

VERSION 1.3

2022.08.28



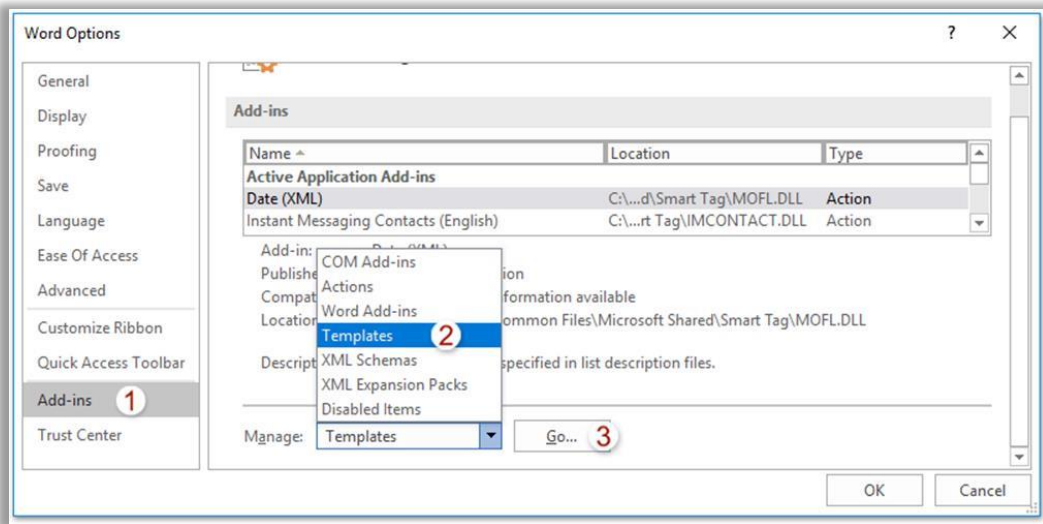
APPLYING A NEW TEMPLATE TO AN EXISTING DOCUMENT

COURTESY OF PHARMASUG ACADEMIC TEAM

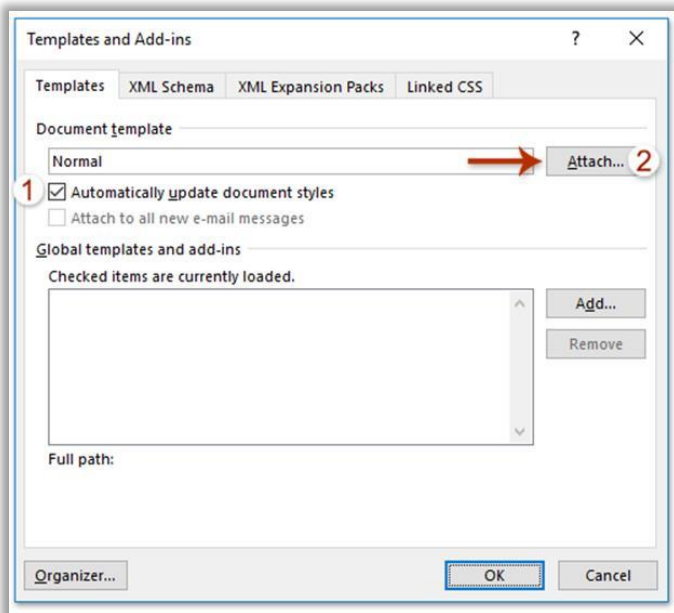
APPLYING A NEW TEMPLATE TO AN EXISTING DOCUMENT

MICROSOFT WORD WALKTHROUGH

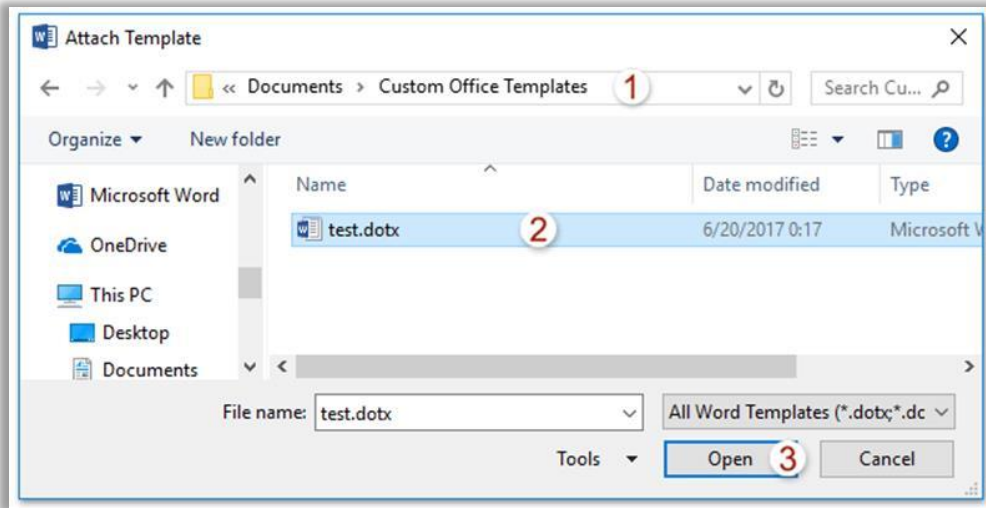
1. Open the Word document you would like to apply the template to, then click **File > Options** to open the Word Options dialog box.
2. In the Word Options dialog box, (1) click **Add-ins** in the left bar, (2) select **Templates** from the **Manage** drop down list, and (3) click **Go**.



3. A new dialog box should appear for Templates and Add-ins. Check the “**Automatically update document**” styles option and click the **Attach** button.



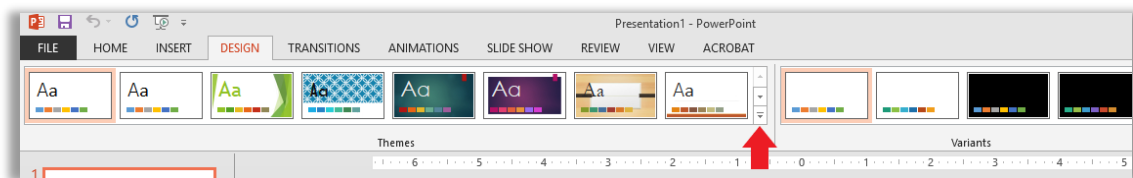
4. A new dialog box should appear for Attach Template. In this new box, (1) open the folder containing the new template to be applied, (2) select the new template, and (3) click the **Open** button.



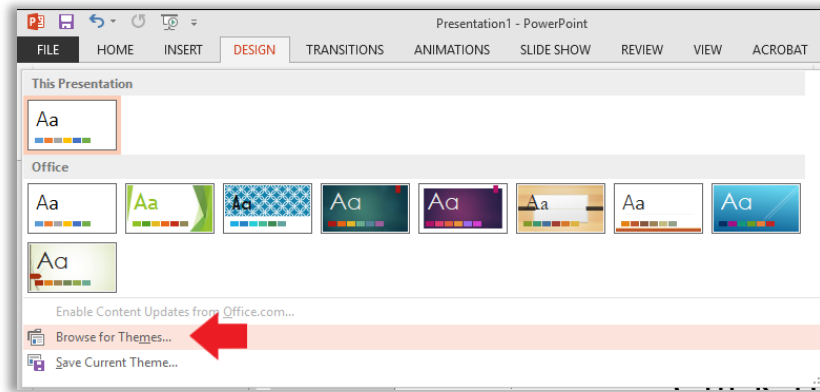
5. Click the **OK** button when it returns to the Templates and Add-ins dialog box. The specified Word template should now be applied to the existing Word document.

MICROSOFT POWERPOINT WALKTHROUGH

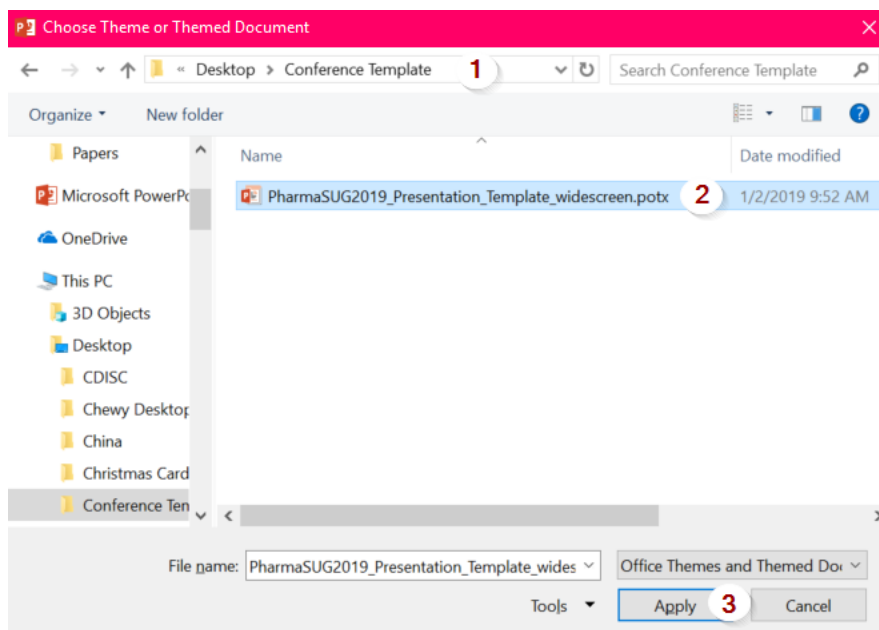
1. Open the PowerPoint document you would like to apply the template to, then click the **Design** tab and choose the ▾ button in the **Themes** section.



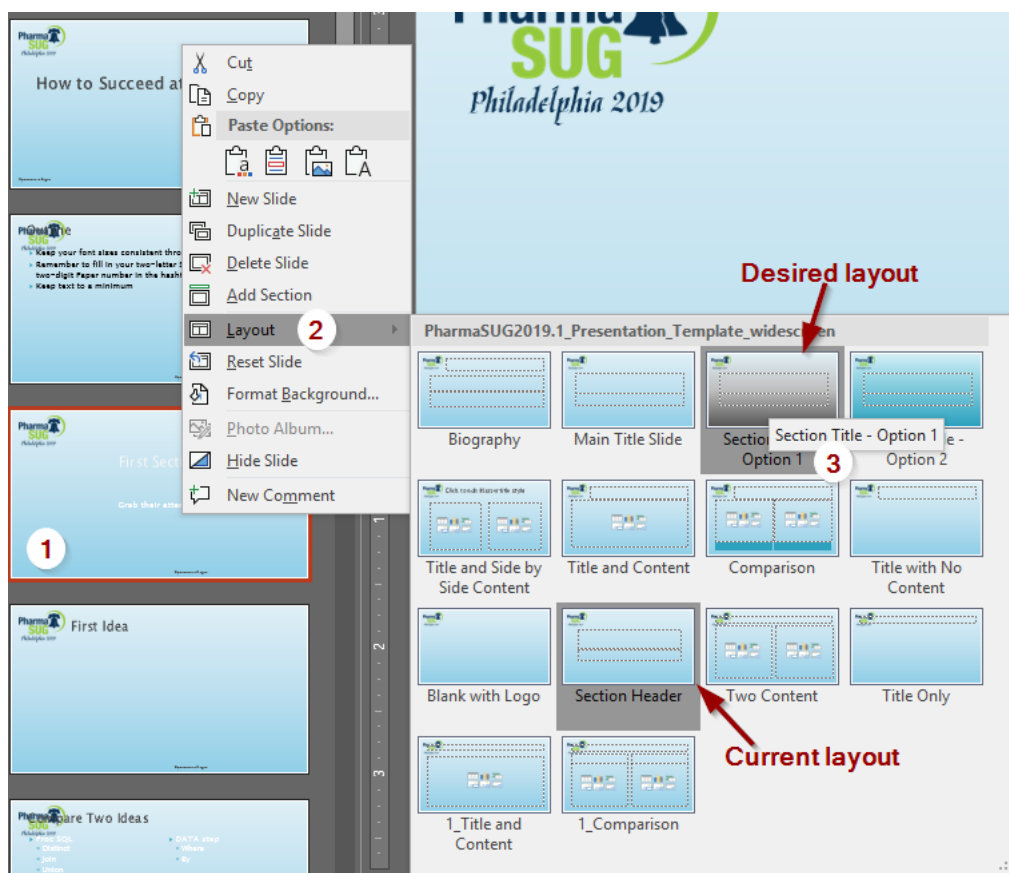
2. A new box should appear. Click the **“Browse for Themes”** option at the bottom of the box.



3. A new dialog box should appear. In this new box, (1) open the folder containing the new template to be applied, (2) select the new template, and (3) click the **Apply** button.



4. The specified PowerPoint template should now be applied to the existing PowerPoint document.
5. In some instances, portions of the existing theme may be carried over. To ensure the slide is using a layout from the new template, you can (1) select the desired slide and right click, (2) select Layout, (3) select the desired Layout from the new window. Note that all possible layouts will be included even the ones from the existing theme. So be sure to select the one that corresponds to the new theme. When first opening the Layout window the current layout will be selected.



ADDITIONAL NOTES

For both the word document and the presentation, minor adjustments may need to be accounted for when converting to a new template. Some things to pay careful attention to are:

1. If you had put anything into the original document by hand (e.g., another conference logo, your company logo, page numbers, headers, footers, etc.), then those will still appear in the new template. You will need to check for and delete these items if they are inappropriate additions to the new template. If you wish to keep these items in the new template, you will need to check for their placement to make sure that they had transferred appropriately.
2. It is always a good idea to check spacing once you have applied your conversion. We want to make sure that your paper is neat and clean with fitted lines and paragraphs. Whenever performing a conversion, some unavoidable adjustments may be made, so it is always worth an additional check.
3. Be sure to check font coloring if the existing and new templates differ in their color schemes. Some font coloring may still carry over (or accidentally change), so you want to make sure that the coloring matches the template and/or your personal choices within the document.

This is not an exhaustive list of things to look for when reviewing the conversion. In general, once you have converted the existing document to the new template, it is a good idea to go through the documents to ensure that miscellaneous information is not carried over and that the converted document is easy to read with now major issues.

The intent is not that there will be a 100% conversion of all aspects. But the approach described above will convert a good portion of the material to the new template and save a lot of copying and pasting from the existing template to the new template.

REFERENCES

<https://support.office.com/en-us/article/load-and-apply-a-personal-template-71262c90-1447-4109-90f3-eb84f9d06c98>

<http://www.readyswap.com/powerpointtemplateguide.htm>