How to

Design Manuals for Poll Workers using Word

Tips and tricks for designing long documents in Microsoft Word

U.S. ALLIANCE FOR ELECTION EXCELLENCE

Center for Civic Design

Introduction

How to Design Manuals for Poll Workers using Word is the technical companion to Center for Civic Design's Poll Worker Manual template and Best Practice Guide. It is an expansive list of tips and tricks for Microsoft Word that will help even the most basic Microsoft user feel confident when putting together materials.

We chose to publish this how to guide because we recognize that a majority of elections offices across the country rely on Microsoft Word for their document creation. Microsoft Word is widely available, easy to use, and has a number of advanced formatting and accessibility features that—if used right—can take your document from good to great.

If you're using a program other than Word, or want to learn more about the best practices behind building poll worker manuals, check out **How to: Design Manuals for Poll Workers**.

Look out for blue information boxes!

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Throughout the guide we include links to detailed instructions for some of Word's more advanced features. All of the URLs are written out in full in the appendix on Page 19.

What's in this guide?

Setting up your Word document.

Set your manual up for success before you start writing by understanding and using the range of formatting options built into your word processor.

If there's only one thing you take away from this how-to guide, it should be this: **set up—and use—styles**. If the program you're using doesn't have text formatting styles, we recommend switching programs to one that does (like Word).

Styles are a powerful tool that help you:

- Quickly make edits that apply across the entire document
- Make the pdf version more accessible for those who use screen reader assistive technology
- Set up automations that make it easier to maintain a document over time
- Speed up reading and comprehension time by reducing cognitive overload

Apart from styles, in this section we'll share other tips and tricks for using Word.

Speed up your workflow with keyboard shortcuts

Keyboard shortcuts make using Word more efficient. You use them by pressing 2 or more keys at the same time to facilitate a function. There are over 100 different shortcuts, for:

- Using the ribbon
- Navigation
- Previewing and printing
- Selecting text and graphics
- Editing text and graphics
- Working with web content
- Document views

- Working with tables
- Reviewing a document
- References, citations, and indexing
- Mail merge and fields
- Text in other languages
- Function key shortcuts

Microsoft has a complete list, but here are the ones we use most:

Function	Windows	Mac
Save a document	Ctrl + S	⌘ + S
Cut selected content to the clipboard	Ctrl + X	⌘ + X
Copy selected content to the clipboard	Ctrl + C	⌘ + C
Paste selected content to the clipboard	Ctrl + V	⌘ + V
Apply bold formatting to selected text	Ctrl + B	⌘ + B
Apply italic formatting to selected text	Ctrl + I	⌘ + I
Decrease the font size of selected text by 1 point	Ctrl + [	⌘ + Shift + <
Increase the font size of selected text by 1 point	Ctrl +]	⌘ + Shift + >
Align the text to the left	Ctrl + L	⌘ + L
Insert a page break	Ctrl + Enter	⌘ + Return
Undo the previous action	Ctrl + Z	⌘ + Z
Redo the previous action	Ctrl + Y	⌘ + Y
Search within the document	Ctrl + F	⌘ + F

Define your most commonly used styles

Create consistency and hierarchy by using styles throughout your manual.

Headers and body text are the most important style elements to build before you start writing. Other style types, including bullets and numbered steps, can be built as you find you need them.

Headers tell readers what is the most critical information on a page. Using H1, H2, and H3 styles allows you to automate your table of context.

Use header colors that match your brand identity. Be sure to use a color checker like colorsafe.co to ensure they meet contrast ratio minimums.

For normal **body text**, choose a sans serif font. We often use Noto Sans, a free font with robust language support. Create new styles for your bullet points, numbered lists, and other styles as you find you need them.

Styles and how to use them:

Style	What it's for	Formatting suggestions
Header 1 (H1)	Use for the tytle of a new section	• Font size: 22 pt • Suggested color: hex#5682B8
Header 2 (H2)	Use for the title of a subsection	• Font size: 16 pt • Suggested color: hex # 5682B8
Header 3 (H3)	Use for distinct topics or tasks within a subsection	• Font size: 12 pt bold • Color: black
Body Text	Use for writing paragraphs Build new styles based on this for bullets, numbered lists, and other formatted body text	• Font size: 12 pt • Color: black

i Read more about creating and customizing styles on Microsoft

Define your most commonly used styles

Here's what they look like on a page.

When defining your styles, you have a lot of control. You can set up a style so that it always starts on a new page, which is what we recommend for H2s. You can also define a style that affects the next paragraph, so when you hit enter, it automatically goes to a different style.

Section 1 | Heading 2

Heading 2

1-2 sentences directly under the header to explain the main goal of the page. What's the 1 thing someone needs to know?

Heading 3
Block of text.

Here's a list of steps you need to complete in order:

1. First
2. Second
3. Third

Heading 3
Here's a bunch of text.

And here's a bulleted list

- Item 1
- Item 2
- Item 3
- Item 4
- Item 5
- Item 6

Important dates to remember

Election	Early Voting	Election Day
Primary Election	5/28 to 6/10	6/14
General Election	10/22 to 11/4	11/8

Use this style to reference a document or law

8

H2 starts on a new page.

Several H3s on the page.

Steps that need to be followed in order are a single, numbered list.

"Subtitle" is larger than the main body text.

Columns are used to format long lists.

Italics used for information that can fall back visually interesting but not critical.
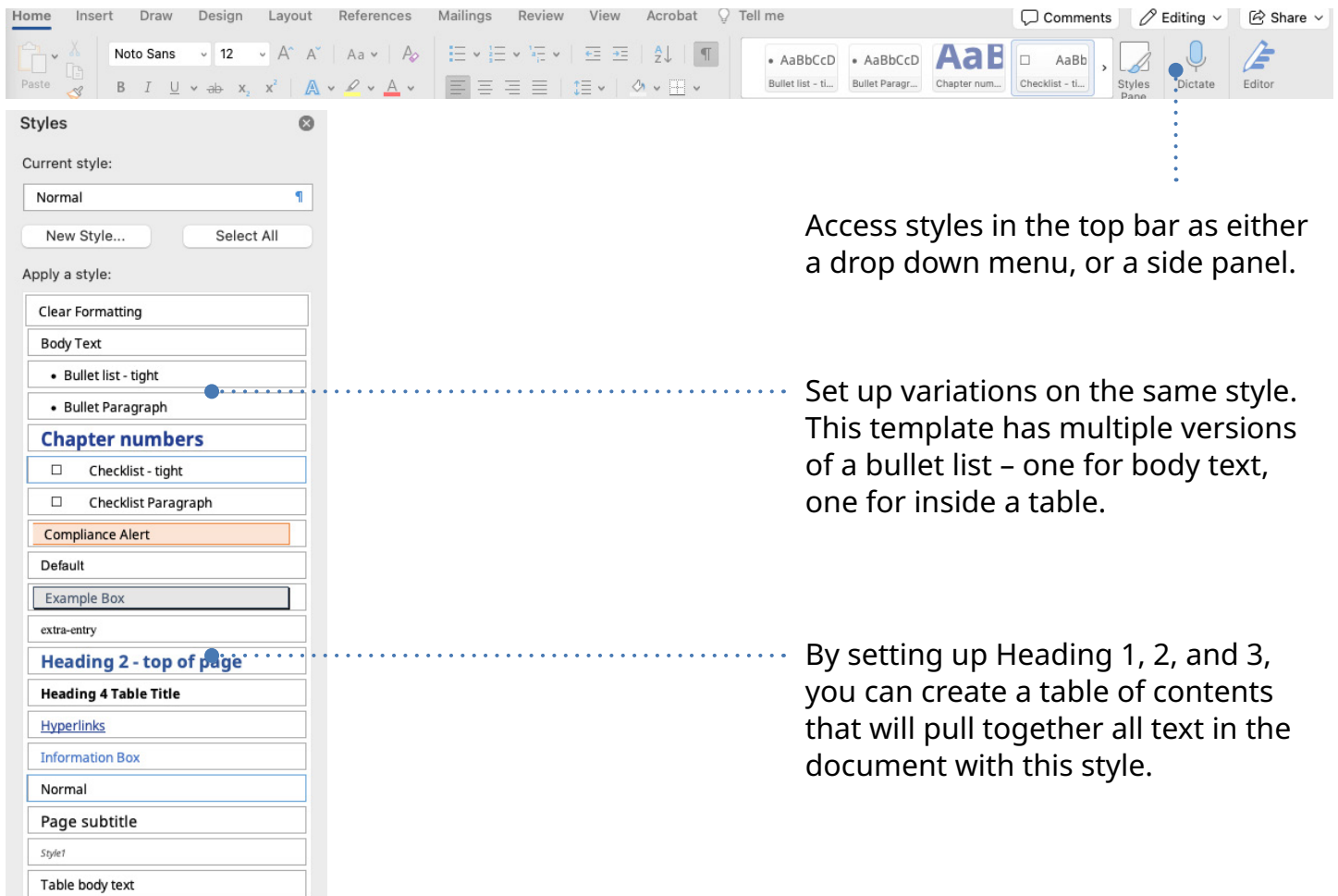
Define your most commonly used styles

Use the style panel in Word to quickly apply changes to your document.

Styles exist on the ribbon (top bar in Word) under the 'home' category. The style panel can be displayed as a drop-down menu extending from the ribbon or as a new side panel to the right of the document you are working on.

We recommend keeping the styles open in the side panel; it is a less overwhelming view to work from.

It is easy to change any text to match a style.

1. Highlight the text you want to change.
2. On the style pane, click on the style you want to use.
3. Your text now matches that style.

Access styles in the top bar as either a drop down menu, or a side panel.

Set up variations on the same style. This template has multiple versions of a bullet list – one for body text, one for inside a table.

By setting up Heading 1, 2, and 3, you can create a table of contents that will pull together all text in the document with this style.

Add page numbers to the outside bottom corner of every page

Page numbers are vital if you want poll workers to be able to navigate the manual.

Page numbers let you reference the right section in the table of contents and in accompanying job aids.

If different people worked on different sections of the manual, make sure that when you merge the sections into a single document, you add page numbers.

Click on 'Insert' on the top ribbon.

Click on 'Page Numbers'.
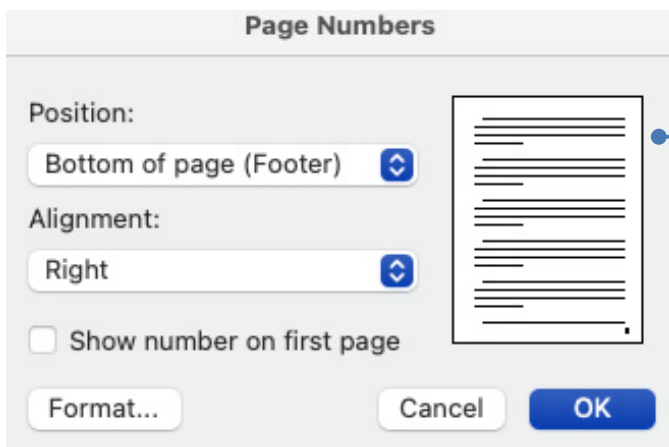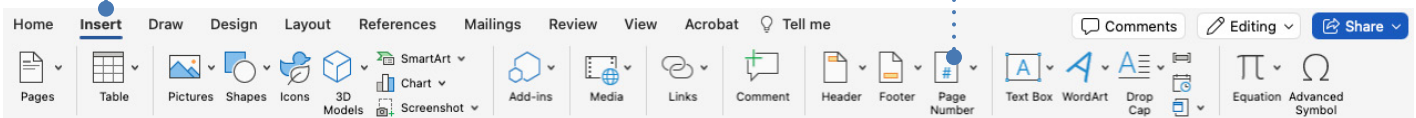
Pick the orientation and the alignment

Word will then add page numbers to the whole document.

Watch this Youtube video about continuous numbering after section breaks

Use section breaks instead of hitting enter multiple times to start a new page

This small change to how you hit enter will make it easier to make changes to your document, without messing up the formatting.

In designing your manual, it is important that multiple concepts are not on the same page. This ensures that people are not confused when reading or finding information. The simplest way to do this is to Section Break your content. Section breaking can force new content onto the next page, and allow consistant formatting of new information.

The section breaks you are most likely to use are 'Next Page' breaks, where new text is started on the following page. This is found in the Layout panel.
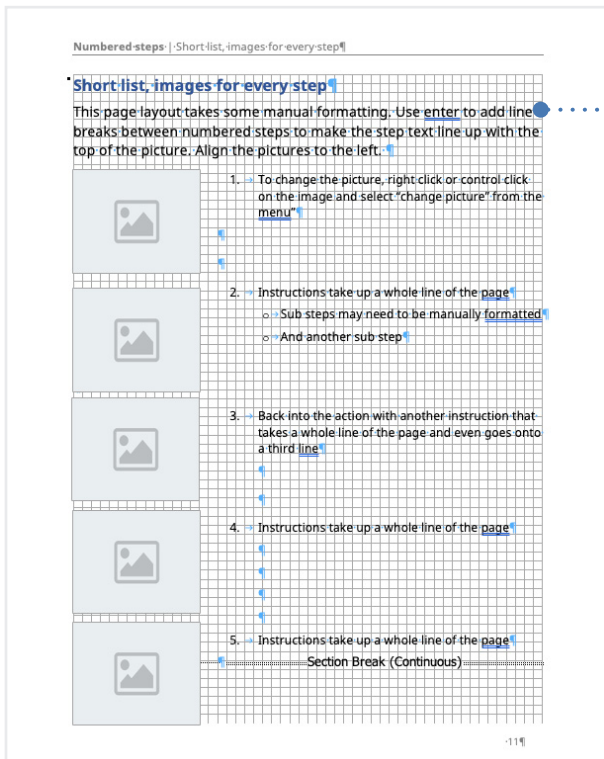
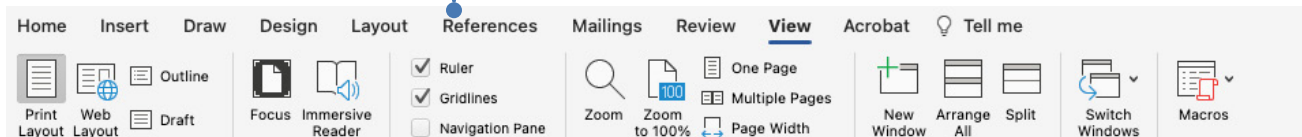Click on 'Breaks'.
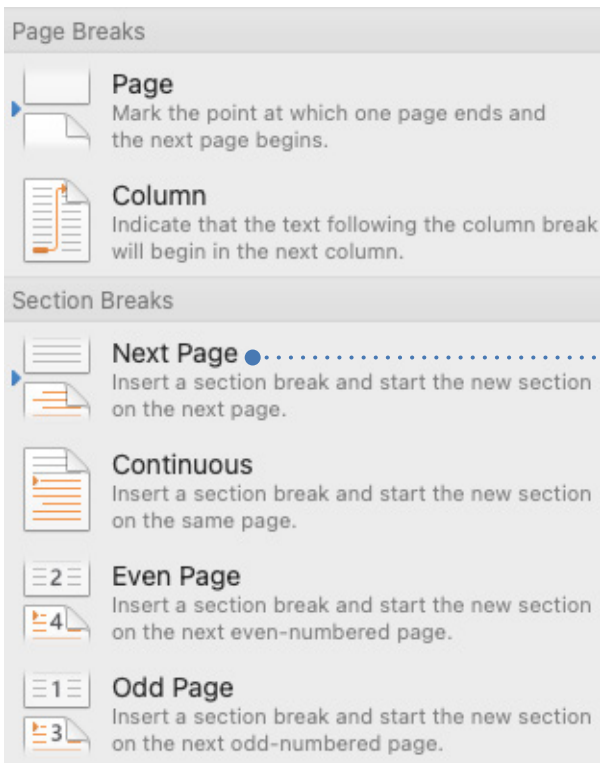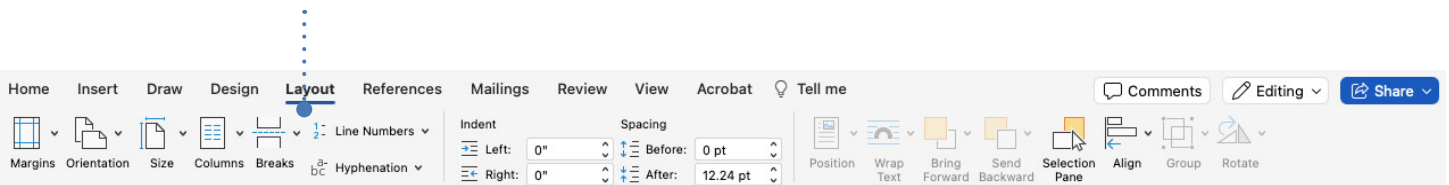
Click on 'Next Page'.

Check that objects are in neat lines using the grid

Gridlines are a handy tool in Word to help you format your document.

Use the Grid view to align, edit, and refine your document. The gridlines cannot be printed, they are just to help you edit your document.

Click on 'View' on the top ribbon.

Click on the 'Gridlines' checkbox.

The Grid appears behind the text and images used, and is bound by the margins set in your document.
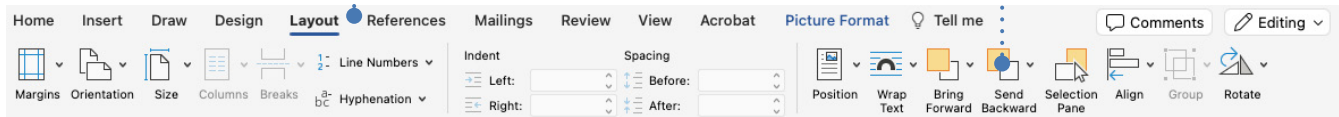
Text wrap and anchor images properly

Properly text wrapping and anchoring images ensures images and text fit together without looking cluttered.
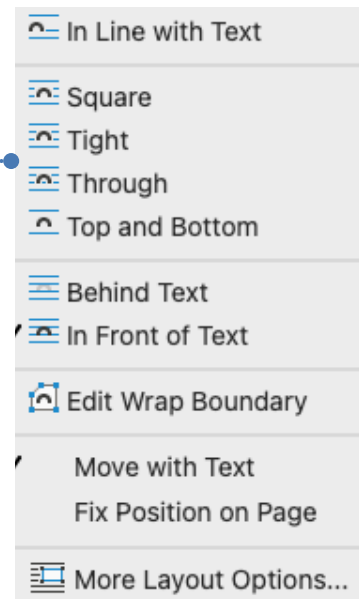
Text wrap images

Text wrapping helps separate words from images when they are next to eac hother.

Click on the 'Layout' view on the ribbon.

Click on the 'Wrap Text' option.

Choose the option you want to use.

- In Line with Text
- Square
- Tight
- Through
- Top and Bottom
- Behind Text
- In Front of Text
- Edit Wrap Boundary
- Move with Text
- Fix Position on Page
- More Layout Options...

Anchor

Anchoring is part of the text wrapping and moving graphics system in Word. Lock an anchor by selecting the picture > select the 'Layout Options' icon > select 'see more' > select 'Lock anchor'.

Resizing your images

When resizing your image, make sure not to stretch your image. Hold down 'Shift' while resizing to maintain the original height and width ratio.

i For more detailed directions about text wrapping in Word, read this article from Microsoft

Use callouts to point out important parts of an image

## Callouts are a visual element that helps emphasize something specific on an image.

We have been using them all over this document as a blue dashed line. ⋯⋯⋯⋯⋯●

They help to clearly point a reader to exactly what is being talked about.
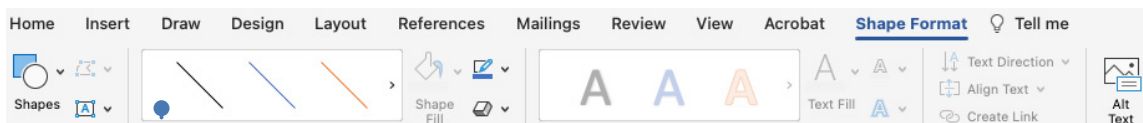
To keep your page from looking busy, make sure they are straight and at a 180, 90, or 45 degree angle only. You can make sure of this by holding 'Shift' while you create the line.

Click on 'Insert' on the top ribbon.

Click on 'Shape'.
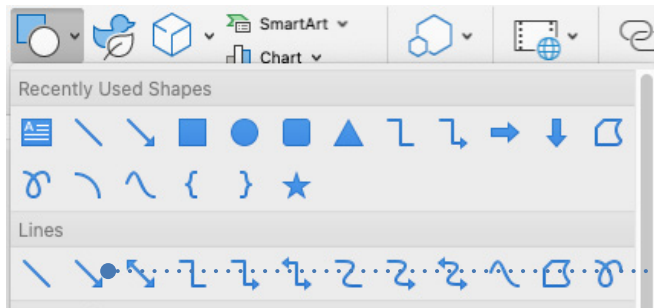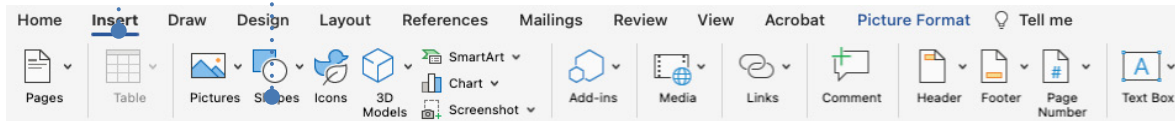
Choose the line with 1 arrow. Then draw the line on your page.

Once the line is drawn, you can change the look of it on the ribbon. Make sure that the line is brought to the front so it is shown on top of the graphic with the Arrange button on the Shape Format ribbon.
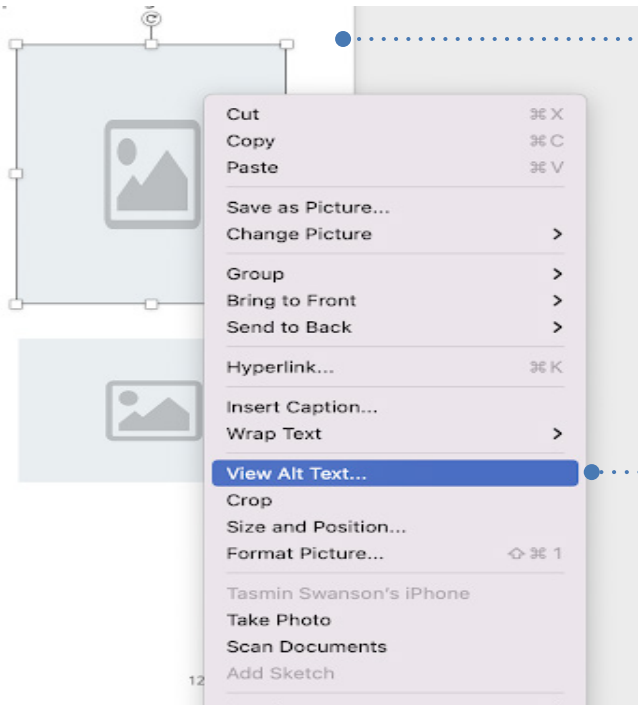
Making your manual digitally accessible

If you know that some of your poll workers will access the manual using a computer, there are a few additional steps you need to take when putting your document together.

Make images accessible using alt text

Writing alt text for images is an essential step to make sure the manual is accessible.

Pro tip: Put the alt text and caption into the draft manuscript as a comment and/or create a separate document with all of the alt text, so it's easy to proofread (or translate).

i Follow these instructions for inserting alt text in Word.

Cut   ⌘ X
Copy   ⌘ C
Paste   ⌘ V

Save as Picture...
Change Picture   >

Group   >
Bring to Front   >
Send to Back   >

Hyperlink...   ⌘ K

Insert Caption...
Wrap Text   >

View Alt Text...
Crop
Size and Position...
Format Picture...   ⇧ ⌘ 1

Tasmin Swanson's iPhone
Take Photo
Scan Documents
Add Sketch

Right click on an image to open a menu window.

Click 'View Alt Text...'.

Alt Text ⊗ | Format Picture

How would you describe this object and its context to someone who is blind or low vision?
- The subject(s) in detail
- The setting
- The actions or interactions
- Other relevant information

(1-2 detailed sentences recommended)

Placeholder image to show users where to put an image in their own manual. It has a grey background and a small picture icon in the center

Insert your alt text in the box that opens in the side panel.

When using tables, be precise with how you input data

Tables can run the risk making your document inaccessible for those using assistive technology.

Screen readers most often read content from left-to-right, top-to-bottom, but that doesn't always make sense for the info in a table. Complicated layouts like split or merged cells, or nested tables can cause confusion in the read order. It's possible to fix some of these read order problems in Adobe Acrobat, but it is time consuming, and requires some major technical knowledge.

Never use tables for non-tabular information. If you can organize information with a header, and the information makes sense, then you are good to go.

Never use tables for:

- **Organizing images and directions.** This is why we have templates with anchored images and text in columns (Like the template numbered steps with few images).

- **Writing scenarios or dos and don'ts.** We recommend writing out scripts for scenarios.

- **Formatting text, especially text that has been difficult to place on a page.** We recommend anchoring and using columns as an alternative.

If you are only producing printed manuals, and don't plan to share the manual as a digital file, you have more flexibility in using tables for layout.

When using tables, be precise with how you input data

Use tables only for information that makes sense in a table.

Correct information includes things like:

- A definition of icon meanings
- If/then information
- Text or numbers

When crafting tables make sure to:

- Always include a header for each row (screen readers use it to identify the info in the column.)
- Set first row as a header, and set it to repeat if there is a page break.
- Make lines between rows or alternate row colors (with a very light grey). This can help people track across a row accurately.
- Don't crowd the row height.
- Make a style for table contents, so there's more space above and below the paragraph.

The research behind these best practices

These guidelines are based on The Center For Civic Design's years of experience with usability testing with and observing (and being!) poll workers across the country. Here is a select list of research we drew upon while writing these documents.

Landscape scan of existing manuals from across the country
We collected manuals from around the country, and worked with The Elections Group to catalog the existing page layouts.

Security insights and issues for poll workers
https://civicdesign.org/topics/pollworkers-security/

NIST Report: Style Guide for Voting System Documentation
https://tsapps.nist.gov/publication/get_pdf.cfm?pub_id=890039

Field Guides To Ensuring Voter Intent Vol. 4 Effective Poll Worker Materials
https://civicdesign.org/fieldguides/effective-poll-worker-materials/

Field Guides To Ensuring Voter Intent Vol. 9 Creating Accessible Online Information
https://civicdesign.org/fieldguides/creating-accessible-online-information/

Presentation on writing great alt text
https://www.slideshare.net/whitneyq/writing-great-alt-text-38937551

Microsoft: Make your Word documents accessible to people with disabilities
https://support.microsoft.com/en-gb/office/make-your-word-documents-accessible-to-people-with-disabilities-d9bf3683-87ac-47ea-b91a-78dcacb3c66d

UX Magazine: Make your Presnetaions Accessible: Seven Easy Steps
https://uxpamagazine.org/make-your-presentations-accessible/

Appendix

Throughout this document, there are blue information boxes that reference resources from accross the web.

Below is a list of all the references, and the pages you can find them on.

- Read more about creating and customizing styles on Microsoft. Read more on page 6
- Watch this Youtube video about continuous numbering after section breaks. Read more on page 9
- For more detailed directions about text wrapping in Word, read this article from Microsoft. Read more on page 12
- Follow these instructions for inserting alt text in Word.. Read more on page 15

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