

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-in to the template roll-out schedule.

Platform and application

It is important to establish what the operating system is and what application and version is going to be used with the templates - is it Windows 2000, Windows XP, Vista, Mac OS - is it Word 2001, Word 2003, PowerPoint 2003, etc.

Design guidelines

Office programmes like Word, which are in use in organisations throughout the world 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 when you are creating a design for a template; what is possible, what is difficult to achieve, and what cannot be realised.

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 any doubt, make sure you check 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 big, it may make it difficult to send it attached to an email, or over time, documents 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 user's 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.

The same font family from the same font foundry may be named differently on different operating systems - so if templates are needed for more than one operating system - say Windows and Mac OS X, then you may need more than one set of templates.

Word Guidelines

Font sizes

Do not use fractional point sizes - Word only accepts increments of half a point, so when specifying the size of 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 it is being projected, turned into OHPs, viewed on screen or printed out, it is important that the slides have a matching ratio of width to height. For example, traditional slides are in the ratio 3:2.

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 kept 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 realised – please get in touch – we'd be happy to help.

Call us on: 07860 267155 or 01923 893501