TEMPLATE TIPS

A reference guide for the University of Georgia DAR document templates. If you have questions about the templates that this document does not answer, contact Clarke Schwabe (ccschwabe@uga.edu, 706-542-8386).



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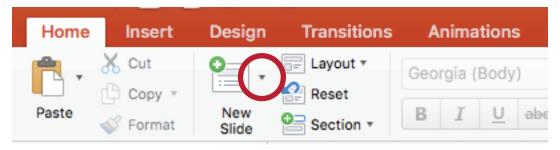
COMMON TIPS

Preferred fonts and colors

Our templates are designed specifically with UGA brand colors and fonts in mind, so please use only those fonts and colors designated as theme fonts and colors in the templates.

- Our fonts are Georgia or Arial Narrow Bold. Generally, Georgia is good for body text and Arial Narrow Bold works well for titles and headers.
- Your document's primary colors should be the designated theme colors in the template.
 UGA brand colors found at <u>brand.uga.edu/color</u> may be used very sparingly.

Adding pages to your document



Once you've opened a template file and you're ready to begin constructing your document, you can add pages by clicking the small down-arrow next to the New Slide button in PowerPoint. This will present you with all the page options.

Some of these options have two versions, an Example sheet and a Template sheet.

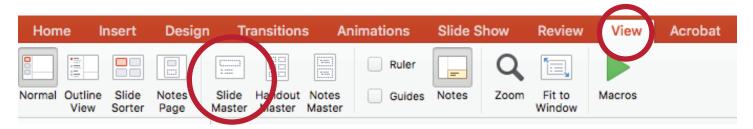


The Example sheet cannot be edited outside of Slide Master view and exists to show you what a Template sheet can do. The Template sheet is what you should use as a page for your document.

Accessing Slide Master

Slide Master is where you can make changes across your entire document. In Slide Master view, you're able to edit every pre-set page the templates allow you to place, and those edits are implemented across every page of that type in your document. For this reason, it's important to be very careful about the changes you make in Slide Master.

To access Slide Master, click the View tab at the top of your PowerPoint window, then select the Slide Master button.

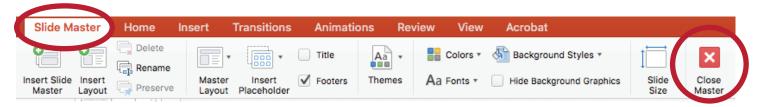


One change you will want to make for every document you produce using these templates is found in Slide Master: the header. If you want to include a header with the document recipient's name(s) on it, select the top page in the list on the left side of the window, then click the text on the page that reads "RECIPIENT NAME HERE" and change it to your recipient's name(s). If you do not wish to have a header in your document, select this text and delete it.

As a side note to this, two other things you should always check when creating documents with these templates: the cover and the table of contents. If you are using either of these pages, note that you must manually adjust the recipient name on the cover page and the page numbers on the table of contents.

When in Slide Master, do not change any settings under the Themes, Colors, Fonts or Background Styles buttons. Any change to these settings affects all elements of the document and removes UGA branding.

Finally, to return to the normal view of your document, select the Slide Master tab and click Close Master.



Saving your document

What you plan to do with your finished document determines how you should save the completed file. If you are planning on printing the document or presenting it as a digital document, click File, then Export. On the resulting window, make sure the selected File Format is PDF, then save your file. If you are planning to use the file as a PowerPoint presentation, you can simply save as normal: click File, then Save.

Sharing large files

In November 2020, <u>active UGA faculty</u>, <u>staff and students were given access to a suite of Google services through their UGA MyID account</u>. This includes **Google Drive**, a cloud storage service that allows easy sharing of files of any size.

If the file you wish to share is too large for sending via email and you'd like to allow your recipient long-term access to the file, Drive is a good solution.

To access your UGA Google Drive, first go to drive.google.com.

If you are already logged into another Google account (Fig. 1), click that account name at the top right of your browser window, then select Add another account.

If you see "Choose an account" and a list of accounts (Fig. 2), select your UGA account if you see it. Otherwise, select Use another account.

If you see a button at the top right that reads **Go to Drive** (Fig. 3), click it.

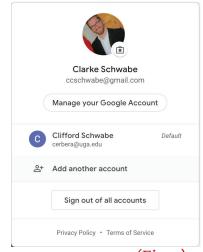
Next, you'll be asked to enter your email address. Enter your UGA email here.

 If you associated your UGA email with a Google account prior to November 2020, you will be asked if this is a Google Workspace account or a Personal Google Account. Select Google Workspace account.

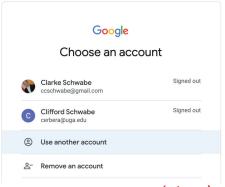
You should now see the typical UGA Single Sign-On page. Log in as you normally would to your UGA account.

Once you're logged in, you can create folders, upload files and share them with whoever you like. There is no limit on how much data you can store on your Drive, so you can share files of any size using the Drive.

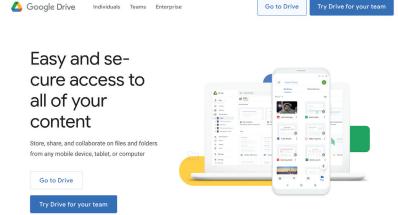
To upload files, you can either drag the file you wish to share directly into your Google Drive window, or you can click the New button at the top left of your Drive window and select File upload.



(Fig. 1)



(Fig. 2)



(Fig. 3)

To share files, **right click** on the file you wish to share, then select **Share**. From here, you have two options. You can either share directly with individuals via an email message, or you can get a link that will allow to share the file with anyone who has the link.

To share directly via email, enter the email addresses of your recipients in the text field beneath **Share with people and groups**. Once you enter at least one address, the share window changes, allowing you to change the recipients' permission level via a pulldown menu to the right of their name (I recommend **Viewer**, to remove the possibility of accidental changes



to your file) and enter a message to the recipient. Once you're ready to send, click **Send** at the bottom of the share window, and an email will be sent to the recipient with a link to the file.

To share via a link, click the window titled **Get link**. Once this window expands, click the pulldown menu beneath the URL and change the link's sharing setting to **Anyone with the link**. Check to make sure that the pulldown menu to the right of **Anyone with the link** has **Viewer** selected. Next, select **Copy link**, and the URL will be copied to your clipboard, ready for you to paste into a message to your intended recipients.



Recording your screen

Should you need to make a presentation of your document digitally, programs like Zoom allow screen sharing that can make this possible in real time, but if you need to record your presentation for the recipient to view later, you have a few easy options.

Mac/QuickTime Player

First, make sure your document is open and you're ready to present. If you can, it's worth it to run through the presentation in full at least once before recording—you might even want to record this "dry run" to make sure all your equipment works as expected and to find any kinks in the presentation.

Also, scan your computer screen for anything you don't want to show up in the recording. Recording your entire screen is the easiest way to make the recording, so look at all your open windows and clear out anything you don't want to appear in your recording. You also probably want to close any programs that might create a notification during your presentation—Outlook, Teams, Slack, whatever.

Once you're ready, open QuickTime and select **File, New Screen Recording**. QuickTime will then ask you to select how you want to record the screen.

Using the buttons that appear at the bottom of your screen, you can choose to record everything that appears on your screen or just a portion of what appears on your



here you'd like to resulting vide

Desktop

Documents Mail

Messages

√ 5 Seconds

10 Seconds

None

✓ Blue Snowball

✓ QuickTime Player

Other Location...

Built-in Microphone

✓ Show Floating Thumbnail

✓ Remember Last Selection

Show Mouse Clicks

screen (which brings up a box you will resize to set the bounds of what is recorded). The

simplest way to record is to select the **Record**

Entire Screen button.

You can also make some decisions about where you'd like to have the resulting video saved, whether you'd like a countdown before recording begins, what microphone—if any—you'd like to use, and several other features. I recommend enabling the 5- or 10-second countdown so that you have a moment to prepare your windows (and yourself) before recording starts.

Importantly, you can also choose where you want your screen recording to be saved. I recommend clicking **Options**, then **Other Location**... to select the precise location you want your video to save to.

When you'd like to begin recording, simply click into the window you want to record. If you've set a 5- or 10-second timer, you'll see it tick down

you've set a 5- or 10-second timer, you'll see it tick down.

Once you're done recording, click the **Stop Recording** button in the menu bar at the top of your screen. It should be to the far left of the set of icons that includes your battery and WiFi connection.

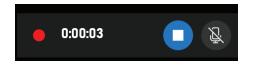


Windows/Xbox Game Bar

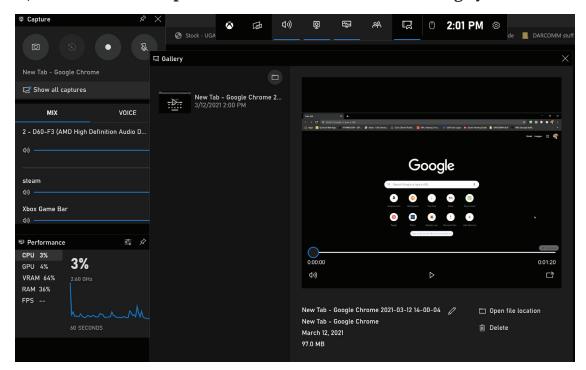
On Windows 10, you can record your screen with the push of a button... well, three buttons: hold the Windows and Alt buttons, then press R. But wait!

Because Windows 10 makes recording so quick and easy, make sure you have your windows ready before pressing those buttons. Recording will begin immediately after you press them.

Once you're recording, you'll see a small window that indicates how long you've been recording and contains a **Stop Recording** button. Once you're finished, click that **Stop Recording** button.



To find your recording, **hold the Windows button and press G**. This will open the Xbox Game Bar. If you've just finished your recording, you will likely see the Gallery window, but if you don't, select **Show all captures** to see all the screen recordings you've made.

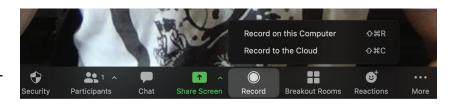


From here, you can delete your recording if you aren't satisfied with it, or you can select **Open file location** to go to the folder containing your recorded file. You can move this file to wherever you need it to be just like you would any other file.

Zoom

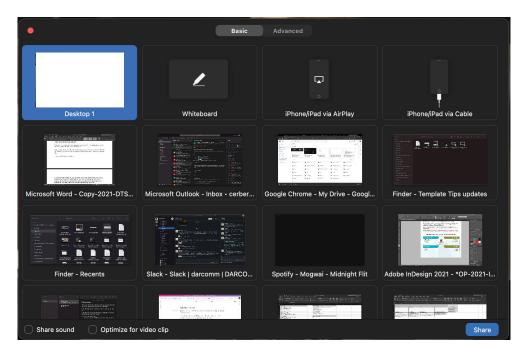
Zoom's recording functionality can pair with its screen sharing capabilities to allow you to package a video of yourself presenting WITH a recording of the presentation itself.

To begin, start a new meeting, get your presentation ready, then at the bottom of your Zoom window, click Record and Record on this Computer.

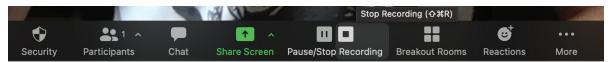


The beginning of the video will always be from your camera (unless you trim the video after the fact, which we'll touch on in a bit), so be prepared to open the presentation with the camera on you.

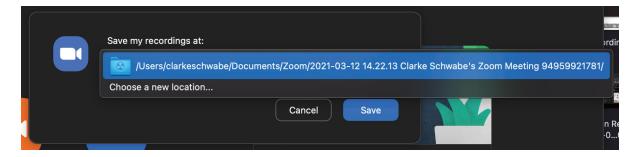
Once you're ready to switch to your presentation, select **Share Screen** at the bottom of your Zoom window, then in the new window that opens, **select the window containing your presentation and click Share, at the bottom right**. You can now begin to move through your presentation, and a small video of yourself will remain in the top right corner.



Once you're finished, click **Stop Share** at the top of the screen to end screen sharing and have your camera take over the video, and once you're fully done with the recording, click **the right side of the Pause/Stop Recording button** (this is important, as the left side of the button will only pause the recording, not stop it), and end the meeting.



Once you've ended the meeting, Zoom will take some time to convert the meeting recording, and when it's done, it will give you the opportunity to select where the recording is saved. Click the pulldown menu, select Choose a new location, then navigate to the folder where you want the recording to be saved and click Choose.



Trimming your video

Sometimes you end up with a little more on the beginning and/or end of your video than you'd like. Trimming those bits away is very simple on Windows or Mac.

Trimming video on Windows

Trimming video on Mac

TEXT

Body text size

When dealing with body text, we recommend using a font size no smaller than 11 pt and no larger than 14 pt.

Title/header size

When sizing the text in your titles and headers, watch out for the number of lines your title/header creates. Use your best judgment on this—the idea is to balance emphasis with readability. We believe that limiting the title/header to 1 line is best, 2 lines are good, 3 are acceptable, but more than that begins to be distractingly large.

Text frame resizing

Text frames can be set to either automatically resize the text within them or to resize themselves based on that text. This can be useful if you have a set amount of space you'd like to devote to text, regardless of text length, or if you need a text frame to adjust to the length of your text, in order to use the text frame to align other objects on your page.

By default, all text boxes (except on the cover page) in our templates do not have either option selected. If you would like to enable these settings, though, you can do so by accessing Text Options.

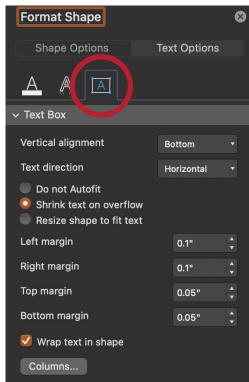
To access a text frame's Text Options, right-click anywhere in the text frame and select Format Text Effects. This will open a panel on the right side of your window. Here, select the Textbox button, which looks like a small white block of text.

This will present you with a number of options, including **Do not Autofit, Shrink text on overflow, or Resize shape to fit text.** These options will apply only to the text frame you right-clicked.

Do not Autofit: Text you enter will appear at the size you designate, regardless of the size of the text frame.

Shrink text on overflow: Text you enter will appear at the size you designate until you enter more text than will fit in the space of the frame. At this point, PowerPoint will automatically resize all text in the frame to fit.

Resize shape to fit text: Text you enter will appear at the size you designate. Once you enter more text that the frame can fit, PowerPoint will automatically resize the frame to fit.



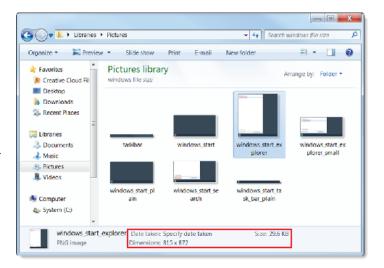
PHOTO/GRAPHIC

Using your own photos

Sometimes the photo you need is one that didn't come from the Development Toolkit, and you're not sure how it will appear on paper—no one wants a highly pixelated image in their proposal. A good rule of thumb is to use photos which have a smallest dimension of 2550 (1700 minimum).

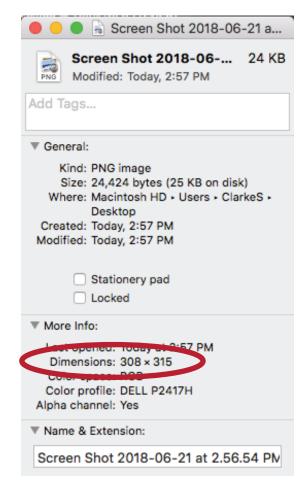
To check your image's dimensions:

 On Windows, click on your photo in an Explorer window. The dimensions should appear at the bottom of the window.



 On Mac, in a Finder window, right-click on your image and select Get Info. In the window that opens, under the More Info tab (click the title to open that tab if it isn't already open), you will find the image's dimensions.

If your image doesn't meet the suggested minimums and you still want to use it, it's best to print a test sheet using that image to see how it appears. Insert your image in the template, size and crop it the way you want it to appear, then print this page to see if the resulting image is too pixelated.



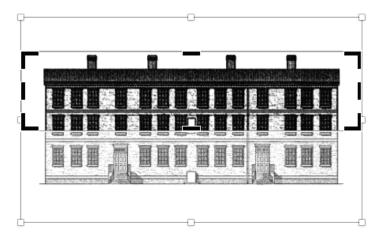
Graphic frames

In order to size your images on the page correctly and display only the part of the image you wish to show, you'll need to understand how to work with graphic frames.

To resize an image on your page, click on the image, and then click and drag one of the 8 handles (small white boxes around the image) in any direction. To maintain the aspect ratio of your image (in other words, to make it larger or smaller without making the image look "stretched"), use one of the handles on the corners of the image.



To control how much of your image is displayed, right-click your image and select Crop. This will add black bars around your image. By clicking and dragging those bars, you can control the shape of your graphic frame, which dictates how much of your image is displayed. For example, in the image below, only half of the image will be displayed because the bottom-center bar has been dragged up.



Because the handles are still visible, you can adjust the size of your image within the frame while cropping. You can also move your image within the frame while cropping by clicking and dragging the image itself.

Working with layers

PowerPoint organizes elements on each page using a layer system. This means that you can control which images and text appear "on top" of others. In the event that you are trying to put, for example, a logo over a larger image, you can use PowerPoint's Bring to Front and Send to Back commands.

Right-clicking any image will present you with those options. Bring to Front and Send to Back move the image to either the absolute front or absolute back of the layers on your page, and Bring Forward and Send Backward move the image forward or backward one layer at a time.



Inserting new images

To add new images to your document, find the Picture button on the Home tab of Power-Point. Click that button and choose Picture from File.



Moving elements from Slide Master to your document

If you find an image on an example page that you'd like to move to a document of your own, you can easily copy and paste it. Just find the page with the image you want to copy within the Slide Master, right-click the image and select Copy, then return to your page, select Edit in the toolbar at the top of the screen, then select Paste. This should put the image onto your page in the exact position it was in on the example sheet, and from here you can adjust it as you wish.

Inserting PDFs

It is possible to insert PDFs into your PowerPoint template, though you are limited to inserting just the first page when using PowerPoint to do this. For this reason, we encourage you to only insert single-page PDFs into your template document.

ON APPLE: select Picture then Picture from File on PowerPoint's Home tab. This will allow you to select a PDF file just as you would any other image file.

ON PC: Click the Insert tab near the top of your PowerPoint window, then select Object, and in the resulting window, click "Create From File..." and navigate to your PDF.

If, however, you must insert a multiple-page PDF or a PDF of a different size than your PowerPoint into your document, you will need to use **Adobe Acrobat**.

First, create your document within the PowerPoint template, export a PDF of your document, then open that document in Adobe Acrobat.

Next, select the **Organize Pages** tool on the right side of your window. Above your document's pages, you should now see an **Insert** button. Select this, and from the pulldown menu that appears, select **From File...**

Navigate to the file you wish to insert, **Select** it, and in the Insert Pages window that opens, you are able to choose exactly where in your document you'd like to insert this PDF.

Once you click OK, you'll see the PDF's pages where you chose to insert them. You can change their position by clicking and dragging. Once you're satisified with their placement, click **File**, then **Save As**, and save your new, combined PDF.

If you do not have Adobe Acrobat and you need to perform this action, contact Clarke Schwabe.

COMPOSITION

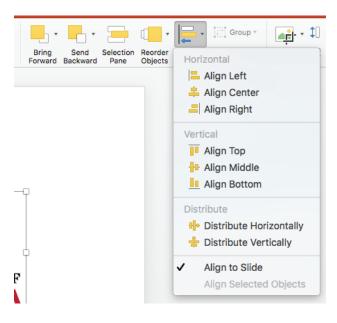
Aligning and moving objects

If you need to align one object to another, PowerPoint will automatically "snap" most objects to another object when their edges or centers are close to one another. Additionally, if objects have corresponding edges that are aligned—even if they are on opposite sides of the page—PowerPoint will display a line to illustrate their alignment. This is useful if, for example, you want the bottom of a text box and the bottom of a photo next to it to be perfectly aligned or if you want to make sure that two objects are centered with each other.





You can also align objects by selecting them and selecting the Shape Format or Picture Format tab (depending on the type of object selected) from the top of your PowerPoint window. Here, you can select multiple alignment options from the Align button.



Aligning and moving objects, continued

Sometimes, when moving objects, the "snap-to" feature might be a hindrance. If you need to temporarily disable the "snap-to" feature while moving objects, hold the Option key (on Mac) or Alt key (on Windows) to move your object freely.

Finally, the Shift key can be used while moving objects to restrict the direction of its movement. When moving objects, hold Shift while dragging the object to limit its movement to a single horizontal, vertical or diagonal axis. This is useful if you want to move something directly up, down, left or right.

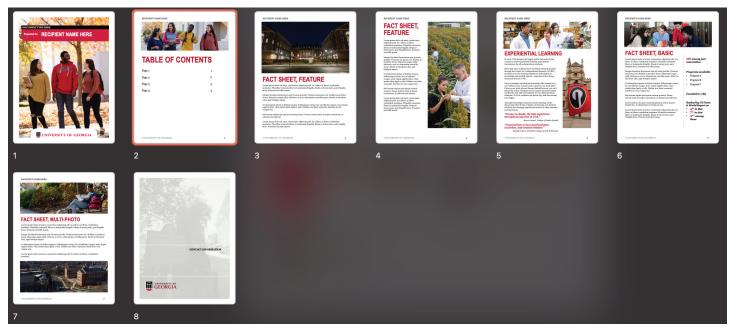
Ideas for document layout

One of the advantages of these templates is that while you have all the tools necessary to create a variety of documents, the composition of your document is up to you—you can build whatever you need based off of the materials you have and the info you want to convey. But if you need a few ideas to get started, the next few pages show a few ways you might compose your document.

Six page proposal



Eight page menu of opportunity



Double-sided one pager



Four page single fold tabloid sheet



Eight page naming opportunity menu

