

# How to Turn a Word Document into a Job Aid

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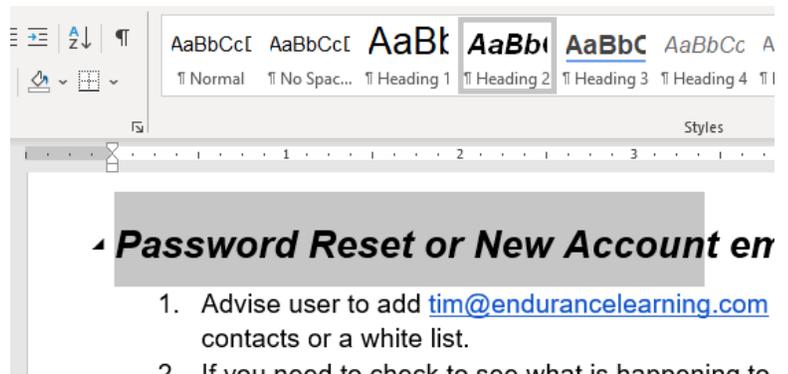
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## 1. Open a Word document

Ok. This is a simple step. The important thing is that you can do this with a new or existing document. For example, if you have an existing Word document that lists 40 FAQs, you can build it into a more usable and useful resource for customer service or sales teams. If you are using an existing doc, you will want to pay close attention to how the formatting was done. You'll see more about this in step 2.

## 2. Create Headers or Check Header

If you are creating a new resource, begin by organizing your content using Headers. If you haven't done this before, you're missing a powerful tool. Many people will organize a document in an outline or will simply bold a phrase to make it the header. This may work fine for looking at a document that is printed, but it doesn't tell Word what you mean by that header. This will become absolutely critical in step 3.



If you are modifying an existing document to create your job aid, you'll find that many people don't use header styles. You can quickly tell by finding text that looks like a header. Click on it once and look at the top banner in Word. If the style says Normal or anything other than Header 1, Header 2, etc. you will need to apply those styles. This part is easy but can be time-consuming. Highlight that line that you want to be the header and click the header style.

### ***How many header layers should I use?***

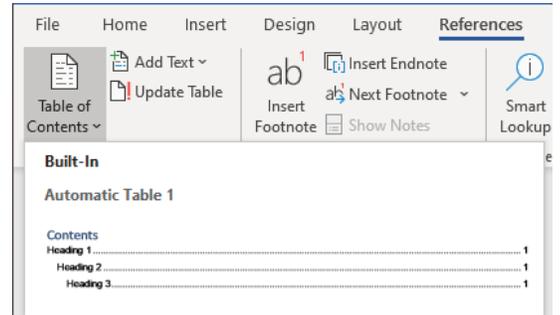
Microsoft will automatically give you styles for multiple levels of headers. The question of whether to use these levels has less to do with what is possible and more to do with what is usable. If you want the document to be usable, we generally find that using 1 or 2 levels is going to give you the best structure for most documents. It will be up to you to determine what works best for your content, but just remember that you are trying to make

life easier on your front-line staff. You don't want to spend too much time explaining how to use a complicated job aid.

### 3. Create a Clickable Table of Contents

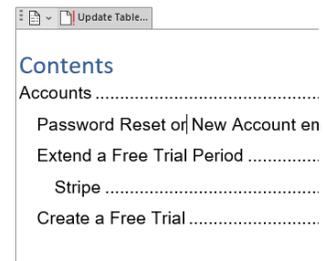
This is the step that is the most magical in Word. If you've done the previous steps, it is both easy and effective. You may think of a table of contents as something that points you to the correct page number, but the best part of the table of contents in Word is that it is clickable! If you have a 70-page document and 140 questions answered, a clickable table of contents is the only way that sales reps or customer service reps can realistically navigate that information and provide quick answers.

From the References menu, click **Table of Contents** and insert an **Automatic Table**. The Automatic Table of Contents will use the headers that you created in step 2.



### *Refresh Your Clickable Table of Contents*

One reason that you may choose to create a job aid in Word is that you expect the information to need updates. When you make an update there is one little step that you can't forget. If you add a new topic (a header) or change an existing header, you must refresh the table of contents. This is also true if you set up your table of content while in the process of creating your document.



### 4. Create a PDF

Most likely, you are not creating a document that you want others to edit. If this is the case, you should use Microsoft Word's built-in ability to convert a document into a PDF.

