My favourite software: using templates in Word

How many times have you seen someone struggling with a document to get the text and the headings all looking the same? Getting that font to be in Arial, 12 pt, bold, left justified, numbered ... Putting the heading numbers in carefully only to find that you need to add another section and it all needs renumbering. Getting bullet points all looking the same – why is it that one always seems bigger than the rest? Laboriously creating a contents page, and redoing it when that extra paragraph is needed. And what about those documents you receive and import into another file only to find that the fonts and paragraphs are in complete disarray? It’s enough to make you long for a typewriter with keys like sledgehammers and a choice of Courier or Courier.

Just look round your office. How many hundreds of hours are wasted doing all that formatting?

But there’s a simple solution. Word is a very sophisticated program and wants to help you do things once not umpteen times. So it has templates. Templates allow you to set the style of headings and text, numbering and bullets, margins and paragraph spacing, and more – once, and only once. Not that that means you can’t change things – you decide that Heading 2 needs to be underlined rather than in bold or you want 9 pt spacing between paragraphs, not 6 pt? Change it via Format/Style and every Heading 2 or paragraph spacing will change. Templates can be saved and offered to you (and the rest of the team) when you start a new document. Within a Word template there are a set of headings – 1, 2, 3, 4 ... These can be formatted in whatever way suits your purpose, enabling you to move sections around faster, renumber automatically, create a table of contents in seconds.

There’s another quick way of changing the style. Ever noticed that little brush in the standard toolbar? It’s called Format Painter. Put the cursor in the line of formatting you want to copy. Click Format Painter, and then select the text where you want to apply the formatting. Hey presto!

Neither of us has had any formal training in using templates. We both discovered it almost by chance. One of us was doing some writing for another organization, they sent their template to put all the text into. We have plagiarized it for our own use.

The other stimulus was discovering an oft-ignored little button at the bottom left-hand corner of the screen. Hover the cursor over it and you will find ‘Outline View’. Using outline view allows you to:

- see if the structure of the document is consistent;
- view or print just the headings – an overview of your report;
- move around large documents much faster;
- move sections quickly and easily by drag and drop;
- and more ...

We can recommend a little self-help guide that someone (well, OK, one of the authors) wrote called Working in Outline. Search for it on http://www.sepho.org.uk/ Use it and you can award yourself at least 1 CPD point for self directed learning.

Use of standard templates provides a small organizational quality check. When you receive a Word file from another organization just put your cursor into a heading or a bullet list and see if there is an appropriate entry in the style box on the left side of the tool bar. If it is appropriate and if you then click the down arrow on the style box and find an orderly and common-sense list of styles then you can award that organization three stars (and plagiarize the styles as we did). The organizations we have worked for in the past didn’t seem to recognize its importance and we know of many that are still not using it. (Our own organization can’t yet claim those three stars.)

In future we all must write using templates. When writing a document for an intranet or the internet (and who isn’t nowadays?) then it is essential to use a template so that it can easily convert to XML and HTML. If you don’t, the words you write could be lost forever to the web.

But just as we are getting used to structuring our documents in this way, our specialist registrar tells us that Word is a bit creaky, and we should be using something more sophisticated. Thanks Harry, but we’ll stick with Word for now, and maybe we’ll organize a bit more training in its use.

Alison Hill
Director
Kate Saffin
Senior Researcher
Public Health Resource Unit, Institute of Health Sciences, Old Road, Oxford OX3 7LF
E-mail: alison.hill@phru.anglox.nhs.uk

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