



Advanced Tips for Creating MS Word Templates

Comm4Dev gathering

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Contents

1. Most Important Word Features/Settings for Templates	1
1.1. Home Tab	1
Existing Styles to Set	1
Styles to Create	1
1.2. Insert Tab	1
1.3. Page Layout Tab.....	2
1.4. References Tab.....	2
1.5. View Tab.....	2
1.6. Format Tab.....	2
2. Tips for Creating Your Templates.....	3
2.1. Preplanning	3
2.2. Design and Style	3
General Tips	3
Fonts	3
Colors and Shapes.....	3
2.3. Spacing, Sizing, and Other Style Settings	4
Page Set-Up	4
Spacing.....	4
Font.....	5
3. 10 Steps for Creating Templates in Word.....	6

1. Most Important Word Features/Settings for Templates

Start by changing the Word Options to meet your needs.

1.1. Home Tab

- **Font pop-out:** On the Advanced tab, make sure all the character spacing is set to “normal” or 100% with no kerning.
- **Paragraph pop-out:** Individual styles have different settings, but you’ll use this pop-out to change spacing and indentation as needed.
- **Styles:** See individual styles below.

Existing Styles to Set

- | | | |
|-------------------------|-------------|------------------|
| – Normal (always first) | – Heading 1 | – Hyperlink |
| – Emphasis | – Heading 2 | – Intense quote |
| – Endnote text | – Heading 3 | – List paragraph |
| – Footer | – Heading 4 | – Title |
| – Footnote text | – Heading 5 | – TOC heading |
| – Header | | |

Styles to Create

- | | | |
|--------------------------|-----------------|-------------------|
| – Abbreviations list | – Photo caption | – Text box title |
| – Appendix sub-heading 1 | – Table title | – Text box text |
| – Appendix sub-heading 2 | – Table text | – TOC sub-heading |
| – Figure title | – Table heading | |

1.2. Insert Tab

- **Table drop-down:** Insert a custom table instead of pre-formatted table to fit project/organization style.
- **Pictures:** Under File > Options > Advanced, set “Insert/past pictures as” to “Tight”.
- **Shapes, SmartArt, and Chart:** Play around with them; chose unique shapes and styles that fit your organization/project’s brand. Just remember not to choose something impractical and unprofessional, like a smiley face for a text box.
- **Header and Footer drop-downs:** Create your own using the “Edit header” and “Edit footer” functions. Also use this function to have multiple different headers, footers, and page numbers throughout your document. Tip: You can open the header or footer sections of the document by double clicking on that part of the page.
- **Page numbers:** Bottom of the page and to the right or center is best. Don’t choose a crazy or fancy design, unless it well fits into your organization/project’s style.
- **Text Box drop-down:** Draw your own text box from scratch or choose a shape as your text box.

1.3. Page Layout Tab

- **Page Setup pop-out:** If you didn't set your margins and page size when you opened a new file, you can update the settings here. Or if you need to switch back and forth between page orientations or sizes, you can do that here, too. Don't change page orientation with the drop-down!
- **Breaks drop-down:** Get used to using this drop-down for all your break needs, such as page breaks (to push text onto the next page without changing sections or formatting), column breaks (to push text into the next column, if you have two or more columns), and next page (also known as section breaks, and what you'll need if you want different formatting, page numbers, or headers/footers on different pages).
- **Paragraph pop-out:** Just a different way to get to there than the Home tab.

1.4. References Tab

- **Table of Contents drop-down:** Add a custom table of contents, rather than a pre-formatted one, to have more control over formatting/look and what gets added.
- **Insert Footnote (or Endnote):** Give examples in your template of what footnotes or endnotes could look like. Which you use depends on the document.

1.5. View Tab

- **Print Layout:** This is the best view for setting up your template.

1.6. Format Tab

(pops up when you click on figures, photos, and text boxes)

- **Position drop-down:** Set the text wrapping around the element.
- **Wrap Text drop-down:** Set the position of the element relative to the page, other elements, and text.
- **Border:** You don't always need one, especially if your elements are colored, but if you want a little extra pop of color/style or your organization/project style uses borders, here's where you would set them.
- **Size, Height, and Width:** This adjusts the sizing of the element.

2. Tips for Creating Your Templates

For the most part, these standards apply to documents where space isn't an issue (e.g., a training manual versus a proposal).

2.1. Preplanning

- Determine the context and audience: Do you have unlimited space or is there a maximum number of pages you want to/can use? Where is your audience located? Will your audience have the bandwidth to read lots of text or will text boxes/figures/tables be more useful?
- If possible, create the template in the oldest form of Word you expect your audience to use (likely for us 2010 or potentially 2007 for field staff); if not, be prepared for items, like text boxes, to shift and for colors to change.
- Know your organization's preferences for fonts, colors, and design.

2.2. Design and Style

General Tips

- Designing your template is more about proportions than absolute numbers.
- Base styles off of one another so that if you need to change them, you only need to change the base style.
- Find a good balance between usability and creativity/appeal.
- Include template specs in your project or organization's style guide and in a table at the end of template (especially so you can easily share RGB specs for your colors).

Fonts

- Choose different fonts for headings and text.
- In very large documents or donor reports, number the headings and sub-headings for easier reading.
- Unless your organization or project has its own standards, stick with “universal fonts” (Arial, Calibri, Cambria, Courier New, Garamond, Gill Sans MT, Tahoma, Times New Roman, Verdana).
- Play with font sizes AND color shades to show differences between heading levels and between regular and highlighted text. Move from larger to small font and darker to lighter color shades as heading levels get lower, and try bolder, larger, colored text for highlighted words/phrases.

Colors and Shapes

- Play with the different shapes of text boxes and figures. Standard rectangles and bar charts are boring; use a new and unique shape for more visual interest.

- If you will likely print in grey scale as opposed to in color, use blues or purples instead of black/grey.
- Don't color in large sections, like an entire text box or figure, with very dark colors; it's expensive and difficult for field staff to print.

2.3. Spacing, Sizing, and Other Style Settings

Page Set-Up

- Standard margins for letter paper are 1 inch with a 0.5 inch header and footer, and in A4 they're 2.5 cm (0.98 inches) with a 1.25 cm header and footer (0.49 inches). Do not set your margins less than 0.25 inches or you'll cut off any text or elements and your document likely won't print.
- Use section breaks ("Next Page") in between pages of different types, like the cover page, the table of contents, and the introduction, so you can change numbering schemes and headers/footers.

Spacing

- Use spacing after paragraphs to separate paragraphs, bullets, and other elements. Do not insert extra lines after each paragraph; this takes up a lot of extra, unnecessary space and can cause unnatural breaks in the document flow. The best ranges of spacing are:
 - 8–12 pts after paragraph text; 10 is ideal, and down to 4 pt can be used if you have space limitations
 - 0–6 pts for bulleted and numbered lists, depending on how long each point is
 - 8–12 pts after most headings (generally match the paragraph text) and sometimes 10–18 points before headings to help show division between sections
- For headings and any table, text box, or figure titles, in the "Line and Page Breaks" tab in the "Paragraph" field, make sure to click "keep with next" and "keep lines together."
- Line spacing for documents in MS Word 2010 or older should be multiple 1.05 pt. In 2013 or later versions, MS Word takes care of that extra spacing, so you can use single space.
- If you use a uniquely shaped text box or figure, you might need to set the left and right line indentations to less than 0.00". Indentations of -0.05" or -0.10" work well.
- Line up bullet points along the left margin, rather than letting them naturally indent 0.5 inches.
- Unless you need to cram more text into a smaller space, don't use justified alignment. It's harder to read and the spacing looks awful. Use left alignment as standard.
- Never indent the first line in a paragraph or put 2 spaces between sentences; aligned to the left margin and 1 space are the new standards.

Font

- Each font has its own standard sizing (typically 10–12 pt).
 - Arial: 10 pt
 - Calibri: 11 pt
 - Cambria: 12 pt
 - Courier New: 12 pt
 - Garamond: 12 pt
 - Gill Sans MT: 11 pt
 - Tahoma: 10 pt
 - Times New Roman: 12 pt
 - Verdana: 10 pt
- For normal text, use the standard size for the font, but if you're creating training materials or documents for people with low literacy levels, use one pt larger than standard.
- The size of text in tables, text boxes, figures, and footnotes should be 1 pt smaller than normal. Text in footers and photo captions should be 2 pts smaller, and in headers 3 pts smaller.

3. 10 Steps for Creating Templates in Word

1. Determine your template needs, audience, and Office version.
2. Create the file with the appropriate page settings: paper size, margins, header and footer, paper orientation.
3. Set your styles: always Normal first, then the rest of the styles listed Sections 1.6 and 1.7; generally ignore everything else.
4. Design appropriate custom covers, giving staff options.
5. Add an inside-front cover with a standard organization/project description, any disclaimers necessary, a suggested citation, and contact information. Sometimes logos are placed in the inside-front cover instead of on the cover. If you'll have a super long document with a flashy or extra colorful cover, sometimes a title page between the cover and the inside-front cover is a nice addition to help keep printing costs low for those in the field that don't want to incur ink costs to print the flashier cover.
6. Insert the "guts" of the document: pages for table of contents, abbreviations and acronyms, acknowledgements, foreword/preface, executive summary, and appendices, along with the main pages of the document that will show all the styles available in the document, including sample tables, figures, and text boxes.
7. Make sure each grouping of page types is in its own section (use the "Next Page"/section break). You do this step while creating each page type, not after creating all page types. Page type groupings are:
 - Cover page
 - Inside front cover + table of contents
 - Abbreviations and acronyms + acknowledgements + foreword/preface + executive summary
 - Main body text + appendices
8. Ensure your template meets all branding and style requirements for your organization, your project, and/or the donor.
9. Insert directions on how to use the template, including how to tag styles, delete unwanted pages (especially covers), create figures and text boxes, and generate the table of contents.
10. Vet the template with colleagues, particularly those who will use the template as part of their regular work. Clarify or update anything based on feedback.