Producing an accessible HREiR Award action plan

A manual for converting the action plan template into an accessible document

Introduction

As part of [institutional renewal of the HR Excellence in Research (HREiR) Award UK process](#), Award holders develop an action plan for the coming three years using a grid-like template[1]. Whilst plotting actions, success measures and other information in the grid aids in mapping to the obligations of the 2019 Researcher Development Concordat, it is not accessible in this format for all users. To support institutions in migrating the contents of their existing action plans to a more accessible version in MS Word for the benefit of all research stakeholders (and to comply with UK government regulations around accessibility), Vitae has developed the following protocol and files for your use.

Important: Institutions should note that generating an accessible document from the action plan template is not a requirement of renewing the HREiR Award, and institutions should still provide the three documents as indicated on the [Vitae website](#).

Expected time commitment:

1. Preparing files — 5 min
2. Save a 'master' copy — <1 min
3. Develop an action plan using the MS Excel file — 20-30 min
4. Migrating the contents of the action plan to the MS Word file — <5 min
5. Format the MS Word document as desired — As long as preferred

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1. Preparing files

The MS Excel file containing the HREiR Award action plan template contains 'macros', which allow the contents of specific cells to be migrated to a linked MS Word file automatically. You will need to change a few settings in each file to ensure that this linkage can occur.

1.1. Download the 'HREiR Award accessible action plan' folder from the [Vitae website](#); when unzipped, the folder will have the following contents (screenshot below shows files as they appear using Windows Explorer):

Name	Type	Size
HREiR-accessible-action-plan-document_linked	Microsoft Word Document	109 KB
HREiR-action-plan-template-for-ResDevConcordat_March 22 Templ...	Microsoft Excel Macro-Enabled ...	86 KB
READ FIRST_Manual_Producing a more accessible HREiR action plan	Adobe Acrobat Document	264 KB

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[1] File name 'HREiR-action-plan-template-for-ResDevConcordat_March 22 v2.0 Templates-Guidance-Tips.xlsm'

1.2. Save these **locally** on your computer - i.e., saved on the hard drive, and <u>not</u> on a cloud or server like OneDrive or SharePoint

1.3. To authorize the MS Excel file for use and enable its macros for migrating content:

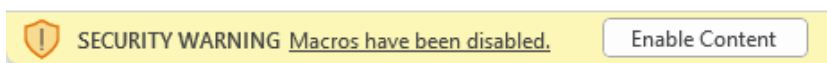 1.3.1. In the file explorer, right click the MS Excel file and select 'Properties'

 1.3.2. Select 'General' tab

 1.3.3. Under 'Security', at the bottom of the tab, select 'Unblock' next to the following message:
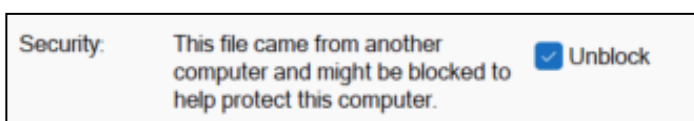
 1.3.4. Open the MS Excel file

 1.3.5. Once open, if prompted, select 'Enable Content' for the following message:
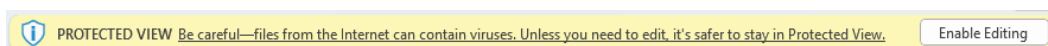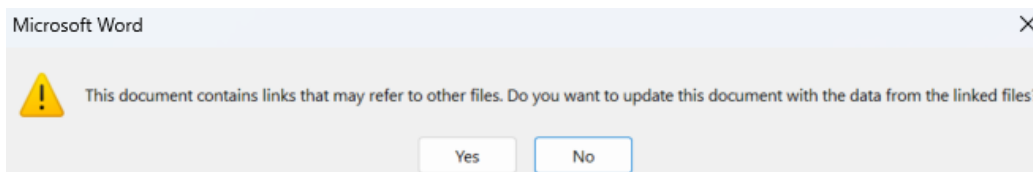

 1.3.6. Keep the MS Excel file open

1.4. To render the MS Word file as a 'trusted document':

 1.4.1. Open the MS Word file

 1.4.2. Once open, if prompted, select 'Enable Editing' for the following message:

 1.4.3. When the following prompt appears, select 'Yes'

 1.4.4. Wait whilst the document initialises (this should only take a few moments)

 1.4.5. Under 'File', select 'Options', then select the 'Trust Centre' tab and click 'Trust Centre Settings'

 1.4.6. Select the 'Trusted Locations' tab and click 'Add new location'

1.4.7.   In the new window that appears, select 'Browse', select the folder in which the MS Excel and Word files are currently stored, then click 'OK'; this folder should now appear in the list of Trusted Locations

1.4.8.   Click 'OK' to close the 'Trusted Locations' window and then click 'OK' on the next window to close 'Options'

1.4.9.   Save and then close the MS Word file

2. Save a 'master' copy

2.1. You have now:

2.1.1.   Authorised the macros within the MS Excel file in which to develop your action plan

2.1.2.   Created a 'linked' MS Word document that will receive the contents of your MS Excel action plan template automatically

2.2. It is strongly advised to copy the folder containing both files to produce a 'master' copy, as this will avoid having to re-download the folder and prepare the files as indicated in steps **1.1-1.4.9** if you need to restart for any reason.

3. Develop an action plan using the MS Excel file

3.1. **Important**: Do not add, remove or move any cells, rows or columns in the MS Excel file. All macros have been designed to correspond to specific cells in the MS Excel file, and making any structural changes will invalidate them.

3.2. Enter information into the MS Excel file's action plan template. You may paste text into the cells, such as from an existing action plan document.

3.3. You may add information to either/both of the '*Template for institutions*' and '*Template for funders*' tabs as these will both be migrated over to the MS Word file.

4. Migrating the contents of the action plan to the MS Word file

4.1. When you have finished adding entries to the MS Excel file, please open the MS Word file

4.2. When the following prompt appears, select 'Yes'
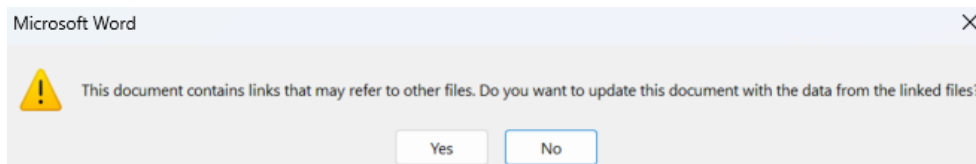
4.3. Wait whilst the document initialises - this may take a few minutes as the contents of the action plan migrate over to the MS Word document

4.3.1. **Tip**: the MS Word file updates each time a change is made to the MS Excel file. It is, therefore, more practical to make multiple changes in the MS Excel file without the MS Word file open, so as to only update the MS Word file once upon opening it.

4.3.2. **Tip**: If MS Excel provides a prompts that the file is 'Read only', try closing both the MS Excel and MS Word files and then re-open MS Excel again.

5. Format the MS Word document as desired

5.1. You may now develop the resulting MS Word version of the action plan to meet your accessibility requirements

5.2. This document is not peer reviewed as part of the HREiR Award renewal process, and you may therefore restructure the document, edit and format the text, and introduce institutional branding if preferred

5.3. **Important:** Please ensure that you still publish your action plan using the 2022 grid-style template alongside any accessible version (see below for a screenshot of the 2022 action plan template).