Formatting your thesis document in Microsoft Office Word

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1 Introduction

Microsoft Office Word has built-in document structuring tools that can be used to format your document. This guide outlines several built-in tools that can be applied to structure your document.

Note: These instructions were written using Microsoft Office 365 Word running on a Windows operating system. Tool location and availability of options may vary depending on software version and operating system.

1.1 Digital accessibility

Creating accessible digital resources promotes equitable access, discovery, understanding, interaction, and use of the resource by all users, without barriers or burden. 1 in 4 people experience disability which can impact and even place barriers on how they interact with, interpret, and use your thesis document. People with disabilities may use assistive technologies (e.g., screen readers, text-to-speech and voice command technologies, screen magnifiers) to access and interact with your thesis. By making your thesis more accessible, you promote access for all users, in turn encouraging wider usage of your thesis by a broader audience. Not only is it good practice, but it is also a legal obligation as required by the Accessibility for Ontarians with Disabilities Act (AODA). Please note that all content deposited in the Atrium Institutional Repository, including your thesis, must be compliant with accessibility standards as required by the AODA.

By using built in formatting in Word, as described in this guide, you can improve the accessibility of your thesis document.

1.2 Thesis formatting requirements

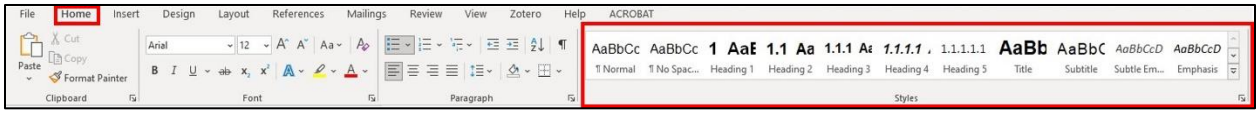
Please refer to the Office of Graduate & Postdoctoral Studies (OGPS) Thesis Completion Guide for specific requirements related to the format of your thesis. An accessible thesis templates are also available on OGPS' Preparation of your Thesis page, which has been pre-formatted to adhere to OGPS' ETD formatting requirements.

2 Formatting

2.1 Creating chapters and sections using Styles

When creating chapters and/or sections in your document, use heading **Styles** to organize and provide hierarchical structure to the document. Additionally, by applying heading styles to your document, you will be able to automatically generate a Table of Contents based on the defined headings.

Styles are located under **Home** in the main menu, within the **Styles** section of the toolbar.



Use the styles Heading 1 to Heading 6, to create sections and sub-sections in your document.

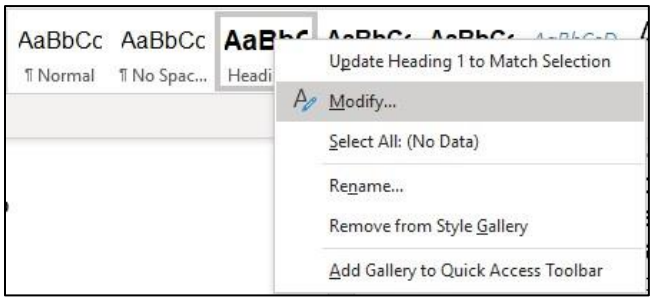
When using styles, keep in mind:

- A pre-defined style can be modified (e.g., change font size, line spacing).
- A new style can be created.
- Heading styles must be nested properly.
- Heading 1 should only be used once in the document.
    - Use Heading 1 for the thesis title on the title page of the document.

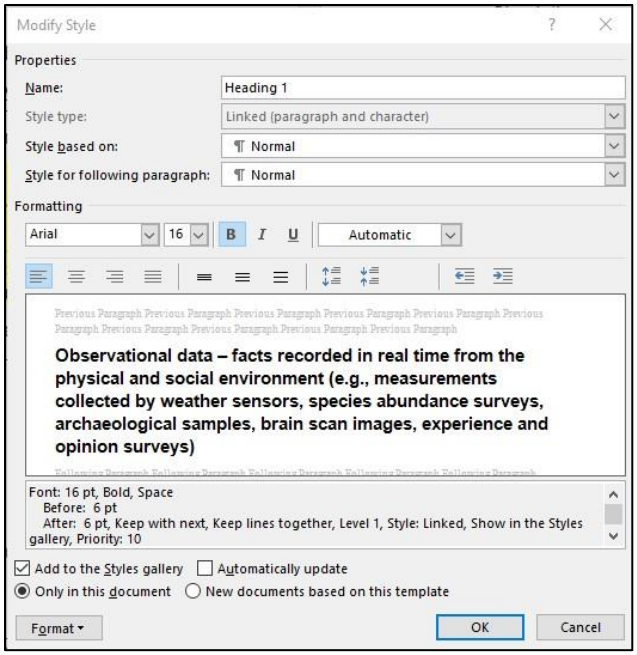
2.1.1 Modify a style

To modify a pre-defined style:

1. Select Home in the menu bar, right click on a style name in the Styles section of the toolbar and select **Modify** from the drop-down menu.



2. Adjust the options in the **Modify Style** window as required.



3. To set paragraph and line spacing, click on the **Format** button at the bottom of the **Modify Style** window and select **Paragraph**.

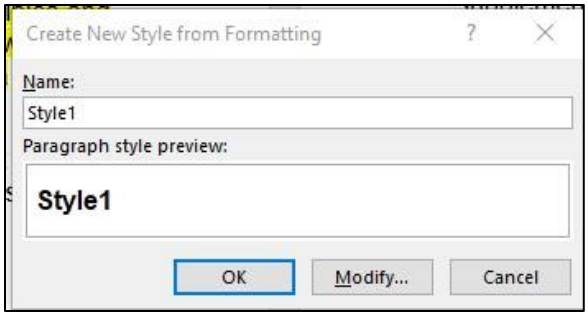
2.1.2 Create a new style

You can create your own styles.

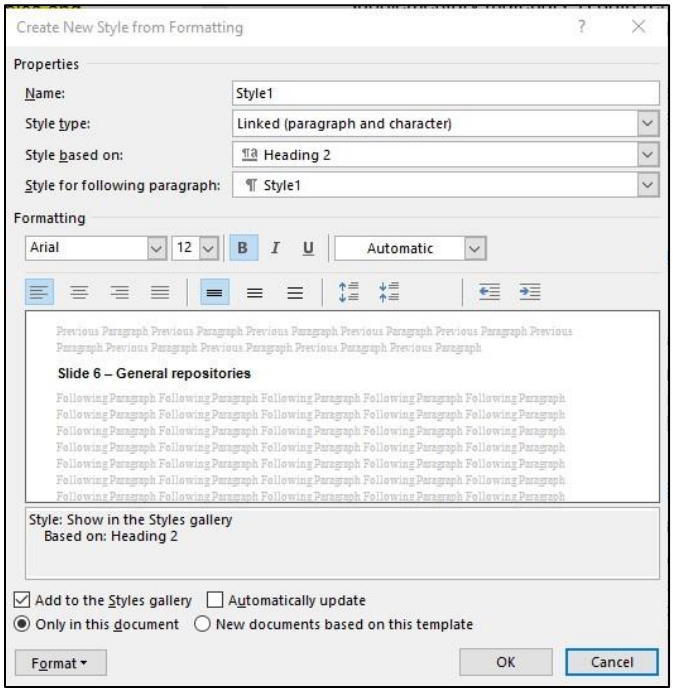
1. Expand the Styles options by clicking on the drop-down arrow on the bottom right of the tool bar.

2. Select **Create a Style** from the list.

3. In the **Create New Style from Formatting** window, add a name for the style.



4. Click on **Modify**.
5. In the **Create New Style from Formatting** window adjust the settings as required.
6. Note, when you create a new style, it will automatically be assigned the same properties as the style you previously working in. Use the **Style Type** and **Style Based On** options in the Modify window to adjust the style properties.
7. To set paragraph and line spacing, click on the **Format** button at the bottom of the **Create New Style from Formatting** window and select **Paragraph**.



2.1.3 Nesting heading styles

Headings can be used to organize your document into sections and sub-sections. Web browsers, PDF viewers, and assistive technologies (e.g., screen readers) use headings to provide in-page/in-document navigation.

When using headings, kind in mind:

- Nest headings by their rank. For instance, when creating a nest of sub-sections, Heading 1 should be followed by a Heading 2, which should be followed by a Heading 3, which should be followed by a Heading 4, etc.
- Headings with equal or higher rank start a new section while headings with a lower rank start new sub-sections within a higher ranked section. For instance, Heading 2 can be followed by another Heading 2. Or, if you wish to create a sub-section, Heading 2 would be followed by a Heading 3.
- Heading ranks should not be skipped. For instance, Heading 2 cannot be followed directly by Heading 4.

The following is an example of appropriately nested headings.

<Heading 1>

<Heading 2>

<Heading 3>

<Heading 4>

<Heading 2>

<Heading 3>

<Heading 2>

<Heading 2>

1 « Title of First Chapter – uses Heading 2 »

« The format of this template supports a monograph-based thesis. A monograph-based thesis should include an introduction, a comprehensive review of literature, methodology, research findings, a comprehensive scholarly discussion of the research findings, and conclusions. The formatting requirements for a monograph-based thesis must align with the general formatting requirements as outlined in the Office of Graduate and Postdoctoral Studies Preparation of your Thesis guide.

Please refer to the 'Formatting documents in Microsoft Office Word' guide for more detailed instructions related to using built in tools in MS Word to format and make your thesis document more accessible.

Use Styles to delineate sections within the chapter. You can use a numbering system if you wish. Below is an example of using Styles to create sections and sub-sections. Add or remove sections and sub-sections as required. Adjust the heading titles as required.»

1.1 « Title of section – uses Heading 3 »

« Use the Normal Style for text. »

1.1.1 « Title of section – uses Heading 4 »

« Use the Normal Style for text. »

1.2 « Title of section – uses Heading 3 »

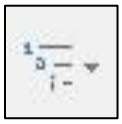
« Use the Normal Style for text. »

2.2 Automatically number chapters and sections

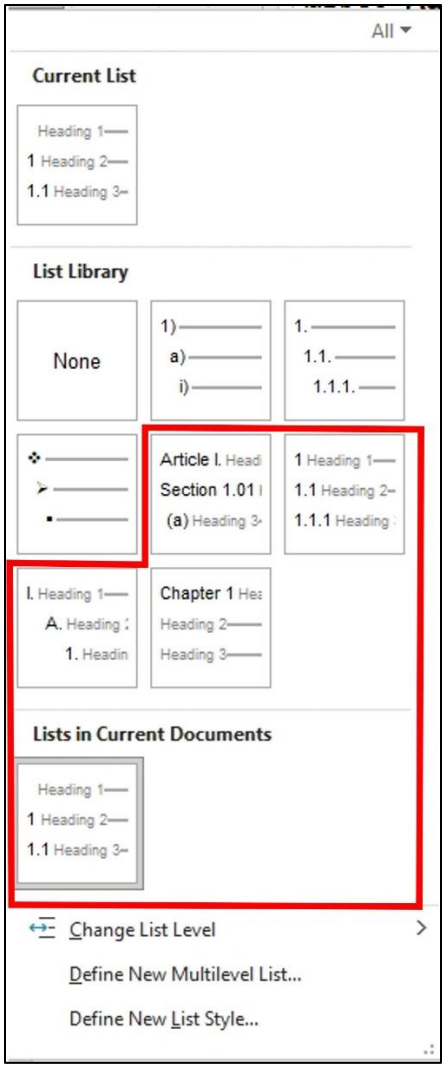
Note that if you are using a thesis template, the templates are set to auto-generate chapter numbers.

To automatically insert numbered chapters and sections:

1. Ensure the title of the thesis listed on the document title page is assigned the Heading 1 style.
2. Ensure your chapter titles are assigned the Heading 2 style.
3. Select Home in the menu bar and within the Paragraph section of the toolbar, select the **Multilevel List** icon.



4. Select a design from list library that uses heading styles.

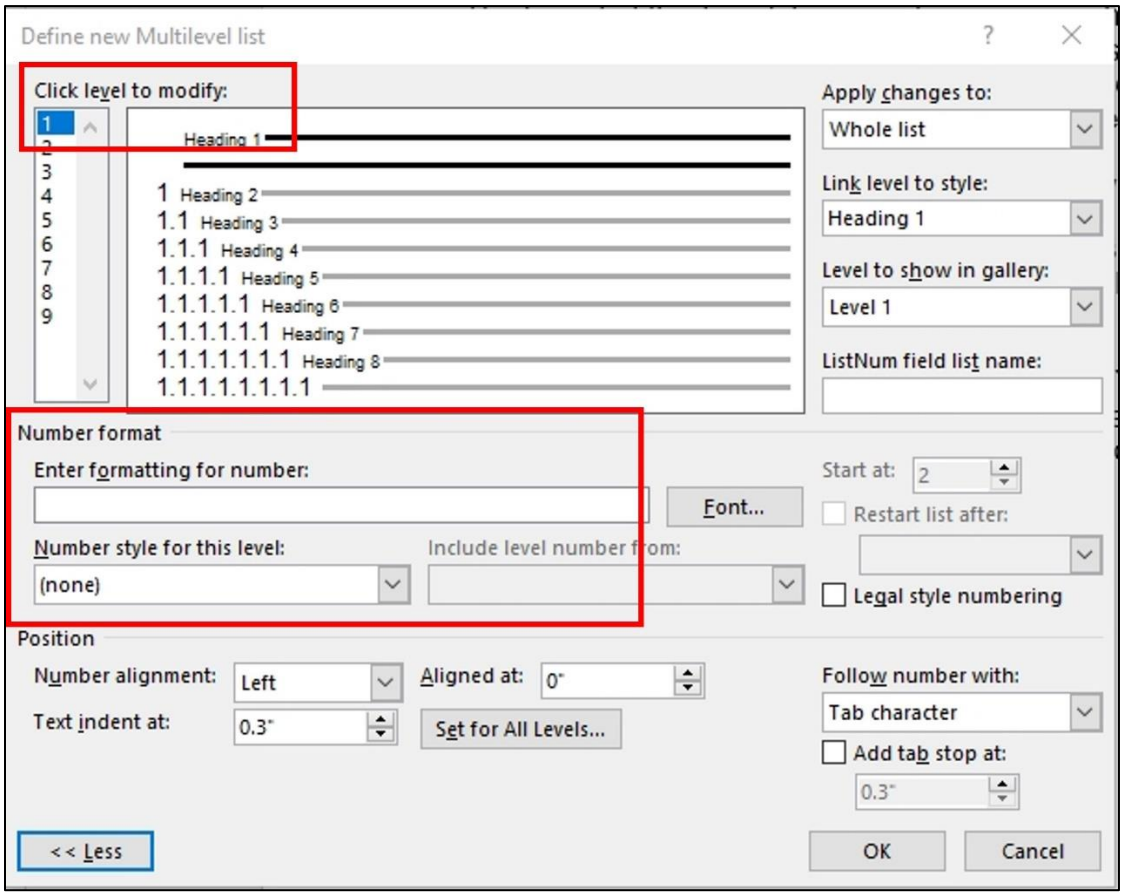


5. The heading styles should now be updated and include numbering.
6. All text assigned a heading style will be automatically numbered.

2.2.1 Adjust heading level numbering

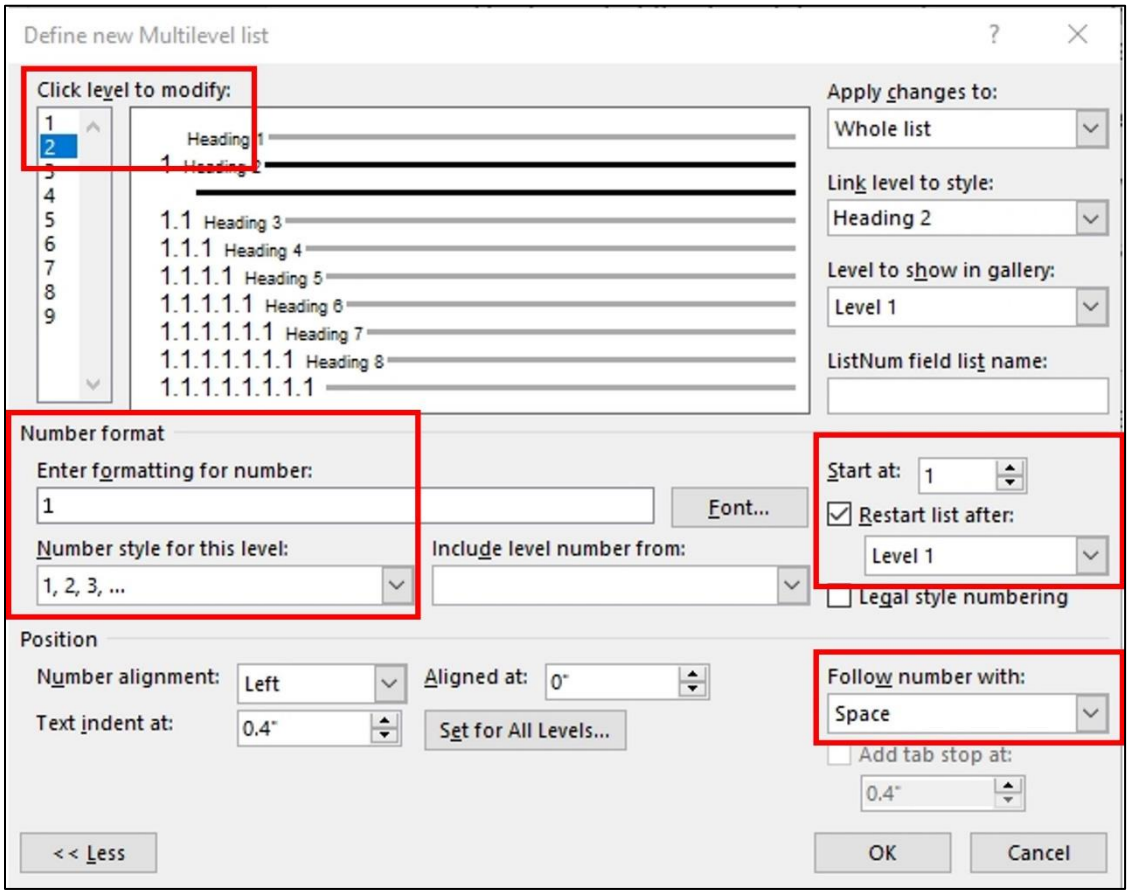
As Heading 1 in the thesis templates has been assigned to the thesis title on the title page, it should not be numbered. You can adjust the multi-level list properties so that only Headings 2 – 6 will be numbered.

1. Click on the number at the start of the first section title that is assigned a Heading level 1 (e.g., your thesis title on the title page to highlight all heading titles that are assigned Heading Level 1 in grey.
2. Right click and select **Adjust List Indents**.
3. In the Define New Multilevel List window, click on the **More>>** button.
4. To remove the numbering scheme from Heading Level 1:
    c. In the **Click level to modify** section, click on **1**.
    d. In the Number Format section:
        i. For the **Enter formatting for number** field, remove the pre-filled numbering so that the field is blank.
        ii. Ensure **Number style for this leve**l is set to (none).

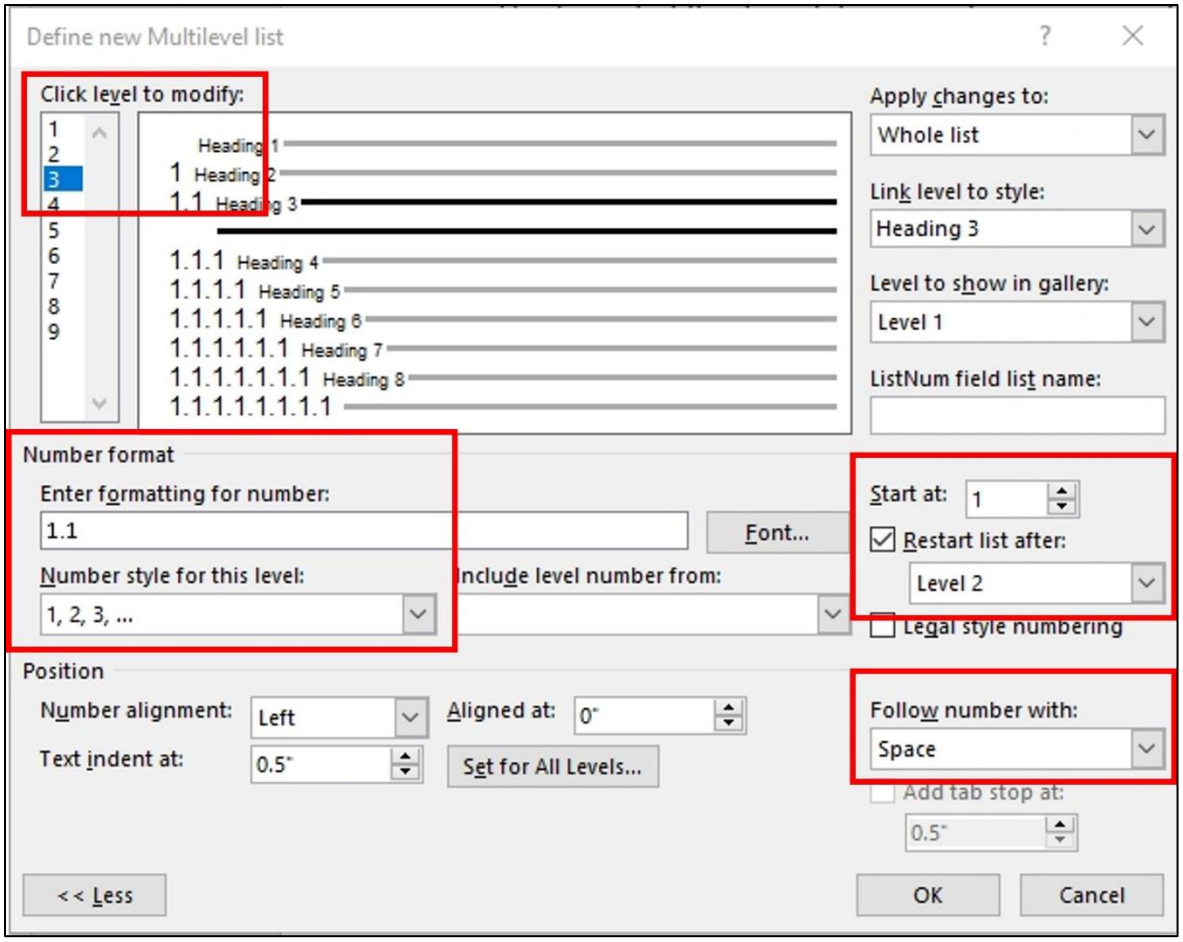


5. To reset the numbering scheme to start at Heading Level 2:

a. In the **Click level to modify** section, click on **2**.
b. In the Number Format section:
    i. For the **Enter formatting for number** field, reset the numbering to '**1**'.
    ii. Ensure **Number style for this level** is set to '**1,2,3…**'.
    iii. **Uncheck** the box beside the **Restart the list** field.
c. In the Position section:
    i. For the **Follow number** with field, select **Space** from the drop-down menu.



6. To reset the numbering scheme to start at Heading Level 3:
    a. In the **Click level to modify** section, click on **3**.
    b. In the Number Format section:
        i. For the **Enter formatting for number** field, reset the numbering to '**1.1**'.
        ii. Ensure **Number style for this level** is set to '**1,2,3…**'.
        iii. **Check** the box beside the **Restart the list** field and make sure **Level 2** is selected in the option list.
    c. In the Position section:
        i. For the **Follow number** with field, select **Space** from the drop-down menu.



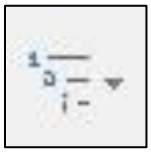
7. To reset the numbering scheme to start at Heading Level 4:
    a. In the **Click level to modify** section, click on **4**.
    b. In the Number Format section:
        i. For the **Enter formatting for number** field, reset the numbering to '**1.1.1**'.
        ii. Ensure **Number style** of this thesis is set to '**1,2,3…**'.
        iii. Check the box beside the **Restart the list** field and make sure **Level 3** is selected in the option list.
    c. In the Position section:
        i. For the **Follow number** with field, select **Space** from the drop-down menu.
8. Repeat Step 7 for Headings 5 and 6, adjusting the numbering and restart list field as required.
9. Once you have finished setting all the levels, click **OK**.

2.2.2 Remove automated numbering of chapters and sections

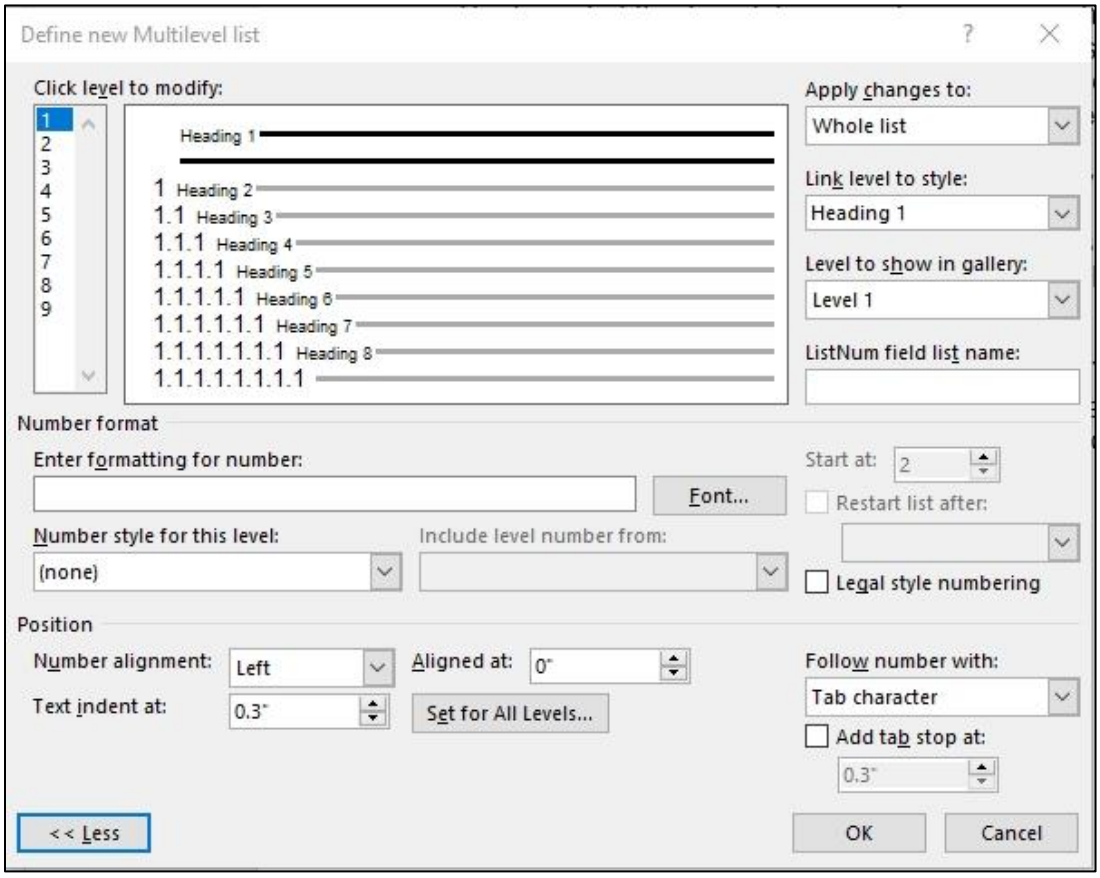
To remove automated numbering of chapters and sections:

1. Place your cursor in front of the first Heading 1 of the document.

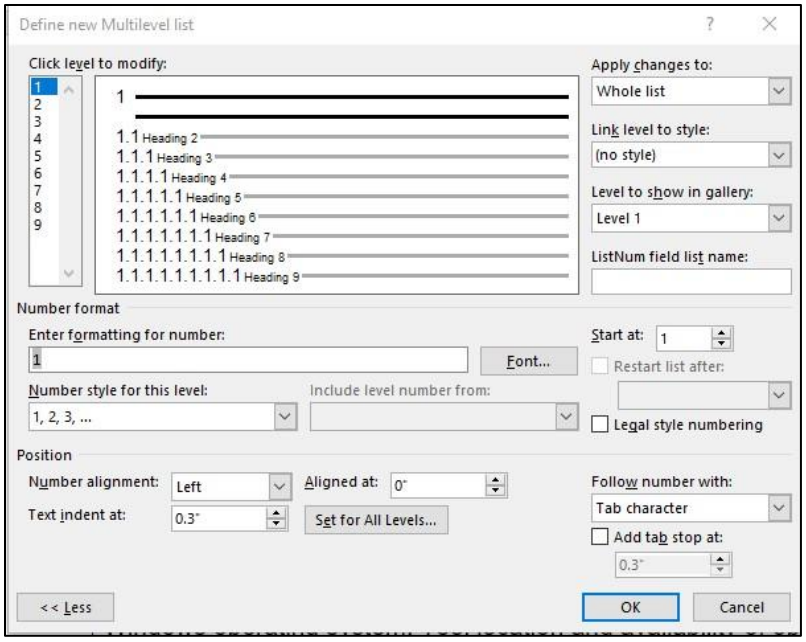
2. Under Home in the main menu bar and in the Paragraph section of the toolbar, select the **Multilevel List** icon.



3. Select **Define New Multilevel List** from the drop-down menu. In the Define new Multilevel list window, you may have to click on the **More >>** button at the bottom left of the window to expand the window to view all available settings.



4. In the Define New Multilevel List window, set **Link level to style** to **(no style)** for each numbering level.

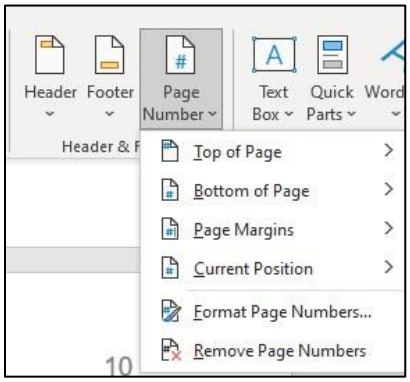


5. Click **OK.**

2.3 Adding page numbers

To automatically add page numbering into the header or footer of the document:

1. Select **Insert** in the main menu bar.
2. Within the Header & Footer section of the toolbar, select **Page Number**.
3. Using the drop-down menu options, you can choose to place the page numbers at either the Top of Page or Bottom of Page.



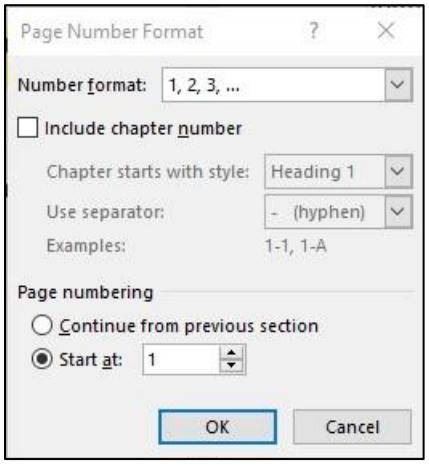
4. You can set the format of the page number under **Format Page Numbers**.
5. In the **Page Number Format** window, select a **Number Format** from the drop-down menu (e.g., numbers, Roman numerals, letters).
6. Click **OK**.

2.3.1 Change page numbering after a section break

There may be cases where you wish to have different numbering system or format displayed in different sections of your document such as displaying Roman Numerals on a sub-set of pages and regular numbering on the remainder of your document. Note that for each section of the document that requires a different numbering format, you will need to ensure that it is part of its own section by adding a section break into the document (see Section 2.4 Creating breaks in the document).

To change how page numbering is displayed within different sections of your document:

1. Insert a Section Break (see Section 2.4.2 Section breaks) at the start of the sub-set of pages you wish to change the numbering format for.
2. Double click in the area around a page number in the new section to open the Header & Footer tool bar.
3. Select **Page Number** and then **Format Page Number**.
4. Choose the **Number format**.
5. If you want the page numbering to continue from a previous section, select **Continue from previous section**.
6. If you want to start a new numbering, select **Start at:** and indicate the number you would like the numbering to start with.
7. Repeat steps 1 to 6 for each sub-section of pages that you need to adjust the numbering format for.



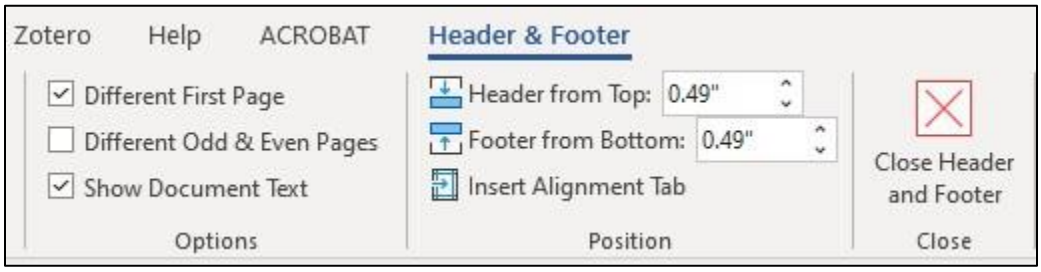
2.3.2 Suppressing a page number

The method described below will only suppress the page number on the first page of a Section within your document. If you need to suppress the page number on consecutive pages, or in different locations throughout your document, each page will need to be in its own Section. For instructions on creating a Section Break before and after a page you wish to suppress the page number for see Section 2.4.2 Section Breaks.

To suppress a page number:

1. Open the header/footer for the page by double clicking in the area around the page number you want to suppress.

2. In the Header & Footer toolbar within the **Options** section, click on the radio box for **Different First Page**.



3. Either select the **Close the Header and Footer** button in the menu bar or double-click anywhere outside the header/footer. The page number on the first page of the section is no longer displayed. Note that the page will still count as a page in the Table of Contents.

2.3.2.1 Suppressing page numbers for a multi-page Abstract

The ETD formatting instructions require that the page number be suppressed for the Title Page and Abstract of your thesis. The ETD template is pre-set to suppress the page number for the Title Page and for a one-page Abstract. If your Abstract is more than one page, you will need to add a **section break before each additional page** of your Abstract and suppress the page numbers for the additional page(s).

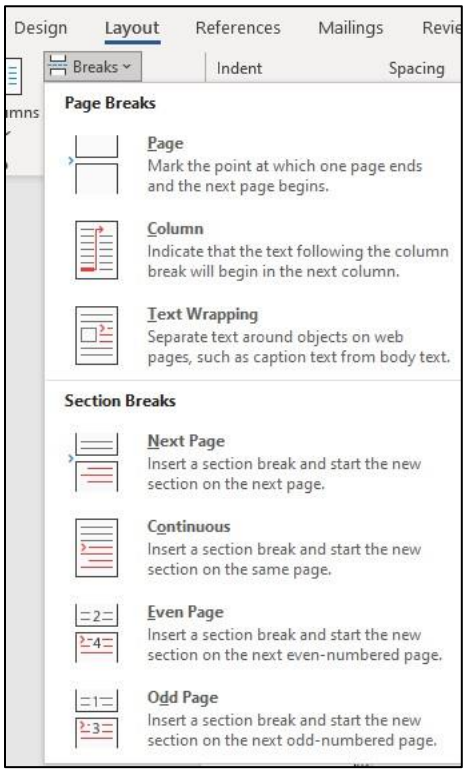
2.4 Creating breaks in the document

Breaks can be used to start a chapter or section on a new page or to create a ‘section break’ in the document.

2.4.1 Page Breaks

Use page breaks to start a new page (instead of hitting the enter button several times). As noted in the general format instructions for theses, subheadings at the bottom of the page must have at least two full lines of text below it, otherwise the subheading should be moved to the next page. In such cases, a page break could be used to move the section to a new page.

1. Place your cursor where you would like to insert a page break (e.g., at the beginning of a section title).
2. Select **Layout** in the main menu bar.
3. Select **Breaks** from the **Page Setup** section of the toolbar.
4. Select **Page** from the drop-down menu.



2.4.2 Section breaks

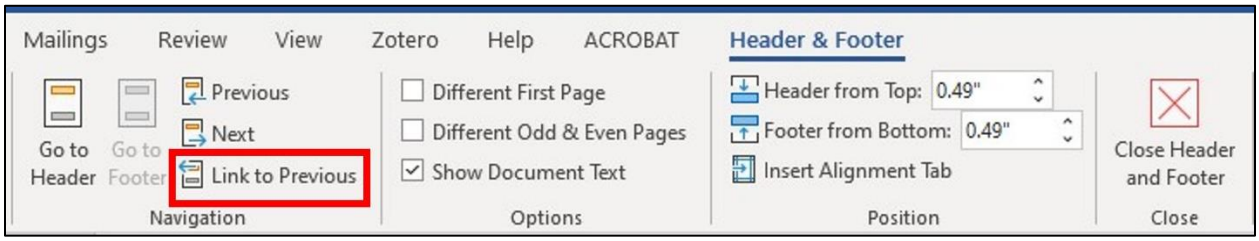
Section breaks can be used to change the layout or format of a document. For example, section breaks can be used to divide the document into different parts when you need to assign different page numbering formats or suppress the page number for a particular page.

1. Place your cursor where you would like to insert a break (e.g., at the beginning of a section title).
2. Select **Layout** from the main menu bar.
3. Select **Breaks** from the **Page Setup** section of the toolbar.
4. Select **Next Page** from the drop-down menu. Note that a Next Page break will insert the section break at the beginning of the next page of the document. If you want a section to start a new section on the same page as the previous section, then insert a Continuous section break.

2.4.3 Removing the link between sections

By default a new section is linked to the previous section. If you need a different header or footer between sections (e.g. placement of page numbers different between sections) you will need to remove this link.

1. Open the header/footer for a page within a section by double clicking in the area within the upper or lower margin of the page.
2. Click within header (or footer).
3. In the Header & Footer menu, within the Navigation group, select **Link to previous**. This will remove the link between the current section and the previous section for the header (or footer).



4. Change the formatting of the header (or footer) as required. When complete, close the header/footer

2.4.4 Other types of breaks

There are other types of Page and Section breaks available. To add a break to your document:

1. Select **Layout** from the main menu bar.
2. Select **Breaks** in the **Page Setup** section of the toolbar.
3. Select from different types of **Page Breaks** or **Section Breaks** options.

2.5 Automatically generate a Table of Contents

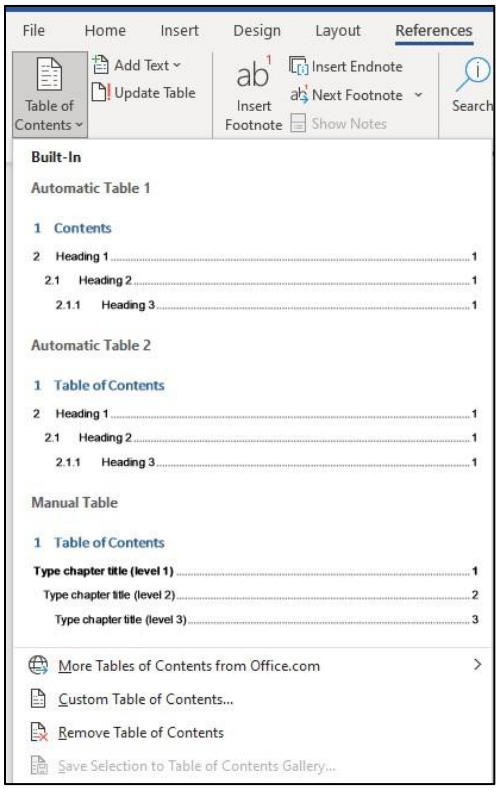
Only text that has been assigned a Heading Style (e.g. Heading 1 to 9) will be included in the Table of Contents (TOC). After creating the TOC, if text is showing up that should not be included (e.g. body text), make sure this text is assigned the Normal style.

2.5.1 Create a Table of Contents

To automatically create a Table of Contents for the document:

1. Click on the page in your document where you wish to insert your Table of Contents.
2. Select **References** in the main menu bar.
3. In the Table of Contents section of the toolbar, select the **Table of Contents** icon.

4. Chose a style from the drop-down menu or create a custom design.



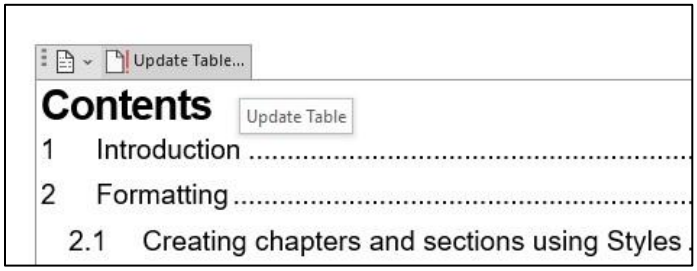
5. A Table of Contents will be added into the document.

2.5.2 Update a generated Table of Contents

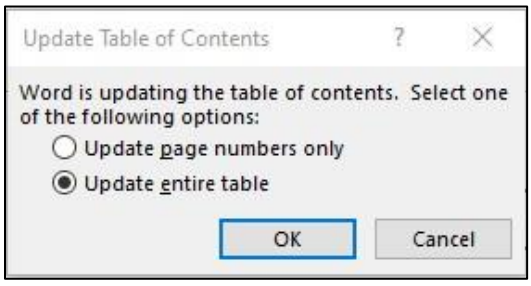
If you add new sections into your document, or the placement of section headings changes as you work on your document, the Table of Contents will need to be updated.

To update the Table of Contents:

1. Click on the Table of Contents.
2. In the top left corner, select **Update Table**.



3. Select either **Update page numbers only** or **Update entire table**. It is recommended that you select Update entire table as this will update both the section headings as well as the page numbers in the contents.



4. Click **OK**.

2.6 Changing the orientation of a page

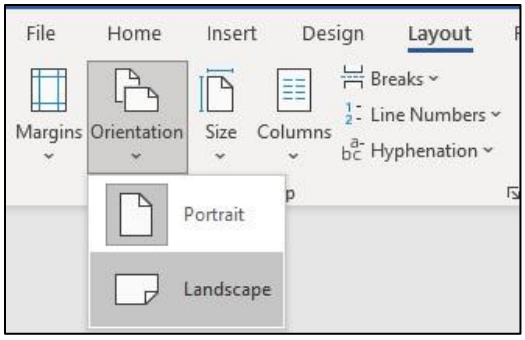
To change the orientation of a page, you first need to insert a section break both before and after the page.

To insert section breaks:

1. Place your cursor at the beginning of the section you want to break.
2. Select **Layout** in the main menu bar.
3. Select **Breaks** from the Page Setup section in the toolbar.
4. Select **Next Page**.
5. Repeat steps after placing cursor at the end of the section you wish to break.

To change the page orientation:

1. Click on the page you want to orient.
2. Select the **Layout** in the main menu bar.
3. In the Page Setup section of the toolbar, select **Orientation**.
4. Select **Landscape** from the drop-down menu.



Note: If section breaks were not used, all pages that are included in that section of the document will be re-oriented.

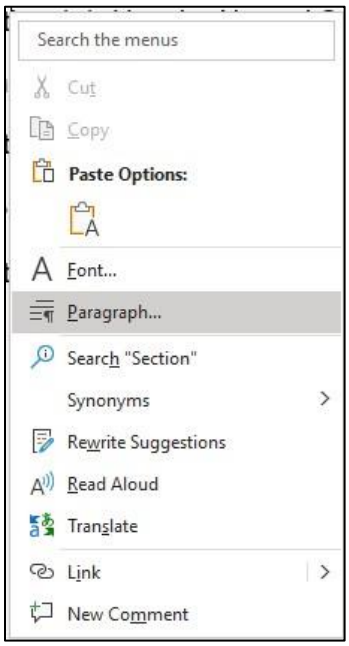
2.7 Adding spacing to the document

Instead of relying on tabs, spaces, and carriage returns (i.e., hitting the enter button) to add formatting into a document, use the **Paragraph** menu to apply formatting to selected text or to modify a Style's settings to apply formatting to all text assigned to that style.

2.7.1 Apply formatting/spacing to selected text

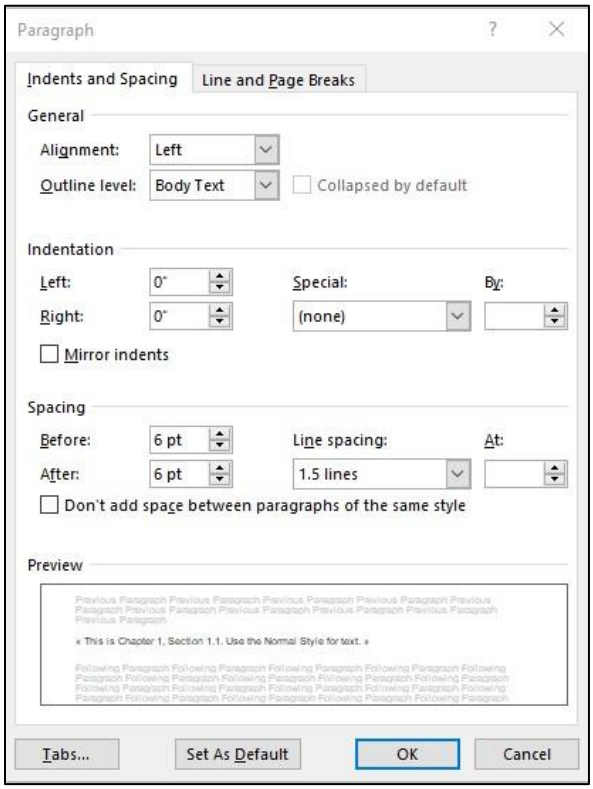
To adjust margins, indentation and spacing for text:

1. Highlight the text.
2. Right click and select **Paragraph** from the context (short-cut) drop-down menu.



- In the Paragraph window, use the options to set formatting and spacing
    - Under General

        - Set the alignment of the text (e.g., align left, centred, align right, justify).
        - Outline level
            - If the text highlighted has been assigned a heading style, the outline level will match the heading level (e.g., Level 1 to 9 matches Headings 1 to 9).
            - All other text will have an Outline Level of Body Text.
    - Under Indentation
        - Set the **left/right** indentation.
        - Use the **Special** option
            - To apply indentation to the **First line** only.
            - To create **Hanging** lines (where all lines after the first are indented by a set amount).
    - Under Spacing
        - Use **Before** and **After** to set the amount of space between individual paragraphs – 6pt works well.
        - Use **Line spacing** to set the number of spaces between lines within a paragraph – 1 to 1.5 lines works well.



2.7.2 Apply formatting/spacing to a Style

To adjust margins, indentation, and spacing for a style:

1. Right click on the style in the Styles menu.

2. Select **Modify** from the drop-down menu.
3. In the **Modify Style** window, click on the **Format** button at the bottom of the window and select **Paragraph**.
4. Apply settings as required.
5. Click **OK**.

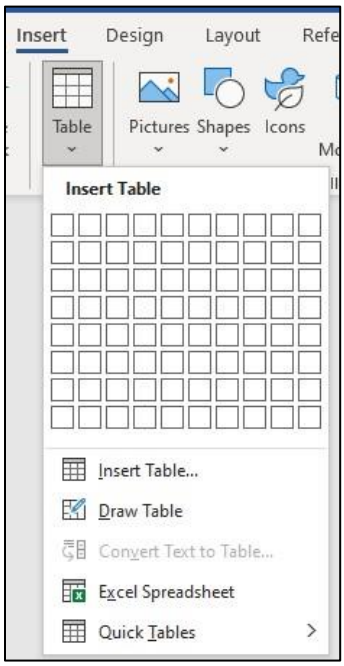
2.8 Creating and captioning tables

Tables can be created and captioned in Word. For Accessibility purposes, it is a best practice to create tables directly in Word as opposed to inserting an image or screen-capture of your table.

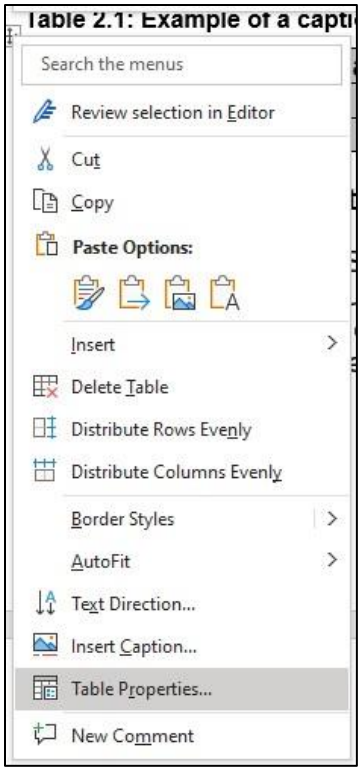
2.8.1 Creating a table

To insert a table:

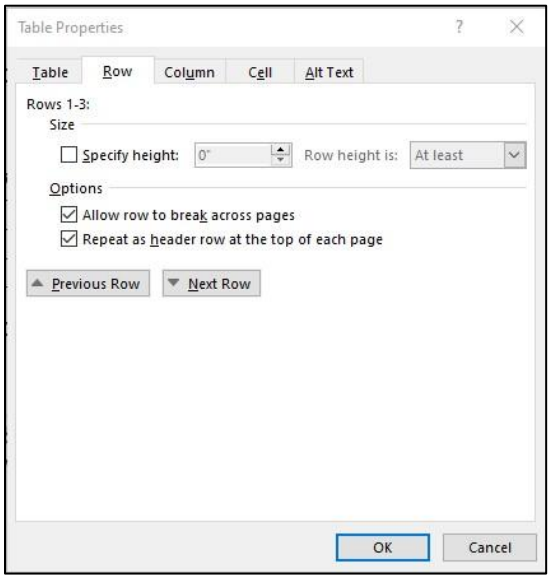
1. Under Insert in the main menu, select Table.
2. A drop-down menu will open allowing you to select the size and design of the table.



3. Once the table has been created, highlight the table, and right click.
4. Select **Table Properties** from the drop-down menu. Note that there are several options available in this drop-down menu for adjusting the design of the table (e.g., Text direction, Row/Column distribution, Border Styles, Captioning).



5. In the Table Properties window, select the **Row** tab. Under options, make sure both '**Allow rows to break across pages**' and '**Repeat as header row at the top of each page**' are selected.



6. Define your header row and first column, by clicking on the table and then select the **Table Design** tab in the main menu.
7. In the Table Style Options section:
    a) Select Header Row to set column headers.
    b) Select First Column to set the row headers.

Note: It is a best practice avoid using merged or split cells in a table. Additionally, you avoid using blank cells in the table, whenever possible. Consider coding blank cells with a textual (e.g., Not applicable, N/A) or numerical value (-9999).

Using merged, split or blank cells in a table decreases the accessibility of your document as it is hard for Adaptive Technology (e.g., screen readers) to understand, navigate and read merged, split, and blank cells.

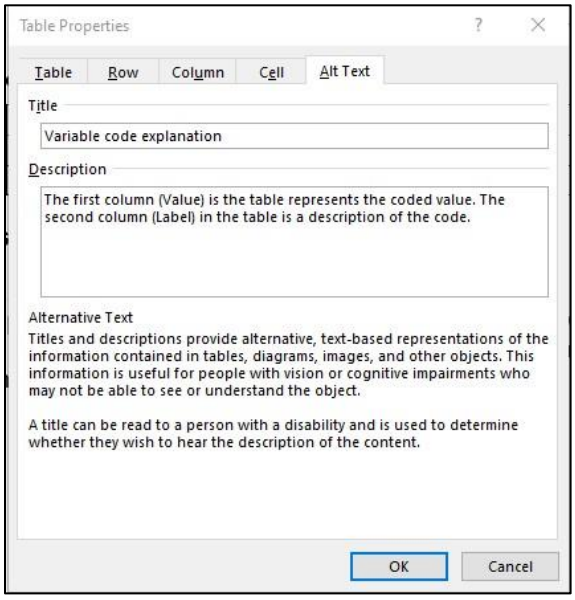
2.8.2 Adding alternative text to a table

To improve the accessibility of your thesis, you can add alternative text to your tables.

Alternative text is a word or phrase that describes the nature or content of the table. Alternative text is read by screen readers allowing the content and function of the table to be accessible to those with visual or cognitive disabilities. Refer to WebAIM's Alternative Text guide for more information about creating alternative text.

Note that the alternative text should not repeat captioning text (e.g., table caption) nor any text about the table that is included in the body text of your thesis.

1. In the Table Properties window, select the **Alt Text** tab. Add a name for the table in the **Title** text box and a brief explanation of the table in the **Description** text box.

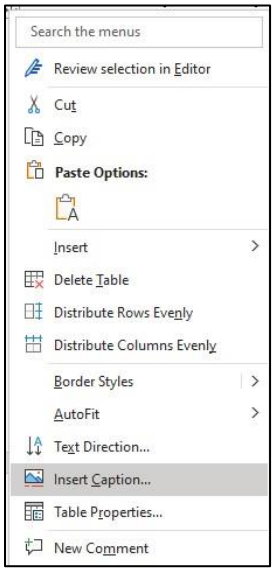


2. Click **OK**.

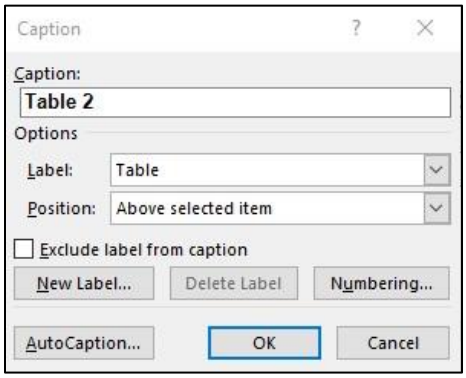
2.8.3 Captioning a table

To add table captions:

1. Select the table.
2. Right-click and select **Insert Caption** from the context (short-cut) menu.



3. In the Caption window, under **Caption**, enter a description of the table. The table numbers will automatically be numbered consecutively.
4. Set the **Label** to **Table**.
5. You can select the position of the caption, generally a table caption is '**Above selected item**'.

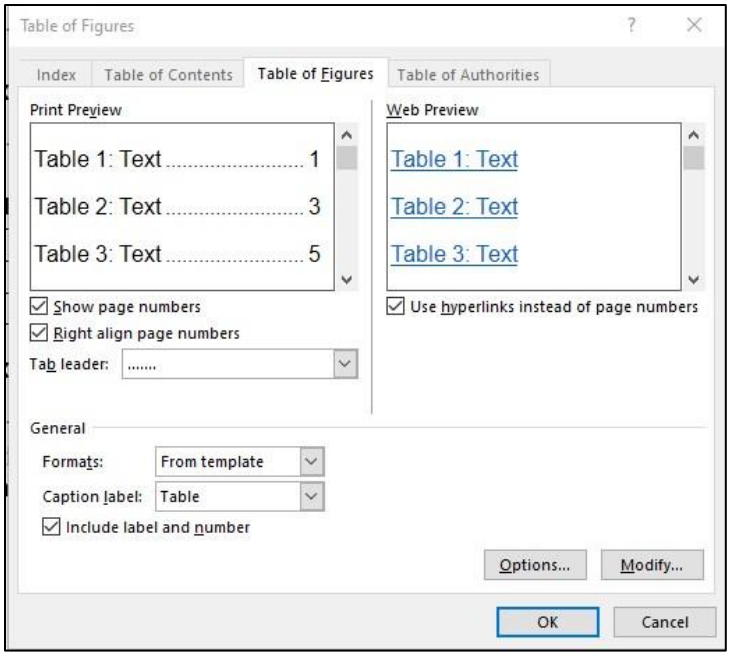


6. Click **OK**.

2.8.4 Create a listing of tables

A listing of tables can be created if you added captions to the tables.

1. Select **References** in the menu bar.
2. In the Captions section of the toolbar, select **Insert Tables of Figures**.
3. In the Table of Figures window, set the **Caption label** to **Table**.



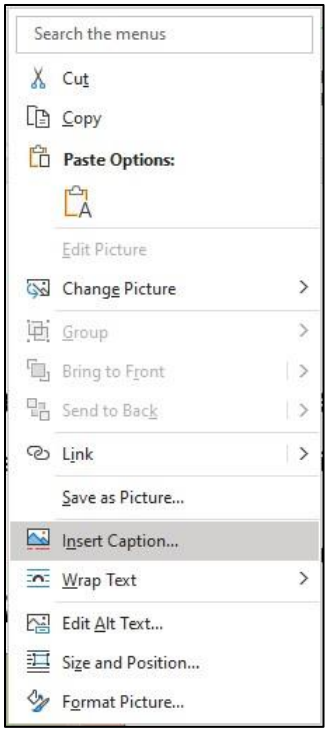
4. Click **OK**.

2.9 Creating captions and lists for figures

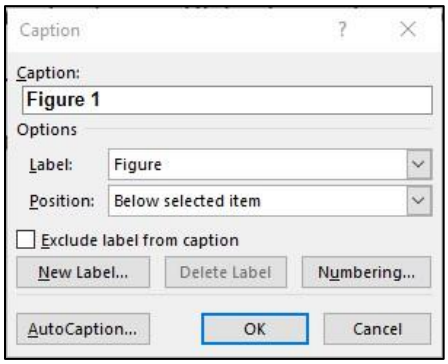
2.9.1 Creating captions for figures

To create figure captions.

1. Select the figure.
2. Right-click and select **Insert Caption** from the context (short-cut) menu.



3. In the Caption window, under **Caption**, enter a description of the figure. The figure numbers will automatically be numbered consecutively
4. Set the **Label** to **Figure**.
5. You can select the position of the caption, generally a figure caption is '**Below selected item**'.

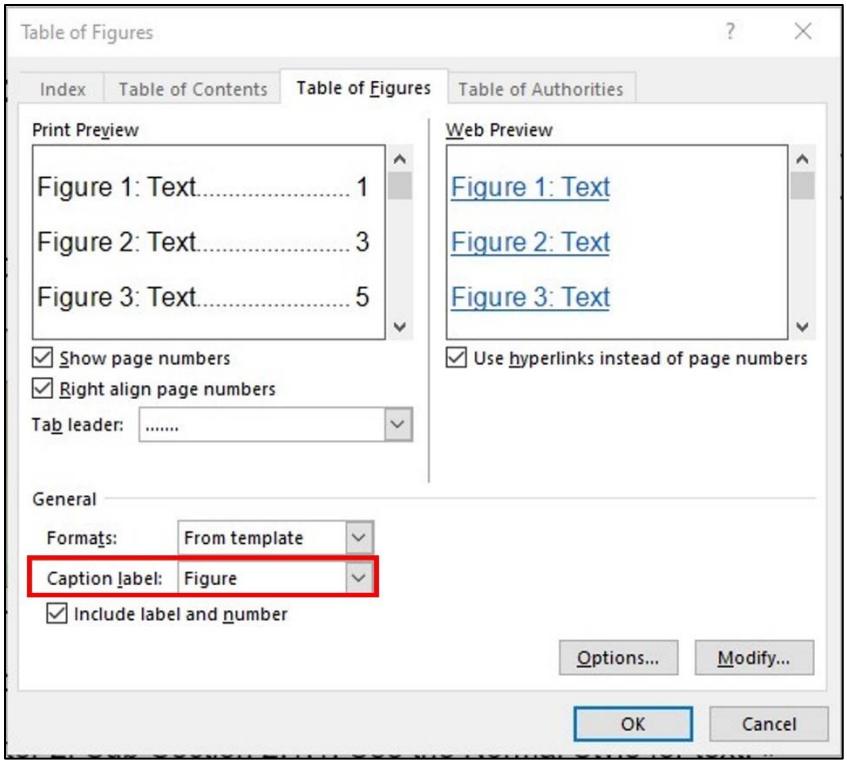


6. Click **OK**.

2.9.2 Create a listing of figures

A listing of tables can be created if you added captions to the tables.

1. Select **References** in the menu bar.
2. In the Captions section of the toolbar, select **Insert Tables of Figures**.
3. In the Table of Figures window, set the **Caption label** to **Figure**.



4. Click **OK**.

2.9.3 Adding alternative text to figures/images

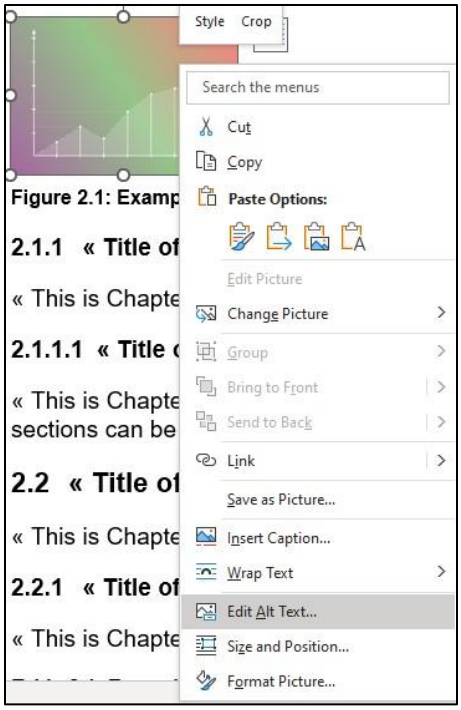
To improve the Accessibility of your thesis, you should add alternative text to your figures/images.

Alternative text is a word or phrase that describes the nature or content of the figure. Alternative text is read by screen readers allowing the content and function of the figures to be accessible to those with visual or cognitive disabilities. Refer to WebAIM's Alternative Text guide for more information about creating alternative text.

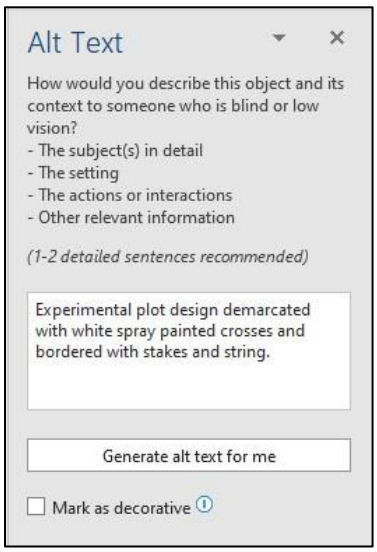
Note that the alternative text should not repeat captioning text (e.g., figure caption) nor any text about the figure that is included in the body text of your thesis.

To add alternative text to a figure:

1. Select the figure.
2. Right click and select **Edit Alt Text** from the context (short-cut) menu.



3. In the **Alt Text** panel, enter a brief description of the figure/image.



2.9.4 Writing alternate text for figures/images

When creating alternate text, keep in mind that Alt Text should:

- Be added to figures/images that provide content or function to the document.
- Be concise.
- Not duplicate any descriptive information about the figure/image that is in the figure/image caption or the body text.
- Not include phrases such as “image of” or “graphic of” as a screen reader will automatically indicate that the object is an image.

- Be empty for decorative images (e.g., a border/page break graphic, images already sufficiently described in the body text, images used for ambiance or visual interest, etc.). If the image is purely decorative, in the Alt Text window, click on the radio button for ‘Mark as decorative’.
- Include any text included in the image/figure. If the image/figure contains meaningful text, this text should be included, verbatim, in the alt text.

2.9.5 Figures with overlaid graphics

If someone is using Adaptive Technology to view your document, screen readers will register images with graphics overlaid as several separate items. The context of a graphic, such as a box or arrow, used to highlight a portion of the image will not be apparent to the screen reader.

It is a best practice to use image editing software (e.g., Photoshop) to add graphics to an image, to group all the items together and save as a single item.

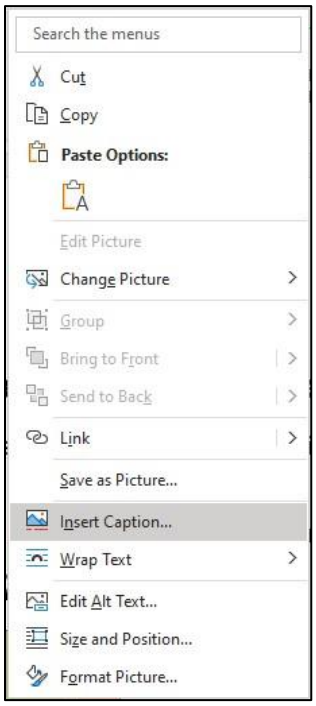
2.10 Creating captions and lists for other object types

Other objects may include plates or illustrations.

2.10.1 Creating captions for other objects

To create captions for other objects:

1. Select the object.
2. Right click and select **Insert Caption** from the context (short cut) menu.



3. In the Caption window, select the **New Label** button.

4. In the New Label window, enter the label title (e.g., Plate) and click **OK**.

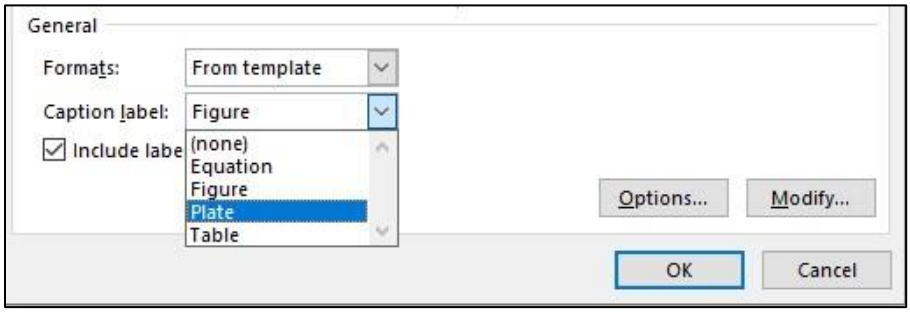
5. In the main Caption window, the new label will now be an option in the Label menu.

6. Under **Caption**, enter a description of the object. The object numbers will automatically be numbered consecutively.
7. Select the position of the label.
8. Click **OK**.

2.10.2 Create a listing of objects

A listing of tables can be created if you added captions to the tables.

1. Select **References** in the main menu.
2. In the Captions section of the toolbar, select **Insert Tables of Figures**.
3. In the Table of Figures window, set **Caption Label** to the object label (e.g., Plate).



4. Click **OK**.

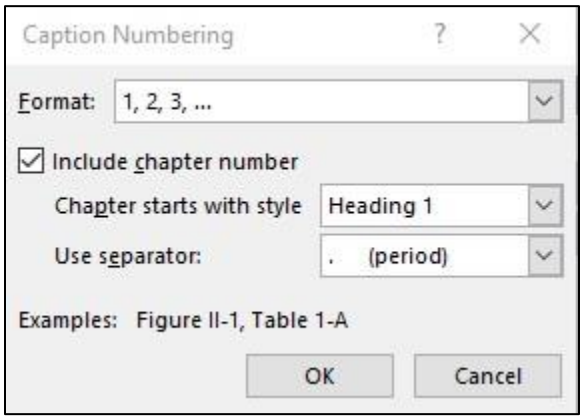
2.11 Including chapter numbers in captions

To include chapter numbers in your captions, one of your heading styles must be set to automatically generate chapter numbers. See Section 2.15 for instructions on how to auto-generate chapter numbers.

Note: In the ETD Template, Headings 1 is set to auto-generate chapter numbers.

To add chapter numbers to captions:

1. Select an object in your document (e.g., table, figure, etc.) and right click.
2. Select **Insert caption** from the context (short cut) menu.
3. In the Captions window, select **Numbering**.
4. Check off the radio box for **Include chapter number**.
5. Under **Chapters starts with style**, select the **Heading 1**.
6. Under **Use separator**, select a delimiter (e.g., hyphen, period, colon).

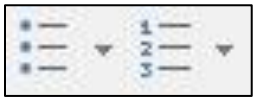


7. Click **OK**.

2.12 Creating formatted lists

To create a formatted list use:

1. The **List Paragraph** style, or the **Bullets** or **Numbering** tools accessed through the Paragraph section in the Home toolbar.

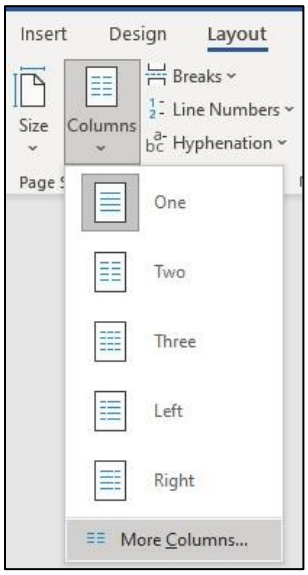


2. To create nested lists, use the **Increase Indent** or **Decrease Indent** tools.

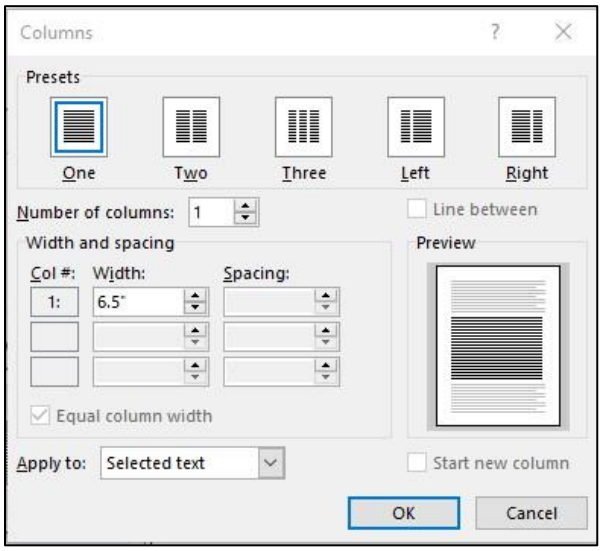
2.13 Creating columns out of lists

To break a list of text into multiple columns, use the Column tool.

1. Highlight the text you want to break into columns.
2. Select **Layout** in the main menu bar.
3. Select **Columns** in the Page Setup section of the toolbar.
4. Select the number of columns you wish to create or the **More Columns** option.



5. If you select the **More Columns** option you can set the number of columns, the width and the spacing of the columns.



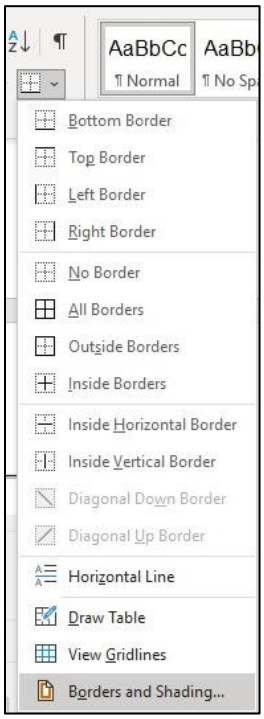
6. Click **OK**.

2.14 Adding borders around text

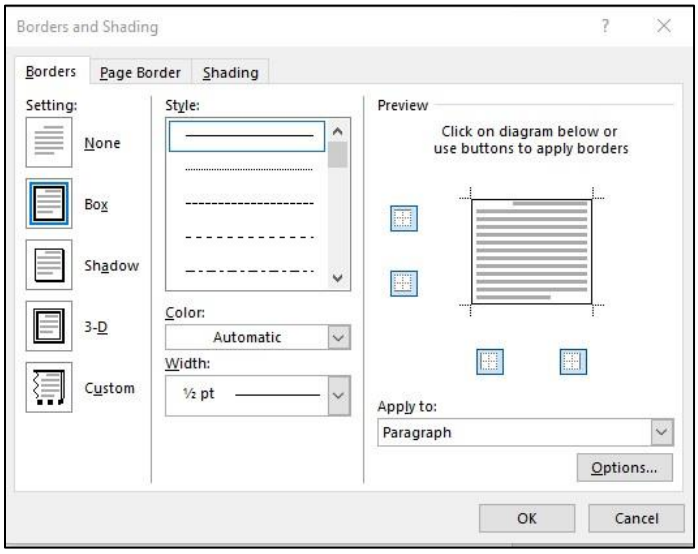
If you want to emphasize a portion of text, instead of using text boxes or inserting lines to show a break in the text, place a border around the text.

To add a border around a group of text:

1. Highlight the text.
2. Select Home in the main menu bar and in the Paragraph section of the toolbar, click on the down arrow beside the **Borders** icon.
3. Select **Borders and Shading** from the drop-down menu.



4. In the Boarders and Shading window, select the **Borders** tab.
5. Under **Setting**, select **Box**.
6. Set the style, colour, and width of the border.
7. Under **Apply to**, set as **Paragraph**.



8. Click **Ok**.

You will end up with text inside of a box.

2.15 Adding hyperlinks

Users who navigate using a screen reader must be able to unambiguously understand the purpose of the link and skip links they are not interested in. To achieve this:

- Descriptive: When writing link text, make sure it can be understood without additional context. Do not use ‘click here’, ‘read more’, ‘link to’, etc.
- Concise: Use keyword(s) as linked text rather than longer sentences. For text that is meant to be printed, hyperlink the text and add a full URL.
    - E.g., ‘Additional information about thesis formatting requirements is available on the Office of Graduate and Postdoctoral Studies’ Preparation of your thesis website.’.
- Unique: Avoid similarly named hyperlinks if they link to different places.
- Visually distinct: Use the default blue underlined style for hyperlinks. If you change it, make sure the links are still high contrast and underlined. Do not use underline for non-hyperlinked text.

Example of a good link insertion

In the following example, the link itself fully describes what the link is directing to without needing the surrounding text for context.

> …“the University of Guelph’s Accessibility Resources – Document Accessibility webpage provides a variety of guides for making accessible documents.”

2.16 Font

- New Times Roman or Arial are the preferred font types
- Use a font size of 12 pt. for normal text
- Larger font sizes can be used in headings
- Non-standard typefaces, such as script, should not be used except for commonly accepted symbols

2.16.1 Bold

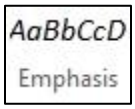
To bold text:

1. Highlight the text you want to bold and apply the **Strong** style to the selected text

2.16.2 Italics

To add italics:

1. Highlight the text you want to italicize and apply the **Emphasis** style to the selected text.



2. There is also a **Subtle Emphasis** and **Intense Emphasis** style.

2.17 Show hidden code

It is sometimes useful to see hidden codes that mark formatting such as paragraphs, tabs, page breaks and section breaks within the document.

1. Select Home in the main menu bar, select the **Show/Hide ¶** icon from the Paragraph section of the toolbar.

2. To hide the codes, click on the **Show/Hide ¶** icon again.

2.18 Clear formatting

To clear formatting from selected text:

1. Highlight a portion of text and click the **Clear All Formatting** icon located within the Font section of the Home toolbar.

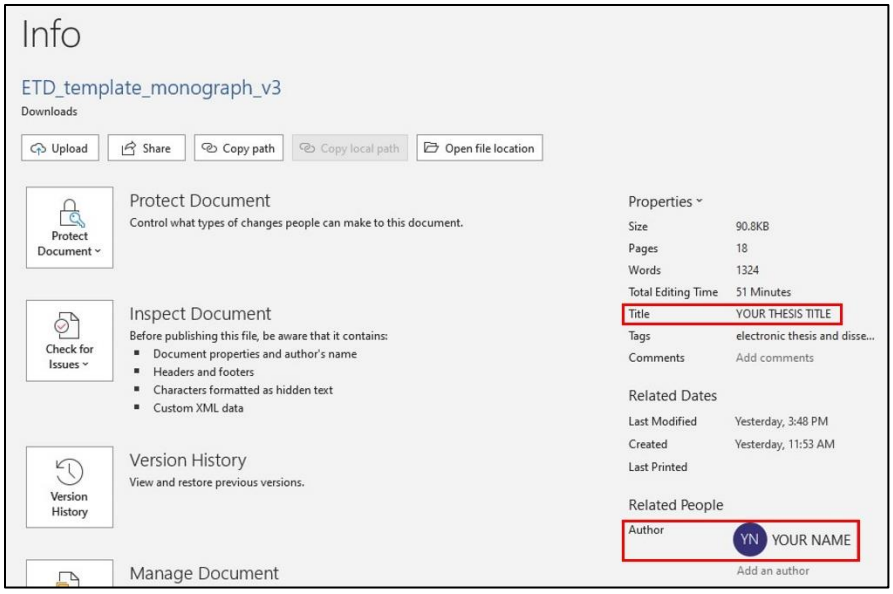
3 Updating document properties

Adding a title and author into your document's file properties will aid individuals using assistive technologies to quickly identify the file and understand the file contents.

Note: If you have used OGPS' ETD Template, be sure to update the document properties so that the file properties title and author fields reflect that of your thesis.

To update the file properties:

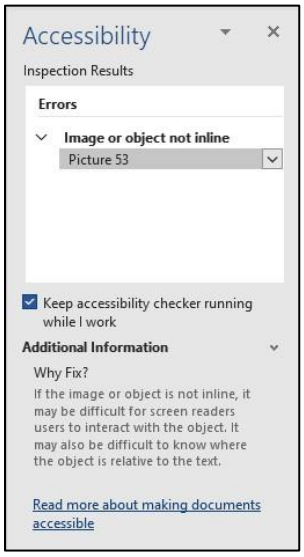
1. Select **File** in the main menu bar.
2. Select **Info** in the left-hand panel.
3. Under the **Properties** section on the right-hand side of the Info window:
    a. Update the **Title** field, removing 'UG ETD Template' and adding the title of your thesis.
    b. Update the **Author** field with your full name.



4 Accessibility checks

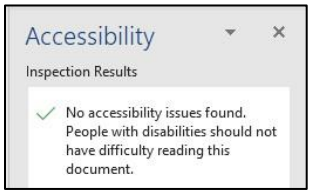
MS Office 365 products running on a Windows operating systems have built in accessibility checkers that can be used to review the accessibility of your document.

1. Select **File** in the main menu bar.
2. Select **Info** in the left-hand panel.
3. Click on the **Check for Issues** icon and select **Check Accessibility** from the drop-down menu.
4. The **Accessibility** panel will open, and accessibility errors, warnings, and suggestions will be listed in the inspection results. You can click on each item to learn more about the issue and potential methods for fixing it.



5. You can keep the accessibility checker running as you work to flag and fix issues as you go by clicking on the radio box for '**Keep accessibility checker running while I work**' in the Accessibility panel.

Note: The built-in accessibility checker reviews common accessibility issues as defined in the Web Content Accessibility Guidelines (WCAG) 2.1 accessibility standard for accessible content. The checker may not flag all accessibility issues within the document. Even if the checker finds no accessibility issues with the document, there may still be some issues that would only be flagged upon a direct comparison of the document against the WCAG 2.1 recommendations. Nevertheless, running the accessibility checker and fixing as many issues as possible is a best practice and is strongly recommended.



5 Saving your document as a PDF

Before submitting your thesis to the Atrium, to maintain the document formatting and tagging and to support a more accessible document, it should be saved as a tagged PDF.

5.1 Adobe Acrobat Pro

If you are using Adobe Acrobat Pro:

1. Select **File** from the main menu bar.
2. In the drop-down menu click on **Create** and then select **PDF from File**.
3. In the **Open** window, navigate to, and select the desired document to convert.
4. Click on **Open** to begin the file conversion.

5.2 Adobe Acrobat add-in in MS Word

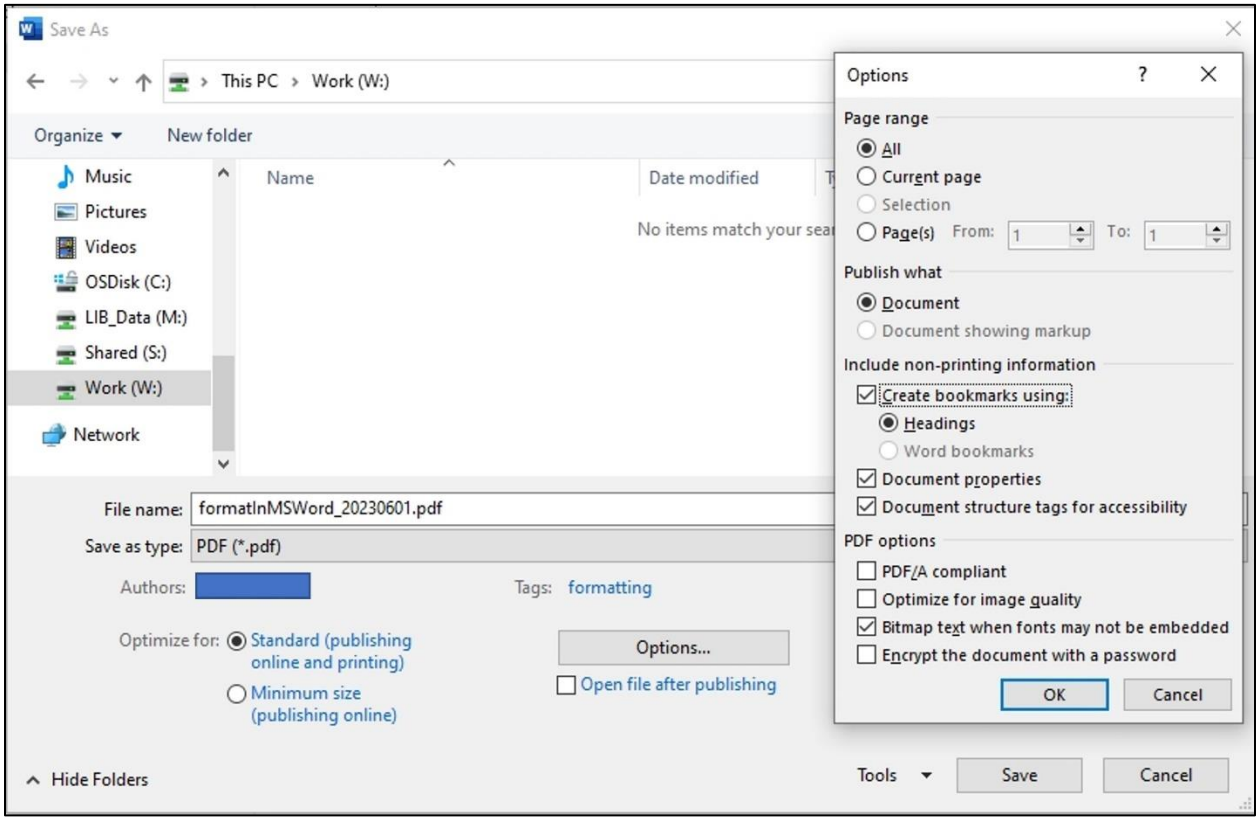
If your version of MS Word has an Adobe Acrobat add-in application:

1. In the main menu click on the **Acrobat** tab.
2. Click on **Create PDF**.
3. In the **Save Adobe PDF File as** window click on **Options**.
4. In the Adobe PDFMaker window make sure that the radio button for '**Enable Accessibility and Reflow with tagged Adobe PDF**' is checked.

5.3 MS Word for Windows

If you are using MS Office Word on a Windows operating system, to create a tagged PDF:

1. Select **File** in the main menu bar.
2. Click on **Save As** in the left-hand panel.
3. In the Save As window, choose where you want the file to be saved and enter a file name into the File Name text box.
4. Change the '**Save as type**' to **PDF**.
5. Click on the **Options** button.
6. In the Options window,
    a. Under the 'Include non-printing information',
        i. Click the radio button for '**Create bookmarks using**' and '**Headings**'.
        ii. Click the radio button for '**Document structure tags for Accessibility'**.



7. Click **OK** in the Options window.
8. Click **Save** in the Save As window.

5.4 MS Word for Mac

If you are using MS Office 365 for Mac (or Word 2016 for Mac), to create a tagged PDF:

1. Select **File** in the main menu bar.
2. Select **Save As**.
3. Enter a file name into the '**Save As**' text box and choose where you want the file to be saved.

4. Change the '**File format**' to **PDF**.
5. Select '**Best for electronic distribution and accessibility (uses Microsoft online service)**'.
6. Click **Save**.

6 Resources

For further guidance, please see:

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