

# Template Design Guidelines

How to design layouts for templates



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## Managing expectations

Always allow for testing when it comes to templates - there are many different ways to implement templates, there can be many technical issues, and users may suggest sensible changes.

All of these issues can be readily resolved, but only if a testing stage is built into the template roll-out schedule.

## Platform and application

It is important to establish what operating system and what application version will be used with the templates - is it Windows 10, Windows 11, or Mac OS, and is it Office 2021, Office 365, etc.?

## Design guidelines

Office programmes like Word are not designed to be used for professional publishing and as such, they have many limitations.

Whilst many of these can be worked around, it is worth knowing what is possible, what is difficult to achieve, and what cannot be realised when creating a design for a template.

Here are a few rules and tips.

## Layout

Remember to allow generous margins when designing a page - most inkjet printers need a large margin along at least one edge (often along the bottom) - and even modern laser printers will often require reasonable margins all round.

Having images bleed off the page is usually not possible on desktop printers.

A page margin of 13mm is usually safe on most printers.

If you are in doubt, make sure you check that the design will print correctly on all the printers that might be printing the documents.

An overall background image on a template will increase the file size of all documents created with the template.

If a document's file size is too large, it may be difficult to send it attached to an email, and over time, it may take up too much storage space on a hard drive or server.

## Fonts

Logos and any fixed large type can be embedded as graphics in the template and therefore do not need to be installed on the template users' computers.

On the other hand, any small type, or type that users will be entering themselves, will have to be in a typeface that is available to them.

This may require installing a font or set of fonts at the same time as the templates.

Any fonts installed should be legally bought and licensed.

Embedding fonts in Office applications depends on the font's licensing settings. Not just any font can be embedded, and this is an area fraught with complications, so do get in touch if you are looking to embed fonts in a template.

## Word Guidelines

### Font sizes

Do not use fractional point sizes. Word only accepts increments of half a point, so when specifying the size of the type, do so to the nearest half-point size—i.e., you can use 8.5pt but not 8.25pt. (You can specify leading to the nearest tenth of a point, though.)

### Margins

Margins are specified from the top of the page to the ascenders of the type and from the bottom of the page to the descenders of the type - not to the baseline of the line.

### Rules

In Word, line rules for borders are measured in points (about one-third of a millimetre) and are only available in the following sizes: 0.25, 0.5, 0.75, 1, 1.5, 2.25, 3, 4.5 and 6 pts.

Dotted or dashed rules are extremely limited and may have to be reproduced as a graphic (making the files bigger) if a particular style is required.

## **Colour**

Word's handling of colour is fairly basic, so keep any use of colour simple.

## **Usability**

Remember that Word is not an advanced publishing programme. Although multi-column layouts, complex pages or overlapping type can be created in Word, it may be difficult, or even impossible to produce a matching template that is easy for the average Word user to use.

## **Expectations**

Keep your expectations of what can be achieved low, but do not be afraid to ask if something is possible — you may be surprised!

## **PowerPoint Guidelines**

### **Layout size**

The single most important item to get right in PowerPoint is the proportions of the "page." If the slides are being projected, turned into OHPs, viewed on-screen, or printed out, they must have a matching ratio of width to height. For example, traditional slides are 3:2. Widescreen TVs tend to be 16:9 (but this can vary).

### **Colour**

Remember that colour matching is always going to be an issue with screen presentations. You cannot guarantee colour to any degree of accuracy.

### **Copy**

Slides should be brief and to the point. Remember that the presenter is the real star, and the slides are there to illustrate particular points.

Too much information on a slide and the audience is reading the slide instead of listening to the presenter.

Graphs should illustrate a single point clearly - if you want to make two points with the same data - create two slides, each one highlighting a different point.

## **Free Template Design Advice**

If you're designing a template and want to be sure that your design will be faithfully realized, please get in touch. We'd be happy to help.

**Call us on 07860 267155**  
**or email [keith@knightstemplate.co.uk](mailto:keith@knightstemplate.co.uk)**