

TEMPLATE WALKTHROUGH

TABLE OF CONTENTS

How to Use This Template Walkthrough.....	2
Links to Resources.....	2
A Note on Accessibility	3
A Note on Styles.....	3
Spacing	3
Capitalization.....	4
Page Numbering	5
Title Page	5
Abstract.....	7
Dedication	8
Acknowledgements	8
Contributors and Funding Sources.....	8
Nomenclature.....	8
Table of Contents	8
List of Figures.....	10
List of Tables	11

Body of Work.....	11
Tables and Figures.....	12
References.....	13
Appendix	13
Converting Your Basic Template to PDF	14
Checking if Your PDF Meets Accessibility Standards.....	15
Important Read Before Submitting to Vireo.....	21

How to Use This Template Walkthrough

Using the thesis/dissertation/record of study Basic Template together with this walkthrough and the Sample Manuscript will help ensure your document meets The Graduate and Professional School's formatting requirements and complies with accessibility standards once converted to PDF. This walkthrough is designed to be used alongside the Sample Manuscript, which provides additional explanations and examples for proper formatting and accessibility. For more technical guidance, refer to the Additional Template Assistance resource, which offers solutions for formatting or accessibility issues in specific sections.

Links to Resources

The Graduate and Professional School offers several resources to assist you throughout the formatting process:

1. Basic Template
2. Template Walkthrough

3. Additional Template Assistance
4. Sample Manuscript

A Note on Accessibility

Our office has created a template designed to meet accessibility standards. However, even when using the template, your final PDF document may not fully comply with accessibility requirements. For example, manually adjusting styles or inserting images without alt text can lead to non-compliance. **Ensuring compliance with accessibility requirements is ultimately the student's responsibility.**

A Note on Styles

Using Word Styles supports screen reader functionality and ensures accessibility compliance. When formatting your manuscript in the Basic Template, use only the provided Word Styles in the taskbar for your title, major/chapter headings, and subheadings. These styles have been specifically formatted to ensure your manuscript complies with both accessibility standards and The Graduate and Professional School's formatting requirements.

Spacing

1. Your manuscript should be entirely double spaced (2.0). Only a few sections should be single-spaced, and these are already formatted correctly in the template.
 - Committee section on your title page
 - Subheadings in your Table of Contents
 - Secondary lines in your Table of Contents where major headings exceed one line of text

- Secondary lines in your List of Figures and/or List of Tables where listings exceed one line of text
2. Major headings and chapter headings should have two doubles spaces between the heading and first line of text.
 3. There must be no blank pages in your manuscript.
 4. All chapters must start on new pages.

Capitalization

The following should be in all capital letters:

- Title – Title Page
- Legal Name – Title Page
- Degree – Title Page
- Chapter headings and preliminary major headings
 - Preliminary major headings include: Abstract, Dedication, Acknowledgement, Nomenclature, Contributors and Funding Sources, Table of Contents, List of Figures, and List of Tables

Subheadings must follow one consistent capitalization style throughout your document or section. You may choose one of the following two formats, but do not mix them within the same set of subheadings:.

- **Title case:** Capitalize all major words, except for short articles and prepositions (four letters or fewer). Example: *How to Improve Writing Skills*.
- **Sentence case:** Capitalize only the first word of the subheading, along with proper nouns and appropriate acronyms. Example: *How to improve writing skills*.

Page Numbering

All preliminary pages use lowercase Roman numerals to distinguish them from the main body of the document. Preliminary page numbering begins on the Abstract page with “ii”. The document body starts with Arabic numeral 1. The template is already formatted to apply proper pagination. If you encounter issues, check for page breaks or section breaks by pressing CTRL + Shift + 8 (Shift + 8 on Mac) to reveal formatting marks. For additional help with pagination, refer to the Additional Template Assistance resource available online.

Title Page

1. Replace the placeholder title with your own manuscript title. Be sure to retain the Title Word Style to maintain proper formatting. If you need to create a new line within the title, **do not press Enter**. Instead, **use Shift + Enter** to insert a soft return. This prevents Word from interpreting the second line as a separate title.
2. For accessibility purposes, you must add the document title to the Word file’s properties. This ensures your title is properly embedded and attributed when the document is converted to a PDF.

On PC:

- a. Select File
- b. Select Info
- c. Paste your title into the ‘Title’ field in Properties (indicated by arrow in Figure 1).

On Mac:

- a. Select File
- b. Select Properties

- c. Select Summary and paste your title into the 'Title' field (indicated by arrow in Figure 2)

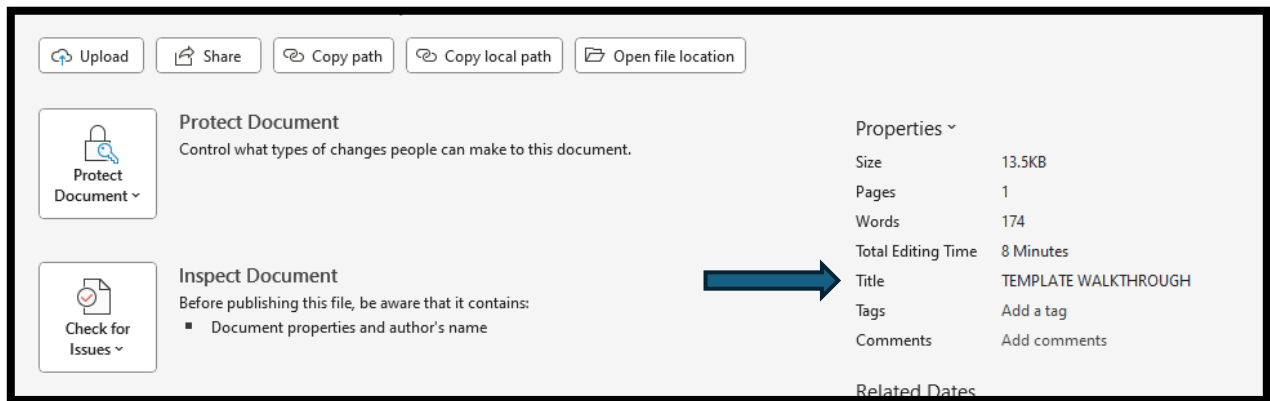


Figure 1 Insert Document Title in Properties on Word for PC

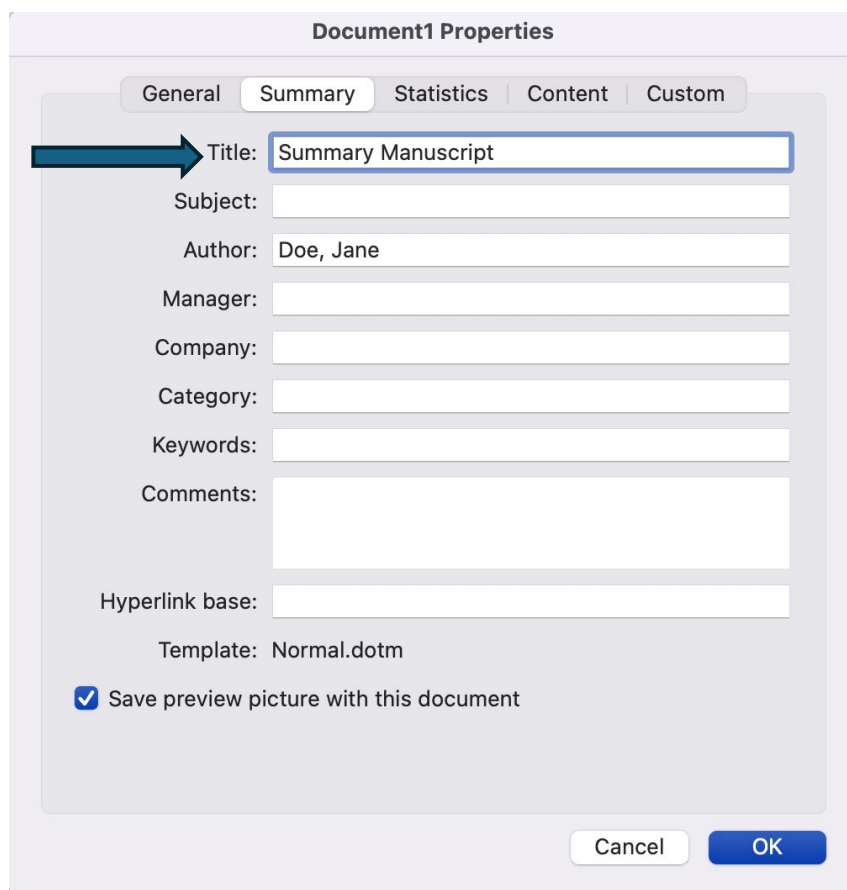


Figure 2 Insert Document Title in Summary on Word for Mac

3. Maintain the spacing as formatted in the template. If spacing changes occur, refer to the Sample Manuscript available on our website for an example of a title page that follows TDS guidelines.
4. Your name on the title page **must exactly match university records**. If it does not, your reviewers will not approve your manuscript until the discrepancy is resolved.
5. The committee section is the only part of the title page that is left-aligned and single-spaced. If you experience misalignment with the left tab stop, refer to the Additional Template Assistance resource on our website.
6. Do not include titles such as *Dr.* or *Professor* for your committee members or department head.
7. The graduation term should reflect the month in which you graduate, not the month of your defense.
8. Your title page should not have a page number.

Abstract

1. The Abstract must always begin on page 'ii', no exceptions.
2. The Abstract is a standalone document and should not include citations. It is labeled with the primary heading style as ABSTRACT, and it should not contain any subheadings.
3. The Abstract should be no longer than 3 pages and no shorter than half a page.
4. Delete the text box included in the template.

Dedication

1. The Dedication page is optional.
2. Manuscripts cannot be edited after publication, so please be mindful when writing your Dedication.

Acknowledgements

1. The Acknowledgements page is optional.
2. Manuscripts cannot be edited after publication, so please be mindful when writing your Acknowledgements.

Contributors and Funding Sources

1. The Contributors and Funding Sources page is mandatory and must be included.
Both subheadings, Contributors and Funding Sources, are also required.
2. If you did not receive any outside funding, please indicate this with at least one sentence under the Funding Sources subheading.
3. Delete the textbox included in the template.

Nomenclature

1. The Nomenclature page is optional.
2. If included, it should be formatted consistently, with uniform indentation for the definitions. If you experience misalignment with the left tab stop, refer to the Additional Template Assistance resource on our website.
3. Delete the textbox included in the template.

Table of Contents

Please do not delete the Table of Contents. It has been preformatted in the template to meet all required guidelines.

1. The word “Page” must appear at the top of the pagination column and be properly aligned. It should already be included and correctly positioned in the template.
2. Roman numerals used for preliminary pages must be lowercase.
3. The Abstract must appear on page ‘ii’.
4. The main body of your manuscript must begin on page ‘1’.
5. The Table of Contents is preformatted in the template.
 - a. On PC: When adding new Major/Chapter headings or Subheadings using Word Styles in your manuscript, you can update the Table of Contents by right-clicking it and selecting “Update Table”, then “Update Entire Table.” This will only work if headings and subheadings are created using Word Styles.
 - b. On Mac: When adding new Major/Chapter headings or Subheadings using Word Styles in your manuscript, you can update the Table of Contents by selecting “Update Table” from the References toolbar, then “Update Entire Table.” This will only work if headings and subheadings are created using Word Styles.
6. Leader dots are required and are already formatted in the template.
7. Delete the text box and remove the blank page, if applicable.
8. References must always appear before the Appendix.
9. If you assign titles to your Appendices, they must also be included in the Table of Contents.

List of Figures

Please do not delete the List of Figures (unless your manuscript contains no

figures). This section has been specifically formatted in the template to meet required guidelines.

1. The word “Page” must appear at the top of the pagination column and be properly aligned. It should already be included and correctly positioned in the template.
2. Leader dots are required and are already formatted in the List of Figures section.

To add a figure to the manuscript:

1. Insert the image and choose ‘Top and Bottom’ under the Wrap Text options.
2. Insert the figure title:
 - Right click the image and select ‘Insert Caption’.
 - Enter your figure title. The figure title and additional text will appear below the figure.
 - Note: Only the first sentence of your figure title should display in your List of Figures. Additional text in the figure legend should not appear in your List of Figures. Instructions are provided in the Basic Template to assist with hiding excessive text in the list of figures.
3. Right click the image and add Alt Text (it will say View Alt Text on Mac) to the figure to ensure accessibility compliance.
4. Do not mark the image as Decorative because it will not have Alt Text upon conversion to the PDF.

Update your List of Figures:

1. Go to the References tab and select 'Update Table' in the Captions section and select 'Update Entire Table'. Be sure to toggle between 'Figure' and 'Table' depending on whether you are updating the List of Figures or the List of Tables.

List of Tables

Please do not delete the List of Tables (unless your manuscript contains no tables). This section has been specifically formatted in the template to meet TDS guidelines. The List of Tables follows the same formatting instructions as the List of Figures.

You will follow the same list of instructions as the List of Figures section, except, you will toggle the Label in the Insert Captions feature from 'Figure' to 'Table'.

Body of Work

Your manuscript may follow a traditional format, with chapters organized as Introduction, Methods, Results, and Conclusion, or it may consist of standalone journal-style chapters intended for publication. If you choose the latter format, it is still common (but not required) to include a brief introductory chapter and a final discussion chapter to unify the individual manuscripts under a cohesive theme.

If you're unsure which format to use, consult your committee chair and check whether your department, college, or school has specific formatting guidelines.

1. Major/chapter headings should be formatted using the HEADING 1 Word Style. This ensures your chapter titles appear in the Table of Contents and that your manuscript remains accessible.

- If you need to add an additional line of text to your heading, **do not press Enter**. Instead, **use Shift + Enter** to create a soft return. This prevents Word from interpreting the second line as a separate heading in the Table of Contents.
2. There needs to be two double spaces between the chapter heading and first line of text.
 3. Subheadings must be formatted using Word Styles. **Do not manually create your own formatting if you are using the template**. If Word Styles are not used, your subheadings will not appear in the Table of Contents when you update it.
 - Subheadings follow a hierarchical structure. For example, a Level 3 subheading cannot appear before a Level 2 subheading.

Tables and Figures

1. Tables and figures must fit within the page margins.
2. Large tables or figures may be placed on a landscape-oriented page. If you use landscape orientation, the page number must still appear at the bottom center, and the content must remain within the margins.
3. **All figures must include Alt Text to meet accessibility standards**. For more information on applying Alt Text to figures and examples, please refer to our Sample Manuscript. For additional assistance on Alt Text, please visit the [TAMU IT Accessibility page](#) for more information.
4. **Further information on accessible tables with examples can be found in the Sample Manuscript. Tables must also comply with accessibility guidelines, which include (but are not limited to):**
 - No merged or split cells

- A simple readable structure
- Avoid complex, nested, or irregular tables. Use a simple grid format wherever possible to maximize compatibility with assistive technology.
- No empty cells
- Use the "Repeat Header Rows" feature in Word for tables that span multiple pages. Mark the first row as a header row, so screen readers can announce it properly

References

1. References should be organized either in alphabetical order or chronological order and may be numbered depending on your citation style.
2. References must follow one of two formatting styles: either the entire reference list is double spaced throughout, or there is double spacing between each individual reference entry. Do not combine both styles.
3. You may choose to place your References on a separate page at the end of the manuscript, or at the end of each chapter.
 - If you place References at the end of each chapter, the heading "References" should be formatted as a Level 1 subheading and included in the Table of Contents.
 - Be sure to use Word Styles to ensure proper formatting and accessibility

Appendix

1. The Appendix is optional.
2. Figures and tables in the Appendix do not need to be included in the List of Figures or List of Tables. However, if you choose to include some, you must include all.

3. Any figures or tables must fit within the established margins.
4. Subheadings in your Appendix do not need to be included in the Table of Contents.

However, if you choose to include some, you must include all.

Converting Your Basic Template to PDF

Your manuscript must be converted to a PDF document. **Vireo will only accept primary files if they are in PDF Format.**

Please review the Sample Manuscript provided by our office. If your manuscript does not match the formatting of the sample, revise it before proceeding. Manuscripts that do not follow our formatting guidelines will be returned without an initial review.

To convert your manuscript to a PDF on PC:

1. Select Acrobat from your taskbar.
2. Select 'Create PDF and Run Action', then choose 'Make Accessible'.
 - a. **Note:** Selecting the 'Make Accessible' feature does not guarantee full accessibility. Having a PDF that passes the accessibility report in Acrobat depends heavily on the quality and accessibility of the original Word document.
3. Save the newly created PDF version of your manuscript.

To convert your manuscript to a PDF on Mac:

1. Select File
2. Select Save As (Or Export depending on your version)
3. Select Save As PDF (Or Export depending on your version)
4. Make sure you select the "Best for electronic distribution and accessibility" option to ensure your manuscript is tagged

5. Save the newly created PDF version of your manuscript.

Checking if Your PDF Meets Accessibility Standards

Students are required to utilize the Accessibility Report tool in Adobe Acrobat to ensure their manuscript meets accessibility standards.

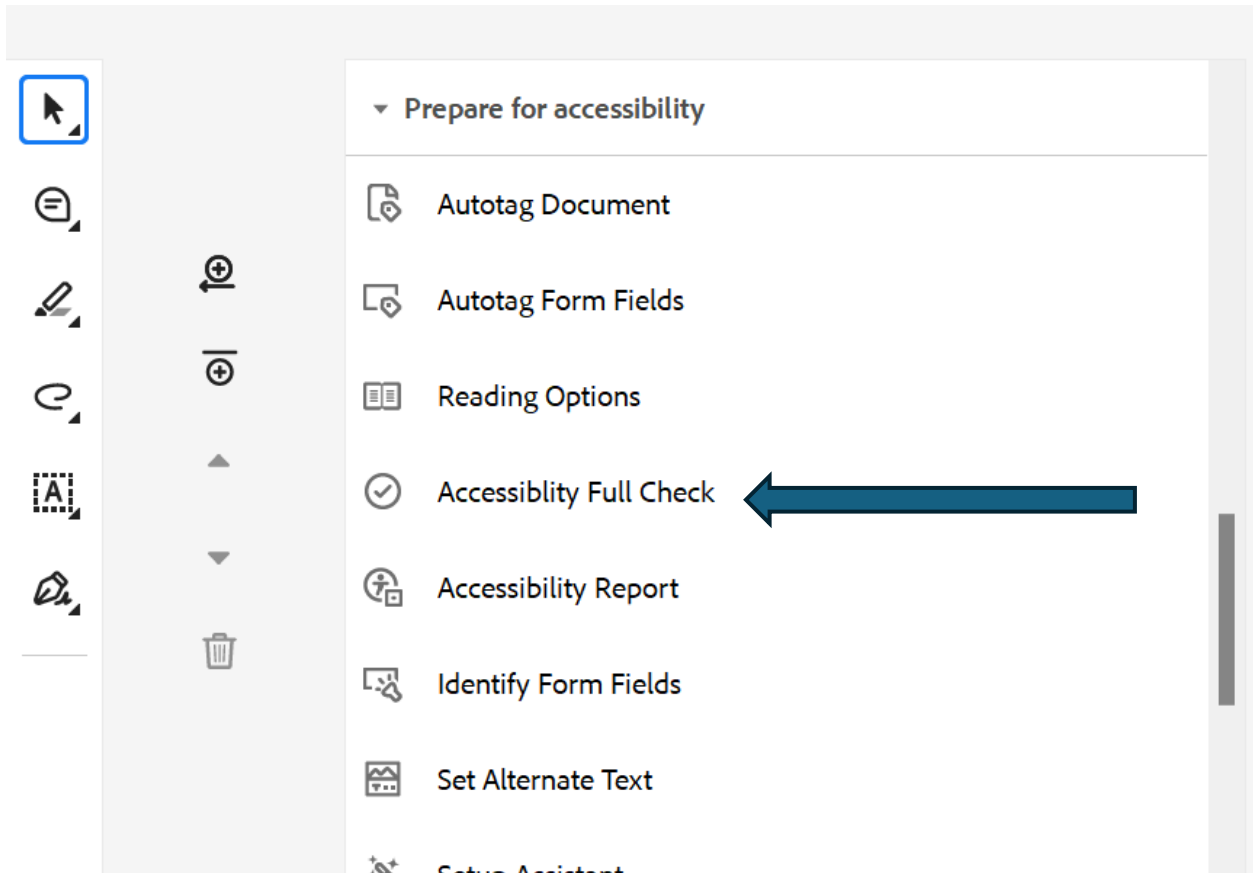
First you will need to pin the Accessibility Full Check tool in Adobe Acrobat:

1. Open the PDF version of your manuscript in Adobe Acrobat Pro.
2. Select the Add/Edit Tools button (indicated by the arrow in the figure below).

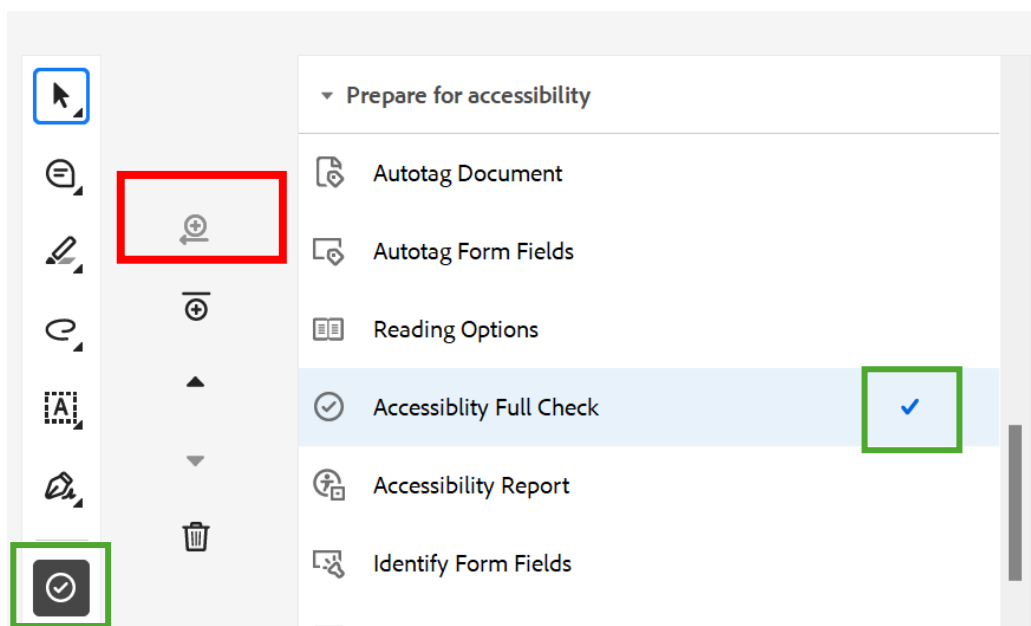


3. Select 'Customize Toolbar'.

4. Scroll down through the options until you see the drop-down selection for “Prepare for Accessibility”.



5. Locate and select the ‘Accessibility Full Check’ tool (indicated with a blue arrow in the figure above.)
6. After selecting ‘Accessibility Full Check’, click the Add Tool button (indicated by the red box in the figure below) to pin it to your taskbar. Once added, a checkmark will appear next to the tool, and it will be visible on your toolbar (indicated by two green boxes in the figure below).



7. Click save to confirm and permanently add the tool.

Now that you have your toolbar set up, you will run an accessibility check before you submit your manuscript in Vireo:

1. Select the Accessibility Full Check tool (icon: checkmark inside a circle).
2. In the dialog box, ensure the Accessibility Report is checked in addition to all the indicated boxes in the example figure below.

Accessibility Checker Options

Report Options

☒ Create accessibility report

Folder: C:\Users\mkharden\AppData\Roaming\Adobe\Acrobat\DC\AccReports Choose...

☒ Attach report to document

Page Range

☒ All pages in document ☐ Pages from to

Checking Options (31 of 32 in all categories)

Category: Document

☒ Accessibility permission flag is set

☒ Document is not image-only PDF

☒ Document is tagged PDF

☒ Document structure provides a logical reading order

☒ Text language is specified

☒ Document title is showing in title bar

☒ Bookmarks are present in large documents

☒ Document has appropriate color contrast

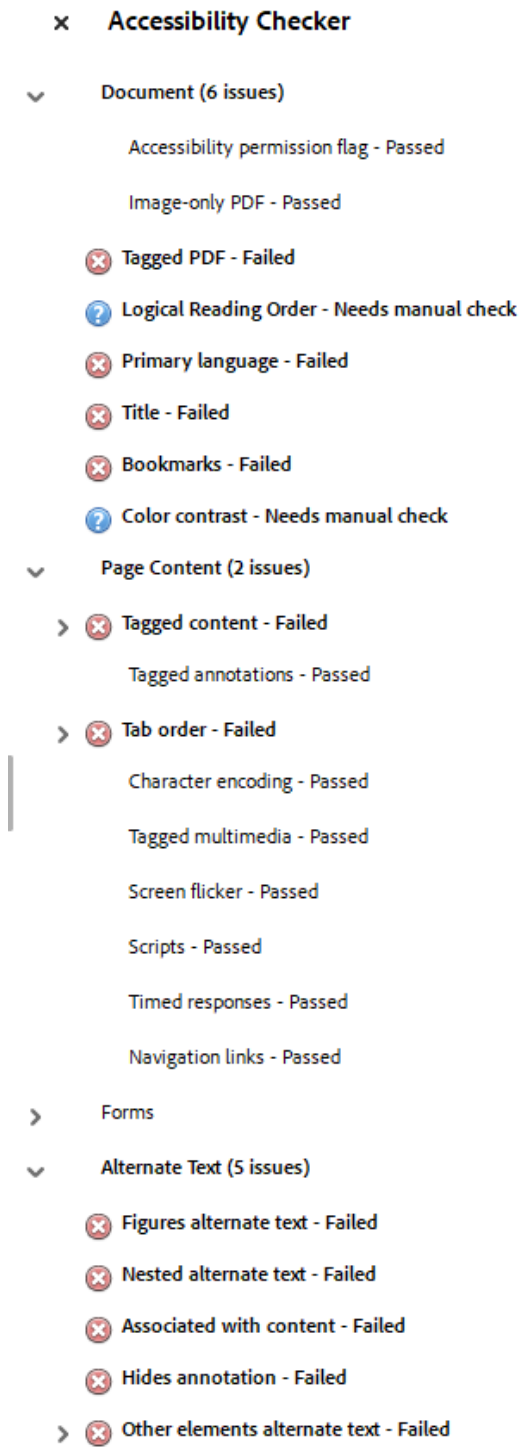
Select All Clear All

☒ Show this dialog when the Checker starts

Help Start Checking Cancel

3. Select 'Start Checking'.
4. Review any flagged issues and investigate them carefully.

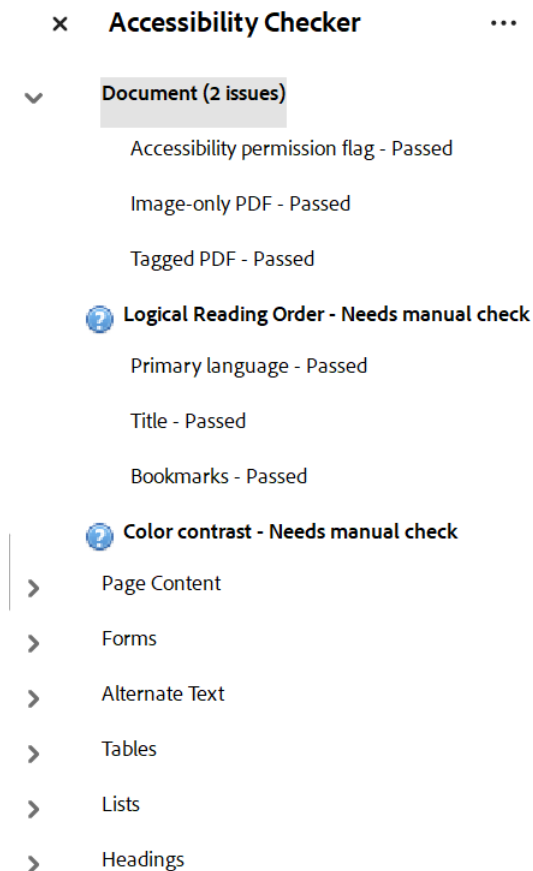
5. Example Failed: Failed checks will result in a returned manuscript (See figure below).



6. Example Passed: **Two manual checks will always appear as flagged issues.**

These DO NOT count as failures:

- a. These issues are: Logical Reading Order and Color Contrast
- b. Below is an example figure of a **passed accessibility** report showing only the two manual issues.



7. Once your manuscript passes the accessibility check, you may proceed to upload it to Vireo.

Important Read Before Submitting to Vireo

1. Failed accessibility reports will result in a returned manuscript without an initial review. **Any report with one or more red X's will be considered a failed accessibility report.**
2. There will always be two issues that flag on your accessibility report. These are logical reading order and color contrast. These two manual issues are expected and **do not** count as failures.
3. The TDS office does not provide troubleshooting for accessibility issues. Students should consult the [TAMU IT accessibility website](#) for resources on meeting accessibility requirements.