User Guide

# "How to" Guide

*A guide to maintaining and updating the User Guides for the
Puget Sound Regional Catastrophic Preparedness Grant Program*

Last updated 9/10/14

The Role of the User Guides in the RCPGP

The User Guides provide an overview of the Plan, Annex or Toolkit that it precedes. The Guide works as a graphic, interactive portal that organizes access to the main document in a more user-friendly, phase-oriented format.
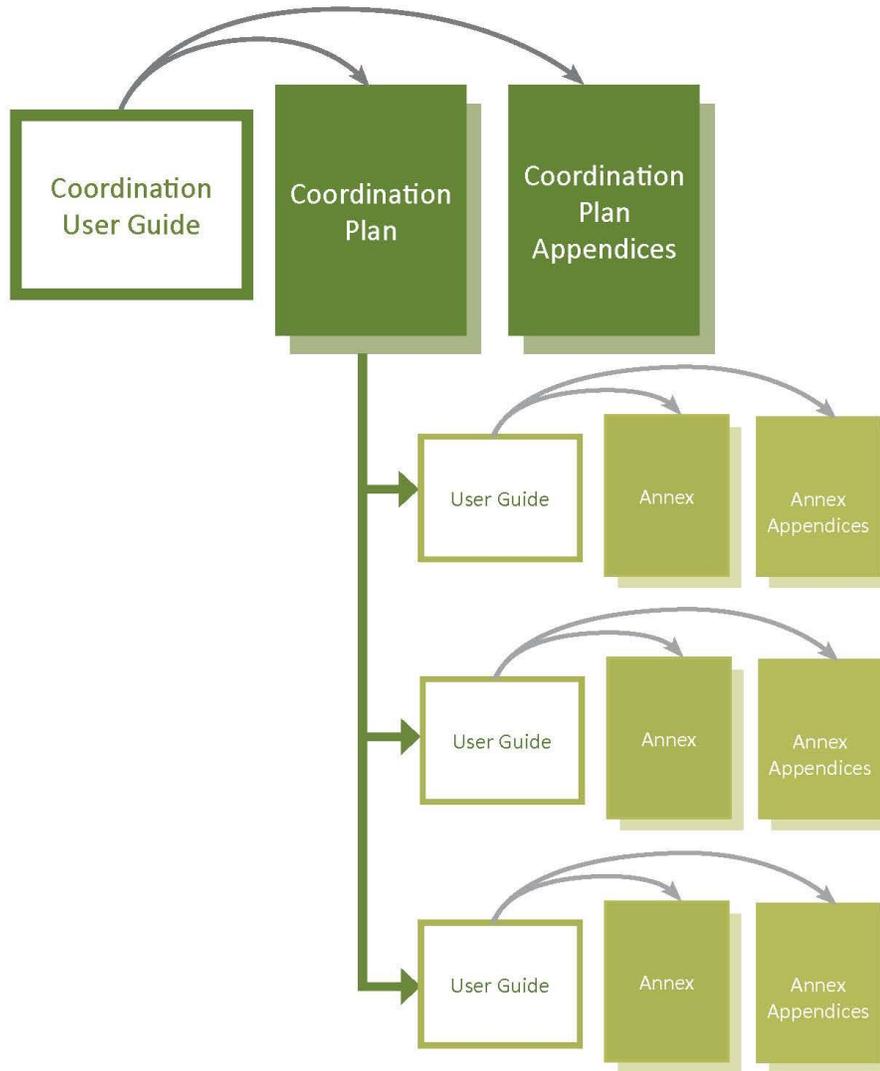
Toolkits and Annexes to the Coordination Plan include: Evacuation, Medical Surge Support Tool, Pre-Hospital Emergency Triage and Treatment, Resource Management and Logistics, Sheltering, Structural Collapse Rescue, Transportation Recovery, Victim Information and Family Assistance, Volunteer and Donations Management.

All documents also include links to external documents housed on the web.

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I. Introduction

The Puget Sound Regional Catastrophic Disaster Coordination Plan and its several Annexes and Toolkits (referred to as planning documents) were developed with funding made possible by the Regional Catastrophic Preparedness Grant Program beginning in 2008. In 2011, BERK Consulting was hired to develop User Guides that would precede several of the planning documents and provide links to key areas in those documents, as well as links to external reference documents. User Guides and the agencies tasked with updating these documents are identified in Table 1: List of User Guides.

Table 1: List of User Guides and Planning Documents with Respective Leads

Plan/Annex/Toolkit	Jurisdictional Lead(s)	Individual Lead as of August 2014
Coordination Plan	King County OEM	To Be Determined
Evacuation Annex	Pierce County Emergency Management	Nicole Johnson
Medical Surge Resource Management Toolkit	Public Health- Seattle and King County	Ashley Kelmore
Pre-Hospital Emergency Triage and Treatment Annex	Seattle Fire Department	Josh Pearson
Resource Management and Logistics Toolkit	Thurston County Emergency Management	Sandy Johnson
Sheltering Annex	Pierce County Emergency Management	Nicole Johnson
Structural Collapse Rescue Annex	Bellevue Fire Department	Keith Allen
Transportation Recovery Annex	Washington State Department of Transportation	John Himmel
	Snohomish County Office of Emergency Management	Jason Biermann
Victim Information and Family Assistance Annex	Public Health- Seattle and King County	Ashley Kelmore
Volunteer and Donations Management Toolkit	Pierce County Emergency Management	Nicole Johnson

Washington State Emergency Management Division (EMD) posts the Coordination Plan, Annexes and Toolkits on their website, www.emd.wa.gov, located under the Regional Catastrophic Preparedness Grant Program of the 'Plans' Section.

The purpose of this "How To" Guide is to provide direction for individuals tasked with updating the plan, annexes and toolkits listed above in Table 1. This guide provides guidance on how to keep each User Guide as a useful tool that not only helps with navigation of the planning document, but also provides references to important external materials.

II.   Updating User Guides

A. Important Steps for Updating User Guides

When updating the planning document, update the User Guide. The Coordination Plan and each Annex or Toolkit has a jurisdictional lead that is responsible for updating information in the documents as noted in Table 1.

The User Guides will be easier to update if you do not change much of the formatting – try not to change the headers/ footers, styles etc. Please review the following steps when making updates to the User Guides.

1. Deciding to Make Changes to a Planning Document and its User Guide.

- Once the planning document has been updated, it is time to update the User Guide that precedes the planning document.

- When you are finished making edits to the planning document, review where those changes might impact the attached User Guide.

2. Microsoft Word.

- All changes to planning documents should initially be made in Microsoft Word.

3. Internal and External Links.

Check each of the links in the User Guide to ensure that it still takes the reader to the correct reference point. The steps listed below demonstrate how to make changes to internal and external links.

- *Internal Links*: Internal links are linked to places within the current document. Even though they have a page number associated with them, they link to the information not the page itself. Even if you were to add pages and that information were to move, the link would still go to the right information. So in the example below, Goals of the ERCG can be viewed on (p.9).

<p align="center">**Figure 1: The Location of an Internal Link on a User Guide**</p>

When clicking on the highlighted link, you will be taken to where that information exists in the planning document. Even if the page number changes, the link will still go to the correct information in the planning document. This is seen in Figure 2.

Figure 2: The Destination of a Link in a Planning Document

- To change the page number of an internal link in a User Guide, you can highlight the numbers without highlighting the parentheses or the letters with your cursor and change the page number. You can also re-make the link, by referring to Hyperlinks in Section III: References.

- *External Links*. External links go to documents and websites outside of the document. An example from the Evacuation Annex is: ***Recommendations for a National Mass Patient and Evacuee Movement, Regulating, and Tracking System***

   In order to create an external hyperlink, refer to Hyperlinks in Section III: References.

4. Linking to Other Annexes and Toolkits

The Coordination Plan links to all the different Annexes and Toolkits, and some of the planning documents link to other planning documents. For example, the Evacuation Annex links to the Transportation Recovery Annex. When linking to another Annex, create an external hyperlink by using the web address listed in Table 2: List of Naming Conventions.

5. When finished with the document, save one copy with the original name.

- For links to work, it is important to keep the original document name. If the names of documents are changed, links will break. Column 2 in "Table 2: List of Naming Conventions" provides the correct name to use for your document.

- While the final document must be named as noted above, you may want to keep iterative versions of the document you are responsible for as records. For example, you may have files titled "EvacuationAnnex 2.0," "EvacuationAnnex 2.1," "EvacuationAnnex September 2015 Update." etc. In another folder, you can re-save the version you are going to send to the State EMD website administrator for uploading as "EvacuationAnnex".

- If you are uncertain of which document is the most updated version, you can refer to the date modified column in the file folder.

6. Transition from Word to PDF

Once the Word document (planning document and User Guide) is complete, it must be converted to a PDF format before it is posted on the Web. Save the Word document to a PDF by going to the File button on the upper left hand screen. In the drop down box, you will find an option that says "Save as Adobe PDF". Click on it and follow the prompts.

For more information, refer to PDF in Section III: References.

7. For more detailed information with how to update elements of a User Guide, refer to Section III: References.

III.   References

The following is a selection of tools in Microsoft Word that were used in formatting the User Guides. This overview of tools will be useful for anyone updating or working in the documents, and will link the updater to external resources on the web. The text that is blue or purple and underlined is links to external sites.

A. Document Formatting Tips

Many of the following links will send you to Microsoft Office Support websites. If a link does not work, you can search for each of the following topics on Google. For example, Microsoft Office + Headers.

1. Color Palette
Please use the existing pre-defined colors for all text styles and graphics.

2. Exhibit References
For information on how to create Captions in Word (i.e. Table 2: Naming Conventions) go here.

For information on how to create cross references in Word (i.e. Where Table 2 is referred to in a paragraph) go here.

3. Headers and Footers
The User Guides and planning documents have consistent headers and footers that should be followed as any changes are made to the documents. Help with working in headers and footers can be found in this slideshow.

4. Hyperlinks
Hyperlinks are used in the User Guides to link to internal locations within the User Guide or the planning document (blue box links using the style "UG Link Within UG"), or to external links outside the document (blue underlined text using the style "UG Link Outside UG"). Hyperlinks can be created using two different methods: 1) bookmarks and 2) heading styles.

Bookmarks create a customized reference within the document. Existing headings styles can also be used as reference points for hyperlinks. A tutorial describing both methods for creating internal hyperlinks can be found here.

A tutorial on creating bookmarks can be found here.

To learn about creating hyperlinks for web pages, click here.

5. Page Numbering
The documents use page numbers that reference the current section. To learn how to add page numbers with chapter heading notation, see this tutorial.

6. PDF

There are several known ways to convert Word documents to PDF. When converting these documents, it is imperative that the many links within them are maintained. Because of this, clicking File→Save As→PDF is the most reliable way to convert them. For more tips and tricks on saving as PDF, click on the links here and here.

7. Section Breaks

The User Guides and Annexes use "next page" section breaks between chapters to organize the document sections. Add section breaks using the next page section break function as described in this tutorial.

To delete a section break, follow these steps.

8. Styles

The User Guides and Annexes are produced using a set of specific styles. For the document to function properly, it is critical that these Styles be used. Refer to the Style Window (see below on how to open the Styles Window) to see styles that are used in the document. If it is unclear what style an element of the document should be, click on an example of that element in a different section and identify its current style in the list of styles. Refer to the following tutorial for an overview of style basics.

- To open the Style Window, click the small arrow at the bottom right of the Styles area of the "Home" tab on the Ribbon:

Figure 3: How to Open the Styles Window
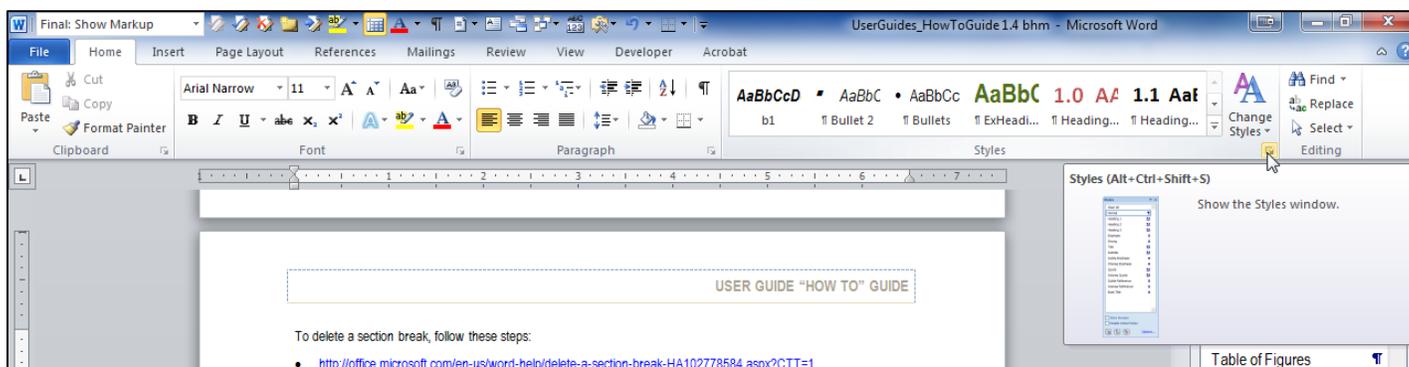
The following Styles are the main styles used in the User Guides:

Style	Text	Where it is Used
UG Bullets	• Calibri Size 11	To describe key points or ideas.
UG Heading 1	**Cambria Size 16**	Page Headings
UG Heading 2	Calibri Size 15	Page Sub-Headings

| Style	Text	Where it is Used
UG Link outside UG	**UG Link outside UG**	To link to documents or websites outside the User Guides and planning documents
UG Link within UG	Link **(p.9)**	To link within the User Guide or planning documents
UG Normal	Calibri Size 11	Body Text
UG Page Title	Cambria Size 18. White Font	Page Titles

9. Table Formatting

Much of the text in the User Guides can be found in tables, so be aware of the added formatting options that these tables will have when working with the User Guides. Table formatting options are explained here.

In order to turn on all the table gridlines in a document, click on a table, go to the table menu, and click Show Gridlines. This can be seen in Figure 4.

Figure 4: How to Turn on Table Gridlines
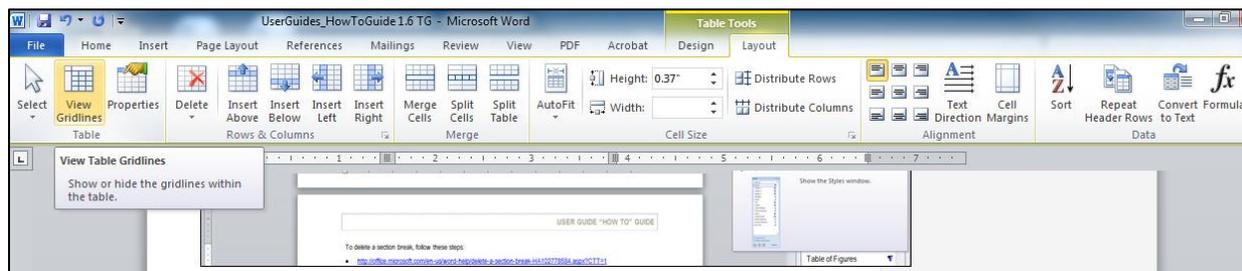
10. Table Headers

For information on maintaining consistency among table headings (i.e. repeating the heading row on a table, not breaking a row across a page), review this link.

11. Table of Contents

For information on how to create and update a Table of Contents, review this link.

## B. Important User Guide Components and Conventions

Style and consistency are integral to the function of the Annexes and Toolkits. The various documents function as a set, and therefore must remain consistent. By keeping each iteration of the Annexes and Toolkits (which include their User Guides) consistent, we ensure that they are functional and usable by a range of emergency management professionals and that they are translatable across the region. Below are a few of the foundational characteristics in each document.

- **Overview and Context Page** - Each document has an overview and context page introducing the User Guide and the function of the Plan, Annex or Toolkit. This page provides important information about each Plan, Annex,

or Toolkit and instructions on how to use the User Guide. This page should look relatively uniform throughout the documents.

- **Navigation Pages** - Each User Guide has a navigation page that is a cornerstone of its functionality. The navigation page breaks up the Plan, Annex, or Toolkit's content by time period after a major incident. The page includes several important links to pages of the User Guide in order to efficiently help personnel to locate the information they need.

- **User Guide Pagination** - The User Guides have their own pagination structure that varies from the Plan, Annex or Toolkit pagination. This is intentional as it helps distinguish between information found within the User Guide and information found within the Plan, Annex or Toolkit. User Guide pages look like this: UG-[page number]. Whenever you see a link within the User Guide that starts with that, you know it will take you somewhere in the User Guide itself.

- **Return to Navigation Page Button** - Each page after the User Guide's Navigation Page will have a blue button in the bottom right-hand corner of the page that says "Return to Navigation", which can be seen in Figure 5. This provides a quick and easy way to move throughout the document without scrolling.
  - These buttons are manually placed on each page of the User Guide following the Navigation Page.
  - If a new page is added to the User Guide, the Return to Navigation Button can be copied from another page and placed on to the new page.

Figure 5: Example of a Navigation Button

Evacuation Annex // User Guide// July 2014   Return to Navigation   UG-6
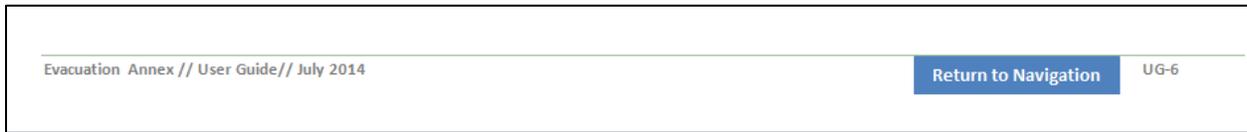
C. Additional Resources

Forums

Forums to help with Microsoft Word questions include:

- Office Word Forum I
- Office Word Forum 2
- Office Word Forum 3

Office Product Instruction

Tutorials include the following:

- Office Product Instruction

Videos

Video tutorials that will help explain effective ways to use Word include:

- Heading Formatting and Table of Contents
- Formatting Tables – Table Properties
- Section Breaks

D. Troubleshooting

When problems occur in the document, try using the "Check for Issues" function located under the file tab. Scroll over and click on the button to select the "Inspect Document" option. Here is a link that explains how to do that.

IV. Web Posting – Critical Information for State EMD Staff

Uploading to the State EMD Website

- **Keep the Name.** Please use the name of the document in column 2 of Table 2 when uploading to the State Emergency Management Division website because each of the documents link to other Plans and Annexes. For example, the Coordination Plan has a link to every one of the Annexes and Toolkits. All the Annexes and Toolkits link to the Coordination Plan.

- **Problems with Name Changes.** If the name of a document were to change from "Coordination Plan" to "Coordination Plan September 2015" the links to the Coordination Plan from other documents would break. When linking to the Coordination Plan in the Toolkits and Annexes, this web address is used: http://www.emd.wa.gov/plans/documents/CoordinationPlan.pdf.

- **Linking to the Plan, Annexes or Toolkits.** When linking to a document other than the Coordination Plan, you can replace the highlighted words "CoordinationPlan" in the web address with the name of the Annex or Toolkit with how it is written in column 2 of Table 2 below.

As the State EMD Web Administrator, you are the final check in making sure that the name of each document uploaded to the website is the one in the second column of Table 2: List of Naming Conventions.

Table 2: List of Naming Conventions for Planning Documents

Plan/Annex/Toolkit	Name of Document	Web Address
Regional Coordination Plan	CoordinationPlan	http://www.emd.wa.gov/plans/documents/CoordinationPlan.pdf
Regional Evacuation Annex	EvacuationAnnex	http://www.emd.wa.gov/plans/documents/EvacuationAnnex.pdf
Regional Medical Surge Support Tool	MedicalSurgeSupportTool	http://www.emd.wa.gov/plans/documents/MedicalSurgeSupportTool.xls
Regional Pre-Hospital, Emergency Triage and Treatment Annex	PreHospitalEmergencyTriageTreatmentAnnex	http://www.emd.wa.gov/plans/documents/PreHospitalEmergencyTriageTreatmentAnnex.pdf
Regional Resource Management and Logistics Toolkit	ResourceManagementLogisticsToolkit	http://www.emd.wa.gov/plans/documents/ResourceManagementLogisticsToolkit.pdf
Regional Sheltering Annex	ShelteringAnnex	http://www.emd.wa.gov/plans/documents/ShelteringAnnex.pdf
Regional Structural Collapse Rescue Annex	StructuralCollapseRescueAnnex	http://www.emd.wa.gov/plans/documents/StructrualCollapseRescueAnnex.pdf
Regional Transportation Recovery Annex	TransportationRecoveryAnnex	http://www.emd.wa.gov/plans/documents/TransportationRecoveryAnnex.pdf

Plan/Annex/Toolkit	Name of Document	Web Address
Regional Victim Information and Family Assistance Annex	VictimInformationFamilyAssistanceAnnex	http://www.emd.wa.gov/plans/documents/VictimInformationFamilyAssistanceAnnex.pdf
Regional Volunteer and Donations Management Toolkit	VolunteerDonationsManagementToolkit	http://www.emd.wa.gov/plans/documents/VolunteerDonationsManagementToolkit.pdf