



THE PHILATELIC COMMUNICATOR

Journal of American Philatelic Society Writers Unit #30

On the Web: www.wu30.org

Fourth Quarter 2008

Developing a Layout Template for Digital References and Studies

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Part VI

After planning the subject and content of your Digital Philatelic Reference or Study (DPS), important questions remain. “What should the layout look like?” “How can I make all the pages look the same?” “How can I re-use elements to minimize the effort?” “Is there a way to automate some of the work?” These main questions can be addressed through use of a master layout template.

A well-designed template keeps our design consistent by maintaining a standardized format across all pages for the common elements within the study. This practice allows us to concentrate on our intent and creativity rather than the daunting task of adding every individual item manually and making sure the basic stuff works.

The following steps are meant to introduce concepts and methods. Additional bells and whistles are yours to develop in making your DPS and work unique. We'll use basics from the pyramid structure outlined in *Planning a Digital Reference and Study* (TPC Fourth Quarter 2007) and some of the typeface, style, size and alignment information from *Formatting a Digital Reference and Study* (TPC First Quarter 2008) in designing our template.

Our Most Important Goal

Good layout and consistency function without notice.

Layout of a Content Page

It is important to visualize a page's layout and be able to rearrange its components without being afraid you're breaking something. An easy way to do this is to forget the computer for the moment and imagine we're back in kindergarten.

Begin your layout development using common tools. A pencil, ruler, graph paper, and a few note cards will do nicely. Don't be shy — break out that old crayon box with the blunt-end scissors.

Draw several squares or rectangles in various sizes and color them lightly in different colors. Make sure they're not too small so they're easily manipulated and cut them out like puzzle pieces. Let's make a couple of small circles or ovals while we're at it and color them as well (in different colors than the larger pieces). These pieces can be moved around and even overlapped. We'll see how the pieces might fit together and how our layout might *look* and *feel*. It's a very basic exercise with generally superior results as we are having fun and not worried about complex technology.

Next, let's arrange the pieces to determine the size and place-

ment of the header, content, and footer for our content page layout. Remember, simplicity is good, but innovation is better. I'd like to encourage you to *design* and go beyond my strict block layout example — it's only a learning tool. As always, the choice is yours and block layouts are not bad things. Once the main pieces are in place, write the names *Header*, *Content*, *Footer*, etc. on them. (Fig. 1)

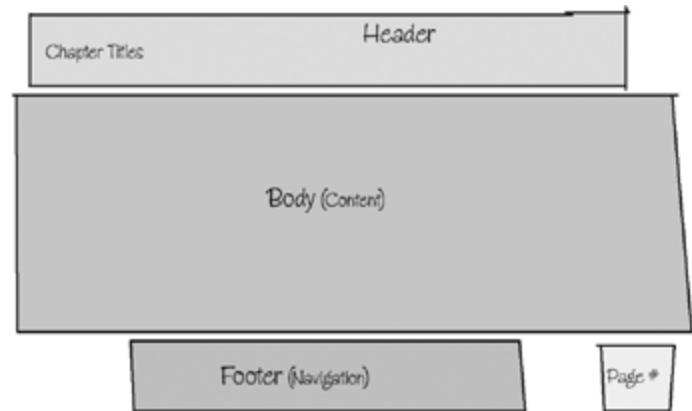


Fig. 1 Crayon Design Shop Results

We'll also use PowerPoint's default page layout for the 'title' page as it will differ from the layout of our content pages. You may decide to make additional layouts depending on the need for subsections, or special content in your study.

Congratulations! You've just designed a basic layout for your study. Put the crayons, ruler and the scissors away and get a snack — you deserve it.

Ready, Set, Power On

Words in Advance

We'll use Microsoft PowerPoint simply because many people have access to it. Instructions will be limited to the necessary steps to build a basic template.

Note: The following instructions were developed using a Macintosh version of PowerPoint. Menus in the Windows version may not be exactly the same, but the methods will be very similar.

Hardware / Software

Ensure your computer is operable, has an appropriate version of Microsoft PowerPoint software installed, and that the program runs. (Phase 1 is complete.)

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Template — Continued from Cover

Laying the (File System) Foundation

Begin by making a new folder on your computer to hold all your study files and graphics. This new folder can be named anything you wish and may be stored anywhere you choose on your computer's hard drive or even on external media. The typical default location is usually the *documents* folder.

1. Click on the *New Folder* icon in the tool bar.
2. Name this folder *My Famous Study* (or a name of your choice).
3. Open this new folder and make another new folder inside it named *Images*. All your graphic images will be stored here.

Adding subfolders within *My Famous Study* to organize study materials guarantees you'll know where things are when you need them. Organizational options include arranging files by file format (i.e., pdf or doc) or document type (i.e., interviews or references). Ordering them by state is also an option — i.e., complete or finished. The arrangement is up to you, but using a system of some sort will make life easier later.

Reviewing PowerPoint's Interface

Let's crank up the PowerPoint software.

1. Locate and open the PowerPoint application on your computer.
Windows *Start* ► *Programs* ► *MS Office* ► *PowerPoint*.
Mac *Mac HD* ► *Applications* ► *MS Office* ► *PowerPoint*.
2. The PowerPoint application opens.
3. The *Project Gallery* screen appears.
4. Select *PowerPoint Presentation*.
5. Click *Open* ► *Blank Documents*.
6. A new document window appears and the screen displays a blank slide. The title slide layout is displayed by default with text blocks for the title and sub-title included. (Fig. 2)



Fig. 2 Project Gallery Window

This is the *Normal View* for PowerPoint documents and there are three panes visible in this view:

1. The *Outline* pane, left, which shows the thumbnail view of the *slides* in your study,
2. The *Slide* pane, right, the area for adding data (main area),
3. The *Notes* pane, bottom is for such information as file location,

etc. Click in the window to add notes

The *ribbon* areas across the top and to the left hold menu selections and tool bars. (Fig. 3)



Fig. 3 Normal View with Three Panes

A series of small icons appears in the lower left of the main window. These icons allow the window display mode to cycle between *Normal*, *Outline*, *Slide*, *Slide Sorter*, and *Slide Show* views depending on which is chosen.

A *Drawing* toolbar may also be located at the bottom of the screen. If the toolbar is not showing, choose *View* ► *Toolbars* ► *Drawing*.

Our First Study

Let's start with a basic PowerPoint file which we can modify using the screen we just opened.

1. Click on the *Title* text and enter the name of your study. (Fig. 4)
2. Click on the *Subtitle* text and enter the subtitle of your study.

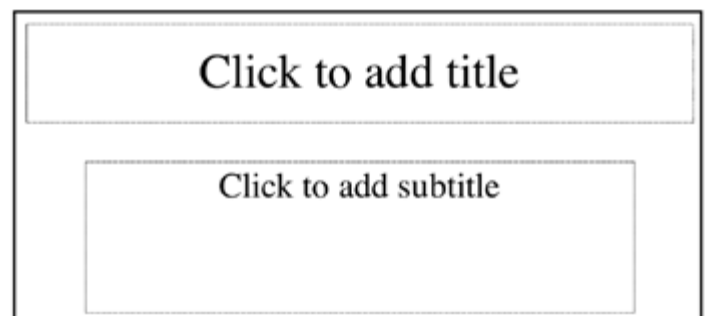


Fig. 4 Title Page Template

3. Reposition or resize the text boxes as desired using the *box handles*, which are small squares in the corners and middle of the boxes.
4. Select the *Title* text and reformat it by setting the typeface, style, size, and alignment.
5. Repeat steps 3–4 for the *Subtitle* of the study.
6. If a *Copyright / Author / Date* or other boxes are desired:
Insert ► *Text* ► *Text Box*
7. Repeat steps 3–4 for these boxes. (Fig. 5)

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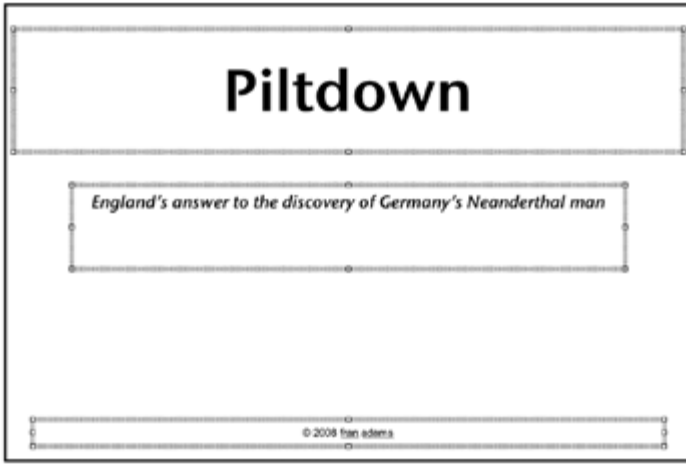


Fig. 5 Text and Repositioned Boxes

Template — Continued from Page 5

Save this file with a shortened version of the *Title* of your study. That way it will be obvious what it is, but it won't be confused with other files. Ensure you've saved it into the folder *My Famous Study*.

8. From the main toolbar, select *File* ► *Save As*.
9. Name the file by typing in the *File Name* box.
10. Select the location to save the file to in the *Save In* box. (This will be your new subdirectory folder in *My Famous Study*.)
11. Select the file type in the *Save as Type* box ► *PowerPoint (.ppt)* format. (It may already be selected.)
12. Click *Save*.

Note: Multiple column layouts are also an option. We are using the most basic layout to keep these instructions reasonably short.

Color Schemes

In this exercise, we'll use a standard color scheme included with PowerPoint. These schemes match colors and shades for text, backgrounds, etc. so the overall *look* of the study is pleasant.

To coordinate our color scheme:

1. From the main menu, choose *Format* ► *Slide Color Scheme*. (Fig. 6)
2. Choose the desired option — White background, black text and blue highlights in this case.
3. Click *Custom* to see the itemized color settings.
4. Click *Apply to All*.
5. Select *File* ► *Save* from the main menu.

Note: Other options for slide design also appear under this menu choice. We're only using the most basic of choices here.

Building a Slide Master

A *Slide Master* is the heart of our template and allows us to apply common, static items and styles to the entire study. We can set up text block positions, typefaces, sizes, styles and colors.

1. To insert a new *slide* to develop the *slide master* choose *Insert* ► *New Slide*.
2. To display the *slide master* choose *View* ► *Master* ► *Slide Master*. (Fig. 7)
3. The *Slide Master* appears. (Fig. 8)

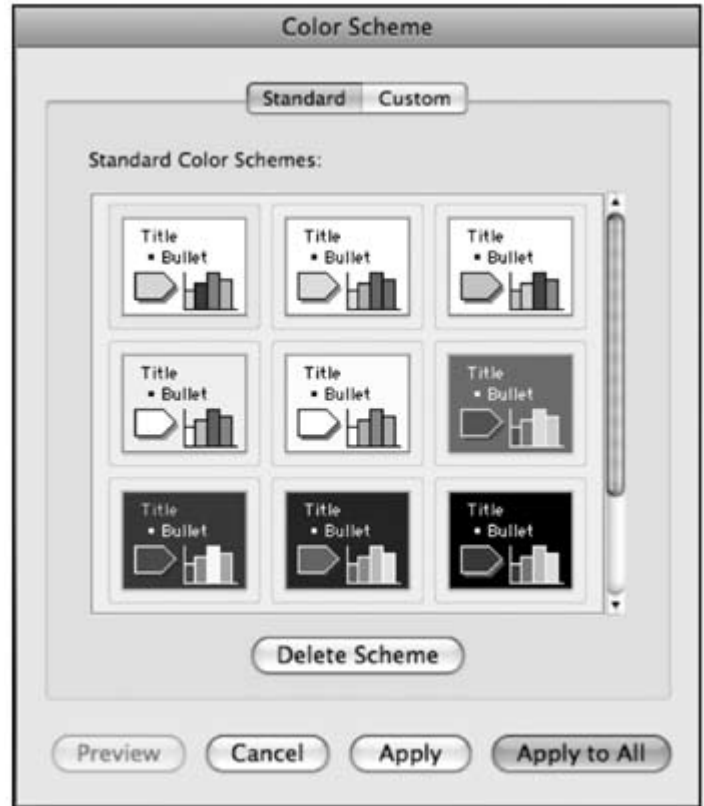


Fig. 6 Color scheme panel



Fig. 7 Slide Master Selection from Menu

Note: The newer versions of PowerPoint have the ability to create multiple templates. We'll use only one to keep things simple.

We will always put our *Section Title* in the *Master Title* box.

1. Click on the *Master Title* box. (Fig. 9)
2. Reword the text to *Click* to edit page title.
3. Highlight the text and reformat the text typeface, style, size, and alignment.



Fig. 8 Slide Master



Fig. 9 Master Slide Template

4. Reposition and resize the *Master Title* using the *box handles*.
5. Click on the *Master Text* box.
6. Reword the text to *Click to edit content text*.
7. Highlight the text and reformat the text typeface, style, size, alignment, and paragraph spacing.
8. Highlight the text and turn off the *Bullets and Numbering*.
9. Reposition and resize the *Master Text* using the *box handles*.
10. Delete the *Date/Time* box in the lower left corner.
11. Click on the *Footer* box.
12. Reposition and resize the *Footer* box using the *box handles*.
13. Delete the text *<footer>*,
14. Enter the word *Home* followed by a double space and a *pipe* symbol (|) followed by another space.
15. Enter the word 'Introduction' with a double space and a 'pipe' symbol (|) followed by another space.
16. Enter the *Section*' titles of the study followed by *pipes* and double spaces between words.
17. Enter the word *References*.
18. Select all of this text and resize it accordingly to fit the box.

- Note:** We'll return later and incorporate navigation hyperlinks.
19. Click on the (page) # *box*.
 20. Highlight the # and reformat the typeface, style, size, and alignment as desired.
 21. Reposition and resize the # *box* as desired using the *box handles*.
 22. Select *File*' ► *Save* from the main menu.

Using the Template

We'll add a new slide for each *Section* of the study.

1. Choose *Insert* ► *New Slide*. The default layout appears, with our layout boxes in their correct positions.
2. Enter the desired text (subtitle, placeholder text, etc.) in the appropriate boxes. (Fig. 10)



Fig. 10 Add Pages for Each Section

3. Add slides for all 'Sections' of your study.
4. Select *File* ► *Save*.

One Size Does Not Fit All

In some instances, this basic template may not be exactly what's required for all of your content and it's not necessarily meant to be. The template is the lowest common denominator of your design and it is there to perform the grunt work so you don't have to. Some modifications are to be expected. The template should be a helpful and flexible guide, not a rigid taskmaster.

The format of individual pages can be modified for specific content by re-positioning, deleting or adding boxes on a specific page to suit your needs.

1. *Insert* ► *Text* ► *Text Box* as desired.
2. Reposition and resize the new *text box* using the *box handles*'.

Conclusion

With our layout and template defined, our master plan is almost complete. Addition of a page and section navigation system will provide the ability for users to move from one section to any other section without going through every page sequentially to get to the desired destination. The next article will review how main section navigation can be incorporated into our document along with specific page movement. We'll also embed links to draw on reference documents.