Digital Tip in Action: Creating Styles and Templates

[00:00] By taking advantage of Word's style and template functionality, you can set up a system in which the software automatically formats different document elements, like headings, paragraphs, and lists. This will save you time when creating your document, and can help you generate a table of contents, as well as a template for future documents. This tutorial will briefly explore and demonstrate four different elements: heading styles, list styles, tables of contents, and templates.

[00:30] Let's get started. Creating heading styles throughout your document allows you to automate the size, style, and font for each level of heading. First, format one instance of each heading level. Here, we'll format all first-level headings as 18-point Helvetica boldface and all second-level headings as 14-point Helvetica boldface. Now we'll save each of those settings as a style.

[01:00] Highlight one of your formatted headings, and in your Styles toolbar or ribbon, click New Style. Name this heading. Here, we'll use "Heading A." Now we see that Heading A is an available style in this document. Continue to do this for all heading levels, as we do here with Heading B. Each style you create will appear in the Styles toolbar or ribbon.

[01:30] Once you've set your styles, go through the document and match each element to the appropriate style. If you created an outline before you began writing, it can be a useful guide for matching element levels. If you'll later choose to modify the settings of a particular style, the rest of the headings assigned to that style will change automatically. Here, when we change the Heading A style to the American Typewriter typeface, we see all Heading A elements

[02:00] change to our new font. This is not unlike the principles of automatic formatting at work with lists. If you style a bulleted list in your document and then proceed to create another bulleted list, Word will automatically follow the format you specified earlier.

[02:30] Let's return to the start of our document. Once you've used Styles to mark all of the headings in your document, you can use Word's Table of Contents function to automatically generate a table of contents. Position the cursor where you want your table of contents to appear. Choose Insert and Index and Tables.

[03:00] Click the Table of Contents tab. Select a format, and click OK. Word would then insert a table of contents that you could edit as needed. You can also use the styles you've set to create a template, a document that can save you time when creating a similar document in the future. To create a template, save your document with a different file name. Here, we'll use "My Template." Then,

[03:30] remove all of the content in your document by selecting all and deleting it. Now we'll re-save this version as a template. Choose File, Save As, and in the Format drop-down menu, choose Word Template. This will automatically change the location of your saved file to a system folder called My Templates. The next time you create a similar document, this template will help you start writing right away, ready with all of your created styles.