it should always be spelled out.

Either method will work when wanting to apply a style. Simply click on the style in the **Style** pane, and the text will be formatted based on the style.

Styles for Main Body Content

- Main body text – Body Text Indent
- First level bullets for main body text – List Bullet Indent
- Second level bullets for main body text – List Bullet 2 Indent and so on for third level, etc.
- Headings – 1. Heading 1, 1.1 Heading 2, 1.1.1 Heading 3, 1.1.1.1 Heading 4, etc.
- Table text – Table Text
- Table headings – Table Heading
- Table subheadings – Table Subheading
- First level table bullets – Table Bullet
- Second level table bullets – Table Bullet 2

Note

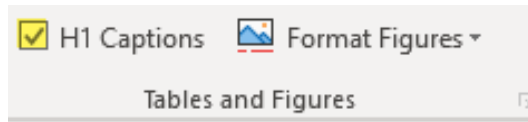
Numbered lists should be inserted from the **Ixus** tab: **Styles** section > **Indented Lists** dropdown or **Non-Indented Lists** dropdown. Because the main body text is normally indented, use the **Indented Lists** function most of the time.

Inserting Tables and Images in Main Body

Inserting tables and images that fit Ixus document standards has been simplified through the **Ixus** tab. To ensure that images and tables have the look that fits the Ixus brand, only insert them using the **Ixus**

tab. Use the **Insert Table** function for tables and **Format Figures** function for images in the **Tables and Figures** section.

Ensure that the **H1 Captions** box is checked to include the section number in the table/figure numbers. If not, the tables and figures will be numbered consecutively as 1, 2, 3, etc. instead of 1.1, 1.2, 1.3, etc.



Using the **Ixus** tab to insert tables and figures also ensures that table/figure titles will be listed in the TOC because the caption numbers are field codes connected to the TOC. If you want to insert an image or table that should not be listed in the TOC (not part of main body content), avoid using the functions in the **Ixus** tab. This is especially the case for appendices because they are not part of the main body content. A simple copy/paste will work for images in appendices. Removing the caption for the table and adding a heading or caption manually will work for tables in appendices.

Copying and Pasting Tables from a Different Format

There is a quicker way to ensure a table has the correct format when copying and pasting tables from another format into a new **Ixus** template. Copy/paste the table > **Ixus** tab > **AutoFormat Tables** dropdown and choose the format that best fits your table. You can then edit the table (merging cells, adding a notes row, etc.).

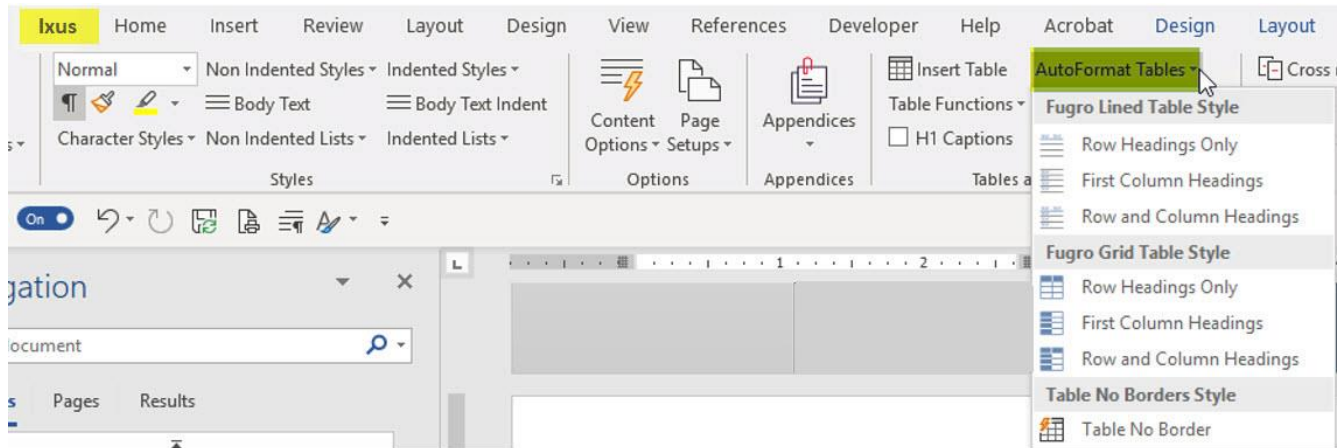
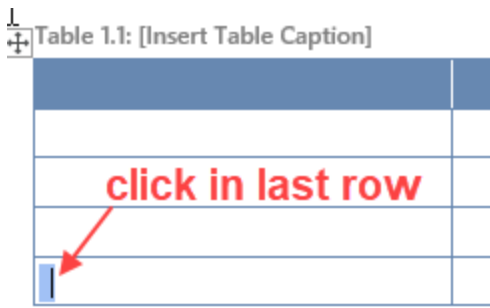


Table Notes Section

If a Notes section is needed in a table, that row will have to be counted when selecting the number of rows after clicking **Insert Table**. Also, the Notes row will have to be inserted using the **Ixus** tab before merging any other cells. If inserted from the **Ixus** tab, the Notes section will have the correct font color and size. If you forget to add the Notes row before merging cells, you will have to add and format the Notes section manually (merge cells, change font size, and ensure font color and size are correct).

To add the Notes section, perform the following steps:

1. Either highlight the last row or click in the last row (row you counted for the Notes section).



-OR-

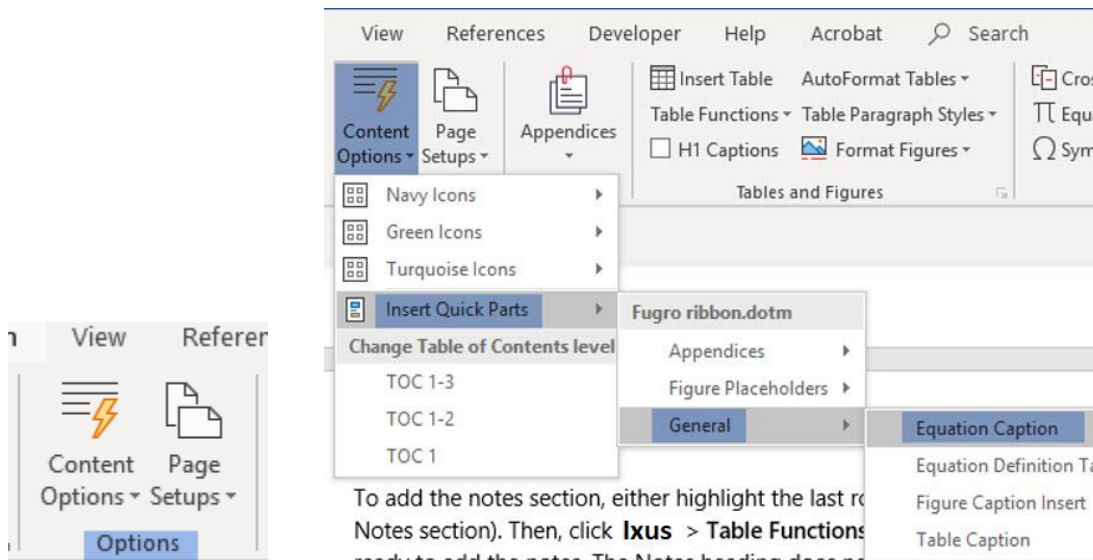


2. Click **Ixus > Table Functions** dropdown > **Add Table Notes**.

That row will be ready for notes. The **Notes** heading does not have a style in the **Style** pane. You will have to format the heading manually by following the Inserting Tables guidance on the documentation team's SharePoint page.

Inserting Equations

Inserting equations is available in the **Ixus** tab and is the same as from the **Insert** tab: **Insert** tab > **Equations** or **Equation** dropdown. However, the caption for equations does not automatically insert with the equation. To insert the caption for equations, in the **Options** menu, click on the **Content Options** dropdown > **Insert Quick Parts** > **General** > **Equation Caption** as shown in the following images:



Appendices

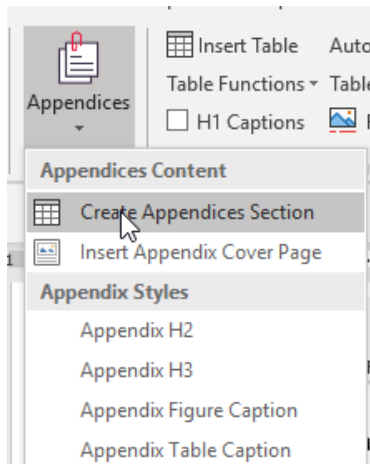
Some templates have at least one appendix already added because those documents typically have appendices. If a template does not have an appendix section or if more appendices are needed, these can be added from the **Ixus** tab.

If an appendix section does not exist, perform the following:

1. Ensure that the appendix is added after the bookmark by placing the cursor after the bookmark.
Cursor shown after the bookmark:

Do not put content past this point

2. Click **Ixus** tab > **Appendices** dropdown > **Create Appendices Section**. This will add Appendix A.



You will likely have to add the first line of the footer (shown in following image) from a previous page to Appendix A to ensure the appendix footers match the rest of the document. Check footers in appendices to make sure they are correct.

[Document No.] | Rev [0] | [Project Title] [Document Type-Ex: Report or Statistical Report]

To add additional appendices, click **Ixus** tab > **Appendices** dropdown > **Insert Appendix Cover Page** (second option in image above). This is the method for all other appendices after Appendix A.

Table of Contents and Appendices for Report Templates

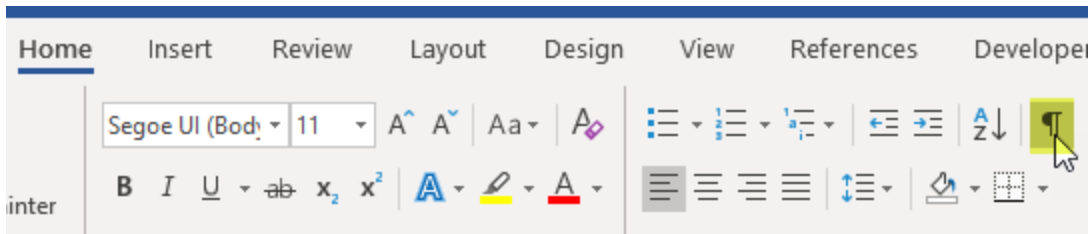
Titles added to the appendix cover pages will be automatically added to the Appendices section in the TOC when using the `ixus_report_template.docx` file/template.

Appendix A for Proposal Template

Like the proposal cover page, there is an image placeholder for Appendix A in the proposal template. You can remove this placeholder if the placeholder was removed from the cover page because no relevant image is available. However, if you included an image on the cover page, you can use the same image for Appendix A or a different image. You can move the image around in the placeholder to show a more interesting section of the image if needed. However, be careful not to move the image container box.

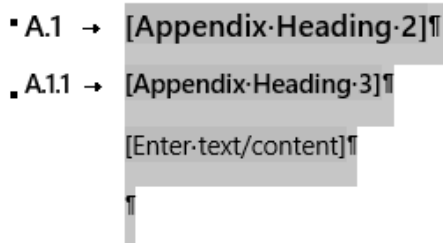
Removing Unneeded Appendix Text Pages

The techniques used for removing appendices matter in ensuring that unneeded pages are removed. When removing appendices, seeing section breaks and other hidden elements are important to ensure all necessary elements are removed. The **Show/Hide** feature needs to be on to see hidden elements (shown in the following image).



Add all the needed appendices before removing any unneeded text pages. This will make the removal process easier. If only cover pages are needed after adding all appendices, remove the pages by performing the following steps for each appendix you want to remove:

1. Highlight all text from the top of the page to the last paragraph mark or line of text.

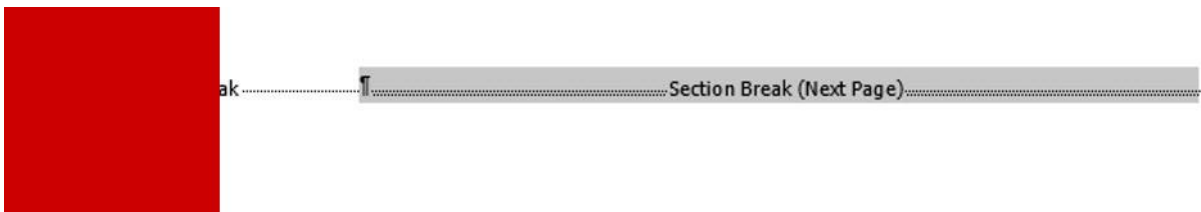


2. Press the **Delete** button. The page will still be there.
3. Press the **Backspace** button. The page should be deleted.

Removing an Appendix Cover Page (if Needed)

After you have added all needed appendices and removed the text pages to have only cover pages and you realize you do not need an appendix cover page, perform the following steps.

1. Starting at the appendix cover page before the appendix you want to remove, highlight the section break as shown below.



2. Drag from the section break on down to the appendix cover pages you want to remove. The following image shows the next appendix cover page highlighted along with Appendix C:



There will likely be a page left over.

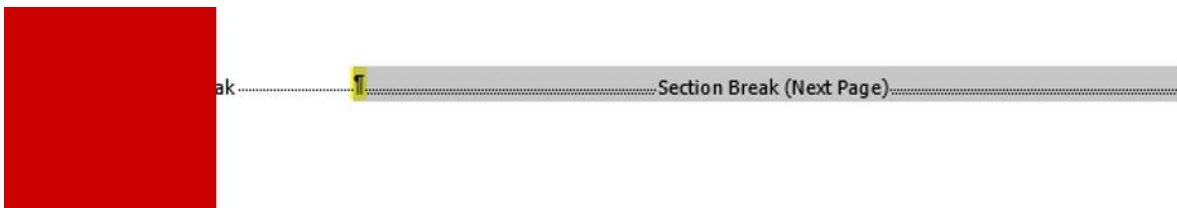
 **put cursor here
and hit Backspace**

The page remaining page should be removed.

Adding Text Pages Back to Document if Needed

If you realize you need a text page and have already removed the text page, perform the following steps:

1. Put your cursor in front of the section break on the appendix cover page (highlighted in image below).
2. Hit the **Enter** button. This will result in a blank page where you can add text for an appendix.



This process will be different if there is only one appendix cover page: Appendix A. If you realize you need a text page and have already removed the text page, perform the following steps:

1. Click on the cover page somewhere around the area shown in the image below. The gray area in the image below is the top of the page:

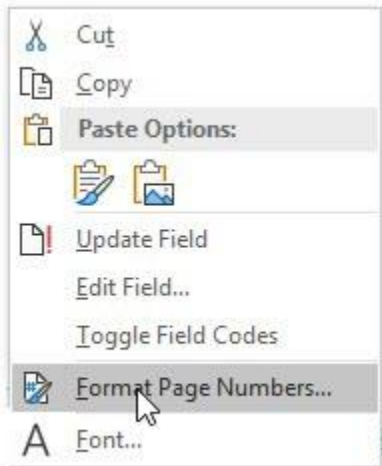


2. Ensure the result is what is exactly shown above: only a paragraph mark.
3. Insert a section break: **Layout** > **Breaks** dropdown > **Next page**.

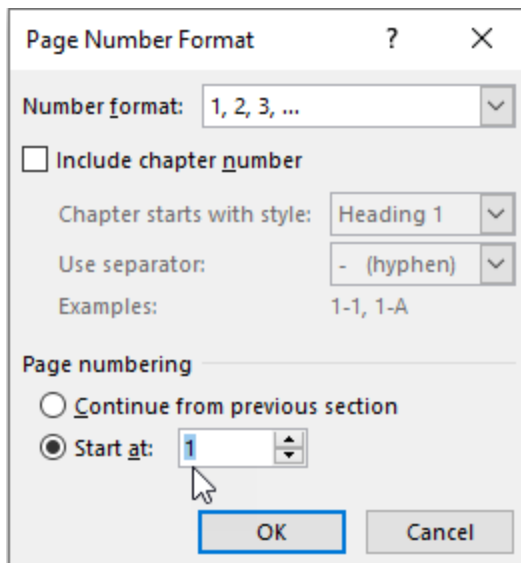


The result will be a blank page for text.

4. Ensure that the page number starts at 1. If not, right-click on the page number, and select **Format Page Numbers**.



5. Change the **Start at** number to 1 as shown in the following image.



Important Links for Document Creation

- Project Documentation Resources
<https://lxus.sharepoint.com/projectdocumentresources/>
- Ixus Document Standards
<https://lxus.sharepoint.com/standards/>