# New Templates

This was created originally for creating Microsoft Office PowerPoint templates, but the Theming practice would apply well to Word (and Excel) document templates too. The reason for having to do this is that too many clients have templates created by designers who know how to make their document look good, but they do not always do this in harmony with the way that MS Office formatting is designed. This results in templates that ‘break’ the standard features of the applications.

### Before starting with any new templates

* Check client branding guidelines, for colour palettes, font recommendations, logo rules, etc
* Find any existing templates to identify client requirements, valuable content or document standards

# Things to consider

Layout widescreen or traditional 4:3

Keep the out of the box features, a.k.a. don’t break anything, especially in PowerPoint structures.

Spelling language

Graphics to include (see some sample templates above)

NB: MS Office 365 Online apps do not support traditional ??TX files. You need to create a regular ???X document and save it somewhere read only, so that people open that then click Save As

### Order of work

According to [Brandwares, the recommended order of working in PowerPoint template construction](http://www.brandwares.com/bestpractices/2017/01/powerpoint-construction-best-practices/) is:

Theme (Fonts, Colours, ), Master, Layout, Slides

### MS Colour Palette

Theme Colours in MS Office use the following elements in the palette.

*Text – Background x4: Dark ,1 Light 1, Dark 2, Light 2*

These give you two schemes of background and foreground, with 2nd being light on dark

*Accent x6 + hyperlink x2*

The accents are to contrast and differentiate infographics, but you should leave the hyperlinks as is to avoid confusing people. Accent 1 is sometimes used in a special way, whereas Accents 2-5 are used for multi-colour ‘smart art’.

### Client Colour Palette

Recommend keeping Black and White as they are. Consider colours the brand palette to use as second scheme. These may be used as backgrounds, but you might find the names Dark and Light counter-intuitive when you start testing your Custom Color Scheme.

To help choose other colours to use as accents, get data on the colours in the brand palette. For instance if the brand palette gives the RGB values, add Hue Saturation Luminance (HSL) values. I chose HSL, based on the RGB colour wheel, as the documents are more likely to be screen-viewed than printed.

Warnings:

* there may be inconsistencies between the brand guide’s conversion between Pantone, CMYK and RGB, so focus on RGB
* MS Office’s conversion to ‘HSL’ may differ from other methods. Perhaps they based it on a RYB wheel?
* When MS Office generates the Tints (mixed with white) and Shades (mixed with black) in the Color Picker, some colours don’t mix well – you have little choice on your brand colours, but consider changing your accent colours if they mix badly.

Tips:

* Look to use high saturation colours for Accents, if you can.
* Use colour wheel techniques to find a harmonious palette. The Hue degress is a good starting point for Compliments, Adjacents, etc.
* Once you are happy the range of hues work together, try to adjust the Lightness for a good balance. Accents are used in infographics like spreadsheet charts so consider alternating lighter and darker.
* Be mindful of the overall ‘tone’ of your palette, and how this sits with brand colours you have been given.
* Produce a table including any intermediate conversions, like HSL, but include the RGB values and assign them to MS Palette colour titles (Dark 2, Accent 3 etc)
* Although you do not want to radically clash with Hyperlink colours, you might not find it worthwhile changing these.

### Styling Notes

Some non-designer tend to use the brand colour all over the place, e.g. for every single Heading. You may choose to be more sparing, as overusing a colour diminishes it’s value. Bold and grey is a classic way to emphasise without being gaudy. If some client staff want to ga gaudy, you can set up a style to suit their ‘taste’ as well as a more aesthetically balanced style.

### Steps to Create new template

* Create a New presentation using the default Blank template.
* Menu / File / Save as / This PC / drop down the type \*.pptx – PowerPoint Template (\*.p**o**tx)
  + Now you can save as you go, e.g. after hard work things like entering the colours
* Menu / Design / Variants / Colors / Customize Colors…
  + Set the colours as above
* Menu / Save as Custom name: Client Brand YYYY MM
* Fonts
  + Heading: Arial Bold
  + Body: Tahoma
* Menu / Design / Themes / dropdown / Save Current Theme
  + Client YYYY theme
* Menu / Design / Themes / dropdown / Custom / select the newly saved Theme
* Menu / View / Master Views / Slide Master
* Menu / Slide Master / Size / Slide Size / Standard 4:3
* Scroll up to click onto the overall Master slide, not a layout
* Insert the logo bottom right hand
* We want a Title background that doesn’t cover the whole page, so it can’t be a PowerPoint background
  + On the main Title layout …
  + Insert Rectangle and size to fit top and sides of page
  + Colour from palette
  + Sent to back
  + Copy this to section header and make 60% transparent
* Set Proofing Language on Slide Master
  + In the Thumbnails Pane, the navigation bar on the left, move to the Slide Master
    - This is the one at the very top with the number 1 next to it
  + Click on the slide in the main view
  + Menu / Home / Editing / Select / Select All
  + Menu / Review
* Set Proofing Language on all Layouts
  + This repeats the steps above, but the mouse clicks can be tedious so use keyboard shortcuts – the shortcut letters below are for English menus, please adjust for your interface language
  + press F6 until the main Slide Pane is highlighted (dotted line around the pane)
  + press Page Up until you are on Slide master
  + Repeat the following for each Layout page in the master
    - Page Down to display next Layout
    - Ctrl A to Select All boxes
    - ALT R U L to set proofing language
    - Down arrow to select English UK (or whichever you want)
    - Enter to choose that language
    - repeat
* Ensure footers position and formatting is correct in all Layout pages
  + If not, move to each layout page and uncheck and recheck Master Layout / Footers
* Menu / Uncheck Master Layout / Footers from both section heading layouts
* Menu / Slide Master / Close Master View
* Menu / View / Master Views / Notes Master
  + Repeat steps above to set proofing language
* Menu / Notes Master / Close Master View
* Menu / Insert / Text / Slide Number / Tick Date and Number but not Footer – Apply All
* Menu / Design / Themes / dropdown / Custom / choose your custom theme
  + This ensures it is selected for all pages
* Save your template
* Close

### Test

* In Windows File manager browse to the template and double-click to begin a New presentation
* Make sure it functions as you’d expect
* Insert some new pages
* Choose different layouts for each including section headers
* Make sure page numbers appear as expected
* Insert some text, using multiple levels with tabs
* Add in enough lines to make sure it auto fits to placeholder
* Add in some smart graphics and tables, and make sure the colour combinations work for you

### How to improve

Create alternative Masters, calling the existing one ‘Fresh’, but also add ‘Fresh widescreen’ with logo working well at 16:9 and ‘Classic’ with the previous darker title page, and maybe other old layout elements for backwards compatibility. To make things easier for users, save the template three times, each with a different Master selected.

Add in a new Colour Theme for Client Corp 2018 using fully saturated colours from corp PPT

Check out step by step in <https://nutsandboltsspeedtraining.com/powerpoint-tutorials/custom-powerpoint-theme/> and <https://nutsandboltsspeedtraining.com/powerpoint-tutorials/create-powerpoint-template/>

See [VBA Macro alternative to manually setting proofing Language](https://gist.github.com/tdalon/4633be11ca2241c983fa1645400a22b1) on each Layout page (originally [KB245468](http://support.microsoft.com/default.aspx?scid=kb;en-us;245468)) se also <https://superuser.com/a/1119420>

Consider adding a couple of pages of ‘help’ text in your PPT to make sure people know the best way to make it look good

If you find people don’t stick to the Theming you have guided them towards, why not include a Style Guide off the side of your Slide Master to remind them when they are editing their deck – see [instructions to embed the Style Guide off the side of your master here](https://nutsandboltsspeedtraining.com/powerpoint-tutorials/powerpoint-best-practices-create-consistency-with-formatting-guides/).