Using the Eurofound writing template

And some additional tips

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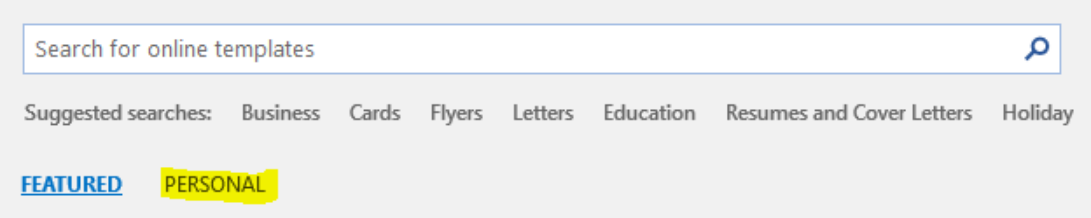
First steps

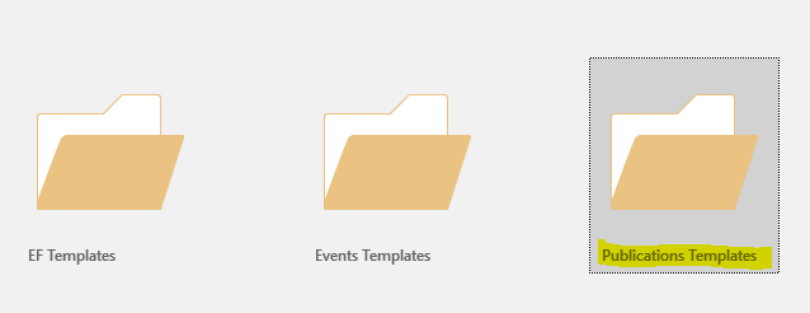
The Eurofound writing template is available to all Eurofound staff through Microsoft Word. There is no need to install it. This template should be used for writing reports, policy briefs, blogs and articles.[1]

Opening a document in the template

When you open Word, you can find the template by clicking **PERSONAL** in the right-hand panel of the start screen.



Then select the **Publications Templates** folder.



There you will find three versions of the template – for a blog or article, policy brief and research report. Choosing any of these will open a document with a skeleton structure, and a Eurofound tab in the Ribbon provides many of the commands you'll need, including document styles.

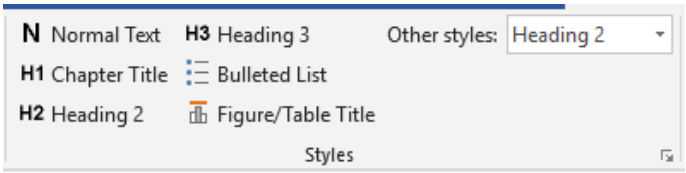
If a security warning appears below the Ribbon, click **Enable Content** to activate the commands in the Eurofound tab.

[1] The procedure for creating working papers hasn't changed; continue to use the template in TRIM at GR-17-11854.

Main functions

Applying styles to text

The **Styles** section of the Eurofound tab contains the text styles that are used most often in publications. Heading 1 is the style for chapter headings, while Heading 2 is for the main sections within a chapter. The styles for normal text, Heading 3, bulleted lists, and figure and table titles are also available directly on the Ribbon.



Heading 1 and Heading 2 can be applied with the keyboard shortcuts **Ctrl+Alt+1** and **Ctrl+Alt+2**, respectively. (Use the numbers on the main keyboard, not the number pad.)

The **Other styles** drop-down list shows the style of the text where the cursor is currently placed. It also provides styles that are less often used:

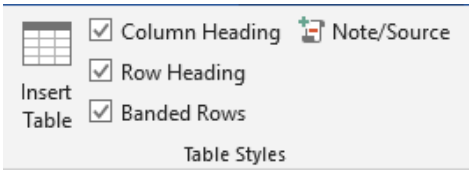
- Heading 4
- block quotes
- numbered lists
- notes and sources for figures and tables

Ignore any other styles in this list.

If you copy text from another source, styles from that source will appear in the drop-down list. Please do not use these styles.

Adding a table

The **Table Styles** section contains commands for inserting and formatting tables.



Click **Insert Table** to add a table. The standard Word dialog box appears, where you can specify the number of columns and rows. The table that is inserted is banded by default, meaning that alternating rows are shaded blue.

You can switch the banding off or on again by clicking in the table and deselecting or reselecting **Banded Rows** in the Table Styles section.

The first row is formatted for column headings and the first column is formatted for row headings by default.

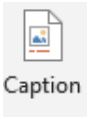
	Column heading	Column heading
Row heading		
Row heading		

If your table does not require column or row headings, click in the table and deselect the **Column Heading** or **Row Heading** checkbox. The cell contents will then be formatted like other cell contents.

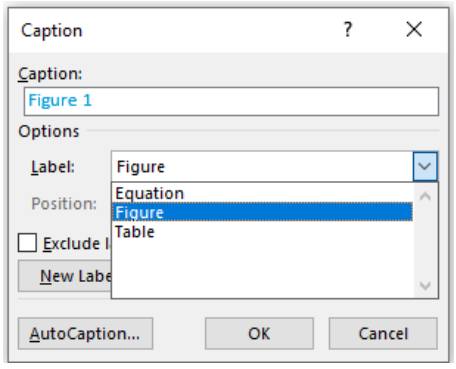
Captioning figures and tables

You should use the **Caption** button to add figure or table titles to help ensure that the number sequence in such titles is correct.

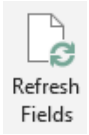
To add a figure or table title, click the **Caption** button in the References section (second from the right on the Eurofound tab).



In the dialog box, you can choose between a figure or a table from the **Label** drop-down list. Depending on which you choose, the text 'Figure *n*' or 'Table *n*' will appear in the **Caption** text box. You can complete the title by typing here.



If you add or delete a figure or table in a sequence, clicking the **Refresh Fields** button in the General section will update the numbering.



If you simply need to apply the right style to a title, click somewhere in it and choose the **Figure/Table Title** style in the Styles section. This won't, however, incorporate numbering functionality, so you should not use it for adding titles.

Adding a note or source to a figure or table

To add a note or source to a table or figure, place the cursor on the first line after it and click **Note/Source** in the Table Styles section.

This will add intro text for both in the correct style. If you don't need one of these elements, just delete it.

Note:

Source:

Adding a box

The Box Styles section contains the option for adding a text box to a document. Clicking **Insert Box** adds a box into which you can type:

The box is actually a single-cell table, formatted to act like a box. If you need to delete it, first select the box – click in it and then click on the icon that appears in the top left-hand corner; then right-click in the box and select **Delete Table**.

Box heading styles

Generally, the headings used in a box should not appear in the table of contents. For that reason, the H1 (Box Style) and H2 (Box Style) can be used instead of the regular heading styles.

Adding a figure or table to a box

You add a figure or table to boxes in the usual way. However, to add a title, you need to select the figure or table first by clicking on it. Then click on the **Caption** function and in the dialog box, select **Above selected item** from the Position drop-down list.

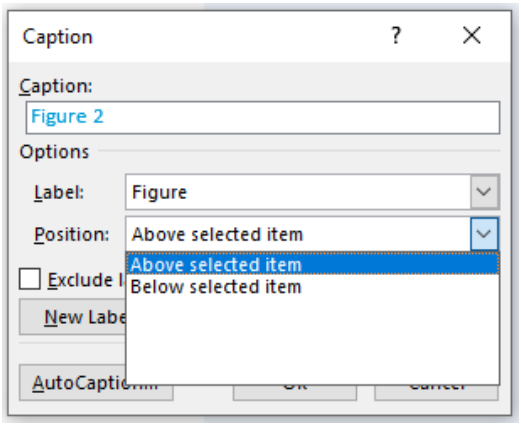
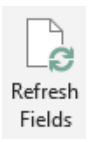


Table of contents

A table of contents is included by default in the template for research reports.

To update the table of contents, click the **Refresh Fields** button in the General section at the left of the tab.



To add a table of contents in the correct style, click the **Table of Contents** button in the References section towards the right of the Eurofound tab.

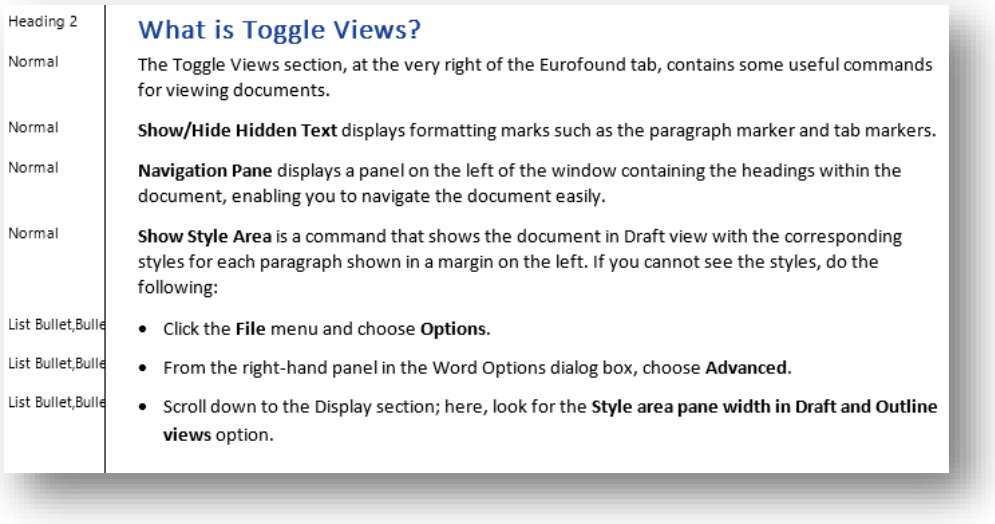
What is Toggle Views?

The Toggle Views section, at the very right of the Eurofound tab, contains some useful commands for viewing documents.

Show/Hide Hidden Text displays formatting marks such as the paragraph marker and tab markers.

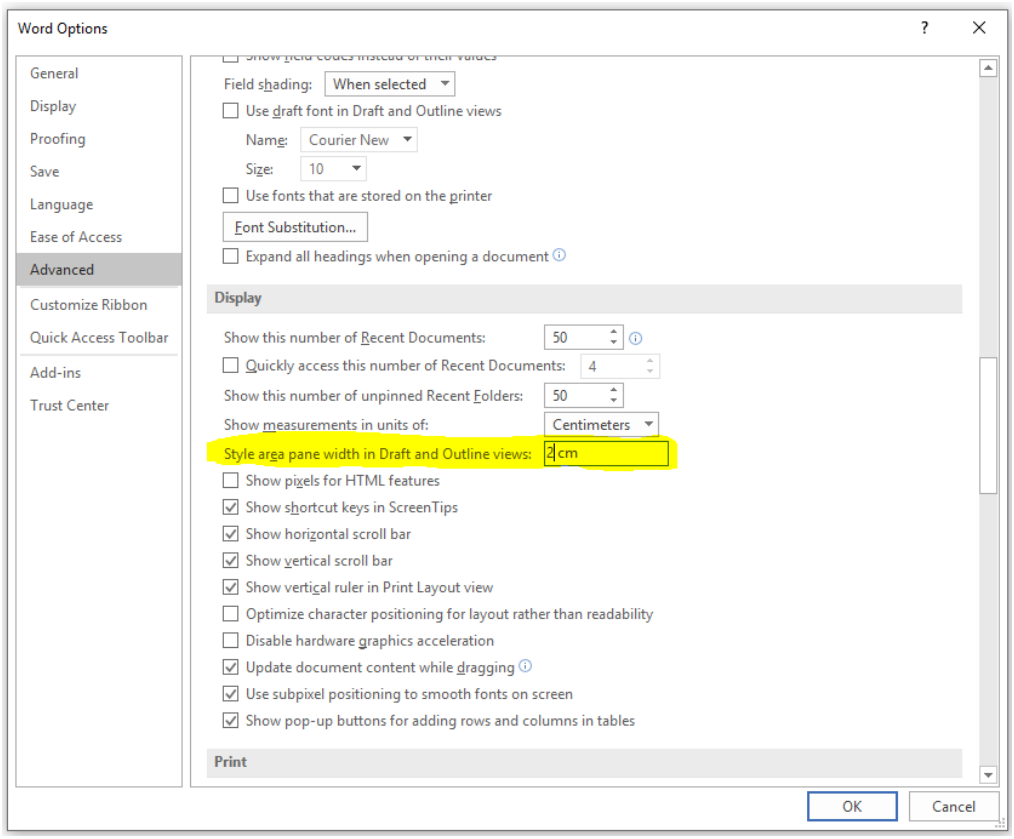
Navigation Pane displays a panel on the left of the window containing the headings within the document, enabling you to navigate the document easily.

Show Style Area is a command that shows the document in Draft view with the corresponding styles for each paragraph shown in a margin on the left:



If you cannot see the styles, do the following:

- Click the **File** menu and choose **Options**.
- From the right-hand panel in the Word Options dialog box, choose **Advanced**.
- Scroll down to the Display section; here, look for the **Style area pane width in Draft and Outline views** option.

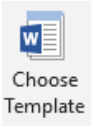


- Set the pane to 2 cm and click **OK**.

To return to Print Layout view, select **Hide Style Area**.

Choose Templates button

The **Choose Template** button at the very left of the Eurofound bar enables you to create a new report, policy brief, blog or article in the template. It does not enable you to attach a template to a document – see Attaching the template to a document further down for details on attaching the writing template to a document.



Publication Information

The Publication Information box is included in the template by default to record information about the document.

The four fields counting pages, words and characters are automatic, but need to be updated to make sure the counts are accurate. To update these fields, click the **Refresh Fields** button.

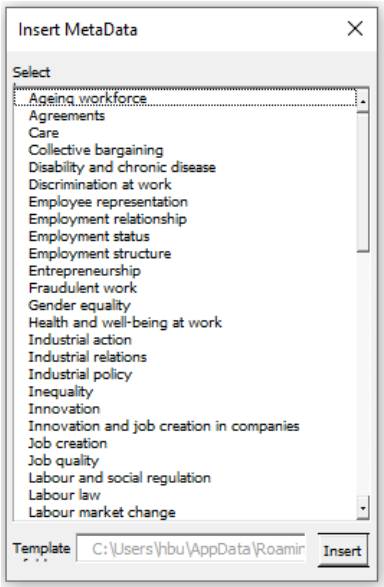
The Eurofound editor is responsible for completing the other fields.

Adding topics

The topics associated with a publication should be included in the Topics field. To populate this field, click in the field and then click the **Add Metadata** button in the General section of the Eurofound tab.

Doing this displays a scrollable list of approved topics. Click one or more items to select them and then click the **Insert** button.

The items will then appear in the field, separated by a comma.



Inserting a list of Member State codes

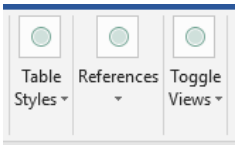
We often include a box identifying the codes associated with the Member States at the start of a report. To include this box, click the **EU Members** button in the General section.

Blogs vs articles

The same template version is used for blogs and articles. **Blog** is selected by default in the drop-down box at the top left corner of the page. You can click the down arrow to select **Article** instead.

What has happened to the Eurofound tab?

If you reduce the size of the Word window, the sections of the Eurofound tab will collapse as shown here. The commands in these sections can be accessed by clicking the down arrow.



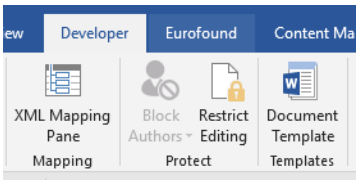
Attaching the template to a document

If you find that the Eurofound tab is not displaying or that the styles are not applying to text, the problem might be fixed by re-attaching the template to the document. To do this, you must copy the template to your own file storage (the template that you access from Word's start screen is held centrally on the network). The three versions of the writing template are available in Content Manager (TRIM) here:

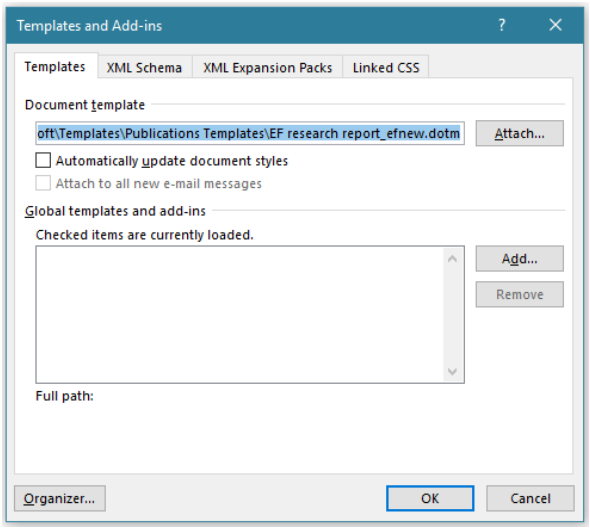
- GR-19- 8174: research report_efnew
- GR-19- 8176: policy brief_efnew
- GR-19- 8175: blog-article_efnew

The default hard drive location for saving Microsoft templates is C:\Users\<<*three-letter username*>>\AppData\Roaming\Microsoft\Templates\. It will make the procedure easier if you copy the template files here, but you can copy them anywhere. You will not, however, see the AppData subfolder in File Explorer if you navigate through the file structure, which means you need to enter this path in the field at the top of File Explorer.

To attach the template to a document, display the **Developer** tab and then click the **Document Template** button.

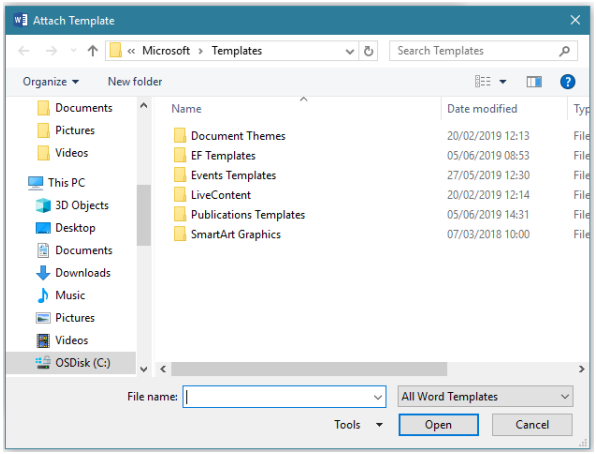


In the Templates and Add-ins dialog box, click the **Attach** button.

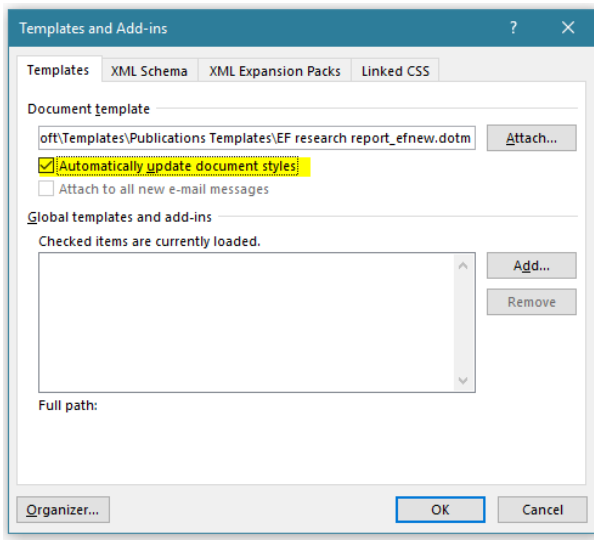


This opens the Attach Template dialog box, showing the subfolders within the Templates folder, the default location. This is why it helps to save the writing template here.

Navigate to the appropriate template file, select it and click **Open**.



Then back in the Templates and Add-ins dialog box, ensure that the **Automatically update document styles** checkbox is selected and click **OK**.



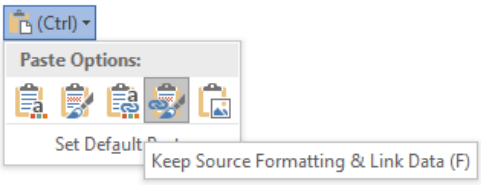
The template is now attached to your document.

Additional tips

Pasting charts into documents

The rule on pasting charts copied from Excel into Word has been to paste them as images. However, to enable charts to be updated without further copying and pasting, you can alternatively paste them using the **Keep Source Formatting & Link Data** command.

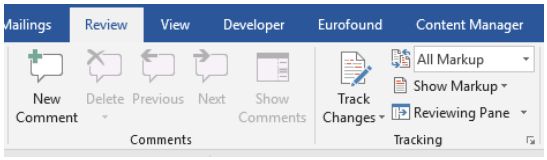
To access this command, paste chart into the document, then click the **Ctrl** button and choose the option from the pop-up menu.



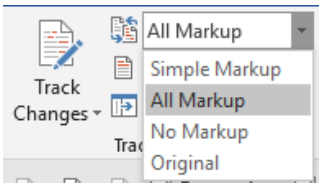
The link will not operate, however, if you are working through TRIM.

Notes on tracked changes

Options for tracking edits and adding comments are located in the Review tab.

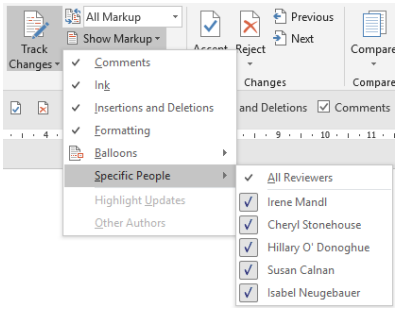


To see all the tracked changes in a document, choose **All Markup** from the drop-down list beside the **Track Changes** button.



If you want to see the clean revised document without the tracking displayed, choose **No Markup**.

If you want to see only the changes made by specific reviewers, click **Show Markup** > **Specific People** and, from the list that appears, deselect names to hide the changes made by those individuals.

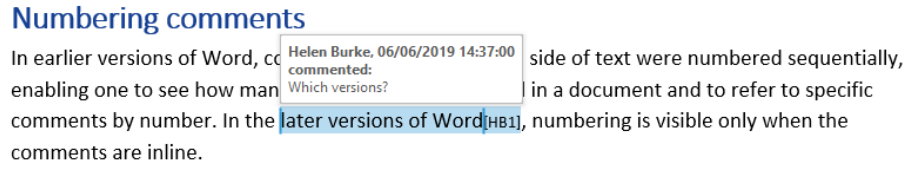


If you cannot see the comments made by reviewers, they may be hidden. Ensure that the **Comments** option in that list is selected.

You can also hide formatting changes, which can get very cluttered, by deselecting **Formatting** in that list.

Numbering comments

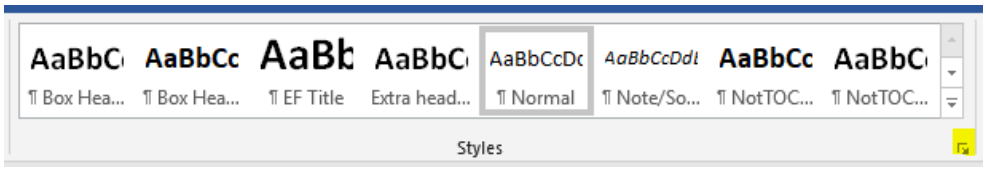
In earlier versions of Word, comments displayed in balloons to the side of text were numbered sequentially, enabling one to see how many comments were included in a document and to refer to specific comments by number. In later versions of Word, numbering is visible only when the comments are inline, like so:



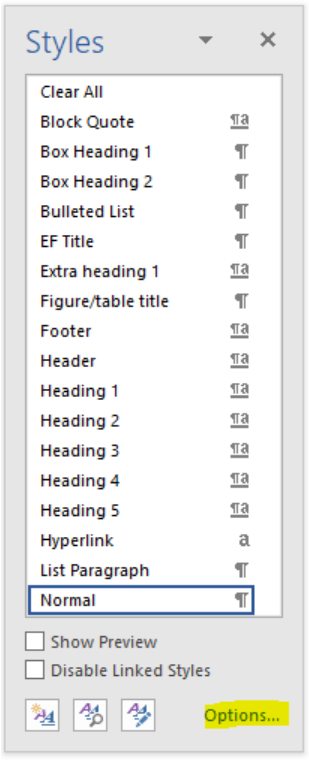
Draft view always shows comments inline, and you can go to this view by selecting **Show Style Area** on the Eurofound tab, as described earlier.

You can get around the absence of numbering in balloons by setting up comments so that the comment text is numbered. Comment text in the writing template is set up like this, but if you wish to apply this to other documents, follow the steps below.

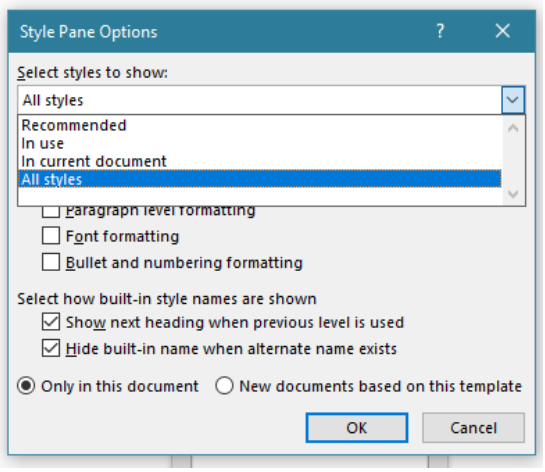
In the Home tab, click the little arrow in the bottom right-hand corner of the Styles section.



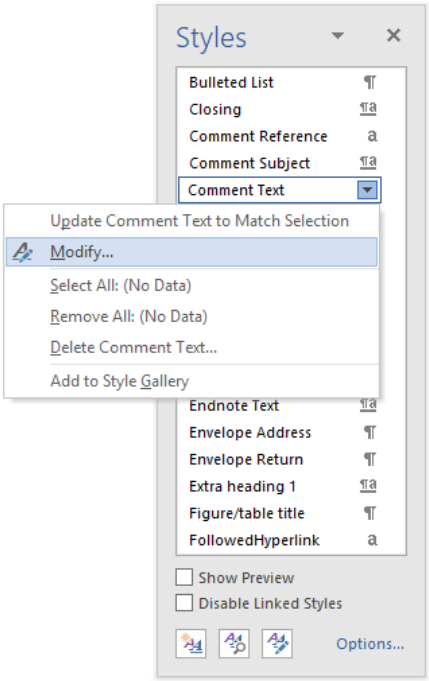
The Styles dialog box opens, by default displaying just some of the styles in the document and not the style that needs to be changed, the Comment Text style. To include all styles in the list, click **Options** at the bottom right of the dialog box.

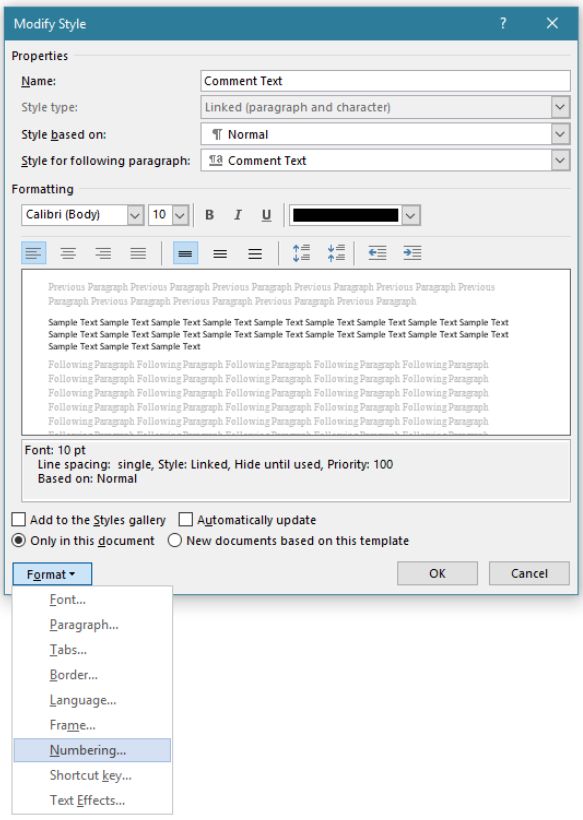


This opens the Style Pane Options dialog box. From the Select styles to show drop-down list, choose **All styles**. Then click **OK**.



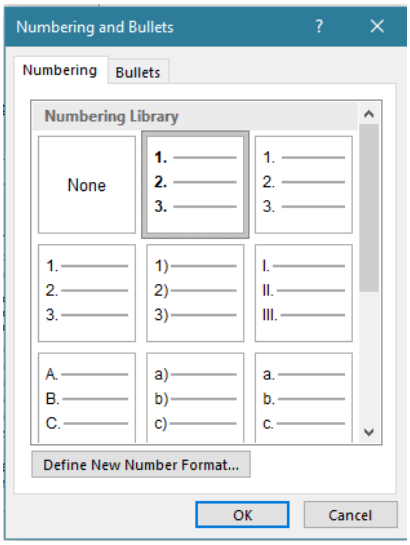
Now in the list of styles, locate the Comment Text style and move the mouse over it, which causes a down arrow to appear. Click this arrow and then click **Modify** in the drop-down list.





This opens the Modify Style dialog box, where you can change the formatting of comment text according to your own preferences. To add numbering, click the **Format** button and select **Numbering**.

Then in the Numbering and Bullets dialog box, select one of the predefined numbering styles and click **OK**.

Click **OK** again to close the Modify Style dialog box; then click the X button in the Styles dialog box to return to the document.

Any comments added to the document will now be numbered sequentially. Replies to comments will also be included in the numbering sequence.