

## Creating an MS Word Template

Going Through Microsoft to  
Create a Functional PDF  
*Presentation by Carl Young*



## Why Bother?

- Makes it easier to create an interactive PDF
- Reduces post-creation time and effort
- Uniform look to the published PDFs
- Makes documents Section 508 compliant
- Easier to repurpose tagged PDFs



## PDF Problems Created by Word Users Not Using Templates

- No links
- No bookmarks
- Web links that look valid but are not
- No Section 508 compliance
- Difficult to repurpose



## Other Benefits

- Save time
- Automate work, including table of contents creation
- Consistent formatting
- Running headers/footers
- Macros
- Using Word Styles gives a document a consistent look



## Worst Practices

- Ad hoc formatting using the formatting buttons
- Using the Painter icon
- Manually created tables of contents
- Fake tables
- Fake columns
- Fake cross references



## Best Practices

- Use Word styles
- Create your own styles
- Use Word's automation features
- Use section/page breaks
- Create your PDFs with the PDFMaker button/Adobe PDF menu



## What are Word Styles?

- Two basic flavors:
  - Character Styles
  - Paragraph Styles
- Character Styles
  - Control font, font size and font formatting characteristics
- Paragraph Styles
  - Includes character formatting, plus line spacing, margins, tabs and borders
- Also styles for lists and tables

## Character and Paragraph Styles

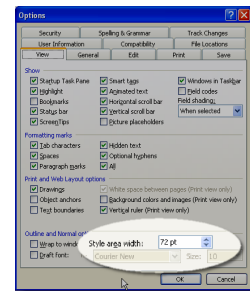
	Paragraph	Character
Font	X	X
Font Size	X	X
Font Appearance	X	X
Line Spacing	X	
Margins	X	
Tabs	X	
Borders	X	

## Previewing Styles

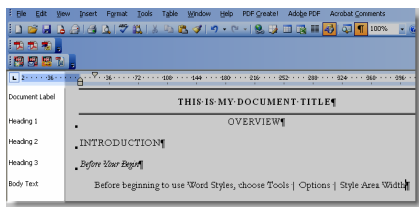
- Open a document
- Choose *Format | Styles and Formatting*  
Or
- Choose *Format | Theme | Style Gallery*

## Viewing Styles While You Work

- Choose *Tools | Options | Style Area Width*

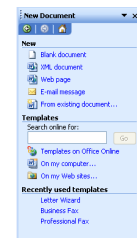


## Viewing Styles in Your Document



## Using a Template

- Choose *File | New ... From Template*
- Apply Styles to Create a Document
- Blank Document is based on Normal.dot
- Once you create a document it is independent from the template
- You can switch templates with *Tools | Templates and Add-ins*
  - Will not change existing formatting, but makes the styles in the new template available to the document



## Elements of Your Template

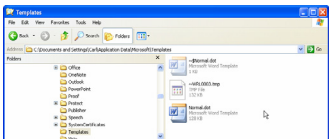
- Headers and footers
- Boilerplate text
- Layout elements, such as columns
- Paragraph Styles
- Character Styles
- Keyboard Shortcuts
- Sample text showing how to use the template

## Protect Normal.dot

- Word templates are based on Normal.dot
- You may want to make Normal.dot read-only while you create a template

## Steps to Protect Normal.dot

1. Select My Computer from your desktop or from the Windows start menu
2. Click on the drive containing your user settings (this is generally the C: drive)
3. Click on Documents and settings
4. Click on your user name
5. Open the Application data folder
6. Click on Microsoft
7. Open the templates folder
8. Right click on the file named Normal and select Properties
9. Under the Attributes: label, check the box beside Read-only
10. Click the Apply button, then click OK



## Create Your Template

- Open New Blank Document or an existing template
- Choose File | Save As ... | Document Template (\*.dot)

## Create Paragraph Styles

- Word styles can be linked
  - Microsoft calls this “cascading”
  - Confusing term because of cascading style sheets (\*.css) in html
  - Changing the parent style will roll the changes out to child styles
  - Can be 9 levels deep
- Unlinked styles are based on *No Style*
- Word templates always contain Headings 1 to 9 and Normal
  - You can name your own styles

## Steps to Create a Style

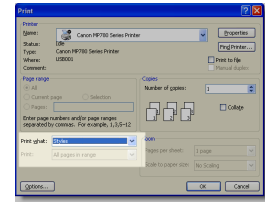
1. In the *Styles and Formatting* task pane, click the *New Style* button
2. In the New Style dialog box, type *My Style Name* in the Name text box
3. Choose your font under *Formatting*
4. Under *Formatting*, in the font size list, choose 10
5. Pick the kind of style (paragraph, character, table or list) and click *OK*

## Add Keyboard Shortcuts

1. Format | Styles and Formatting
2. In the Pick Formatting to Apply dialog box, choose the style you want to assign the shortcut to
3. Click Modify | Format | Shortcut Key | New Shortcut Key
4. Choose a shortcut not in use
  - Shortcuts typically begin with CTRL or ALT
5. Click Assign and Close
  - Tip: You can assign a shortcut to a special character

## Print Styles

- File | Print | What | Styles



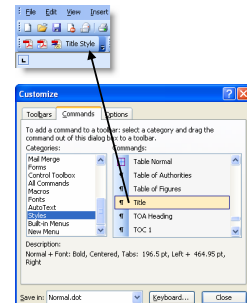
## Issues with Word Styles

- Auto Recovery may corrupt a Word file, your styles and Normal.dot
- Switching templates in your document may cause unpredictable results
- Word may create character styles linked to your paragraph styles with duplicate names
- Resolution
  - Redo template
  - Delete or rename styles
  - You may need to rename Normal.dot, close Word and restart to create a new Normal.dot
  - Turn off Automatic updating

## Customize Word's Toolbar

1. Choose Tools | Customize | Commands.
2. Choose Categories | Styles. Drag and drop a style onto a toolbar.

**Note:** Create your own toolbar by clicking the Toolbar tab and then clicking the New button. You can place frequently-used styles on this toolbar.



## Use Styles to Create a TOC

- Make sure you have applied styles to all major headings
- Click where you want the TOC to appear
- Choose Insert | Reference | Index and Tables | Table of Contents
- If your styles don't show up, click on Options
- Click OK

## Create an Interactive PDF

Now for the easy part!

1. Choose Adobe PDF | Change Conversion Settings
2. Click on Bookmarks and highlight the PDF bookmarks you want to appear
3. Check the other settings
4. Click OK and convert to PDF