

Microsoft styles and templates save precious time

Each time you produce a business document, do you get the feeling that you're having to re-invent the wheel? And does the wheel end up looking different each time? And does your wheel start to drive like a supermarket trolley once you start copying and pasting from different places?

There is a way to save hours of wasted time and untold frustration, and that is to get into the habit of creating Word, Excel and PowerPoint templates.

The important thing to note is that a template is not a normal Word, Excel or PowerPoint document. It is a special type of file and has a different file extension. It sits in the background and all your documents are built on top of it.

Templates will streamline your document tasks and allow everyone in your organisation to prepare their documents on the same standardised template. A template with specially written styles will give consistency to the look and feel of all your documents, and match the corporate styles that may be in place in your organisation.

By creating individual templates you can pre-determine and standardise margins, colours, fonts – size and spacing, columns, table formats and so much more. You can even add macros and shortcut keys to help you with specialised actions in your template. Your finished document will be professional and visually appealing.

How does it all happen?

First of all you have to think how you want your document to look and who will be using the template. What margin parameters do you want for your pages - will you use one or more columns, do you want headers and footers, do you want to have pull quotes in text boxes in the margins?

List the various components and styles that will be used in the document, such as heading I, body text, table headings and text, figure and table captions, pull quotes etc. Work out what colours will be used - do they need to match your logo or corporate colour palette?

Whatever the elements are, plan it out so you know what you need to include before you begin creating the template. Although you can continue to tweak your template as required it's best to get as much of it right first up.

If you have information that is duplicated throughout your documents you can create and use macros that will help you easily carry out routine tasks.

Protecting your template

When you've created your template and it's ready to be shared with fellow users, it is prudent to password-protect it, or set editing restrictions, so that other people can't make changes to your good work. If and when you get some feedback that a style or page set up may need to be changed, you can make those changes to the master copy.

About Par Excellence

Par Excellence is a document design and production service in Victoria Park. From a simple flyer to a 1000-page report, we can help with graphic design, typesetting and formatting, proofreading, editing, printing and finishing. We are highly experienced in professional document design software, and we know how to wrangle MS Word!