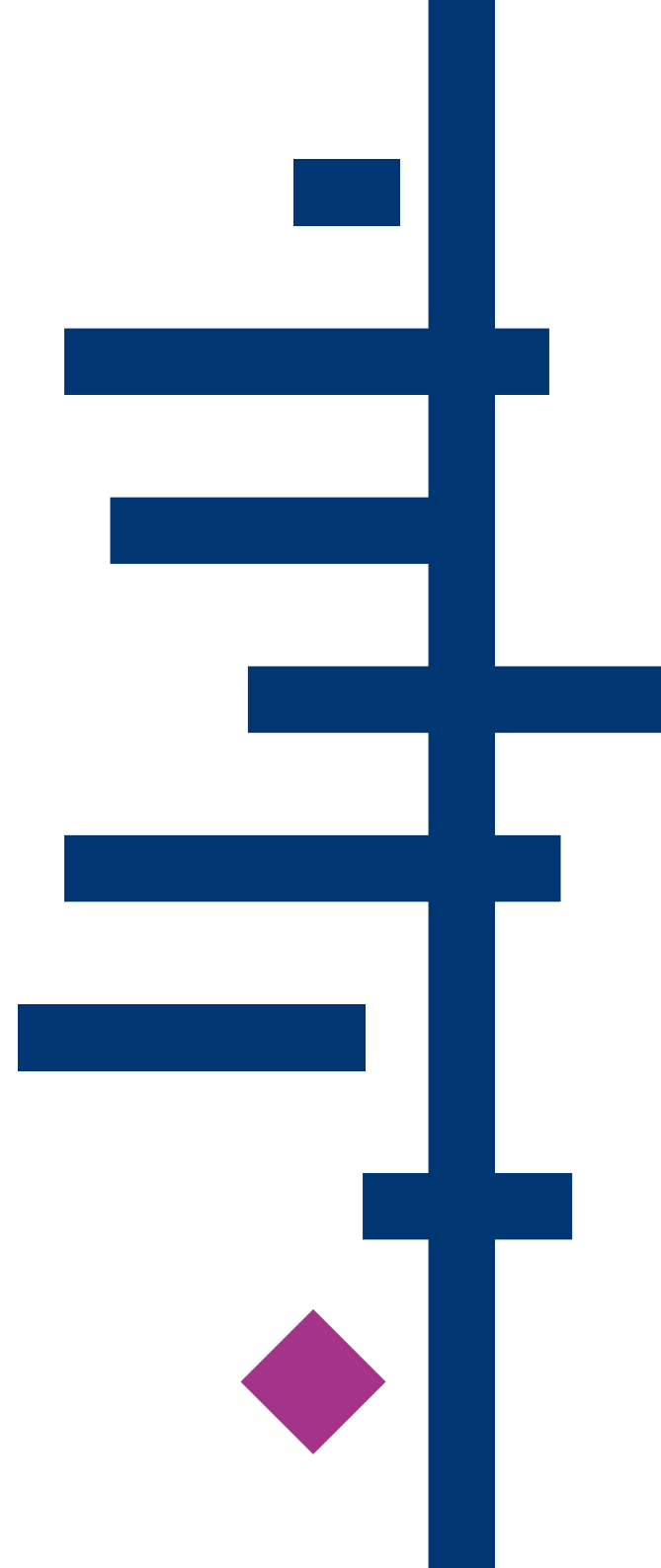


Word templates guide

An overview and useful how-to-guide to help you get the most out of the Cochrane Word templates.



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A note about Word versions and compatibility

The Cochrane Word templates and user guide have been created for users of Microsoft Office Word 2016. However, lower versions of Word for both PC and Mac should be able to use both the templates and user guide, although it is not recommended for those with version MS Office 2003 and lower. If you are experiencing any issues with the templates or user guide, or have a very early version of MS Office (e.g. MS Office 97, 98) please contact hmillward@cochrane.org

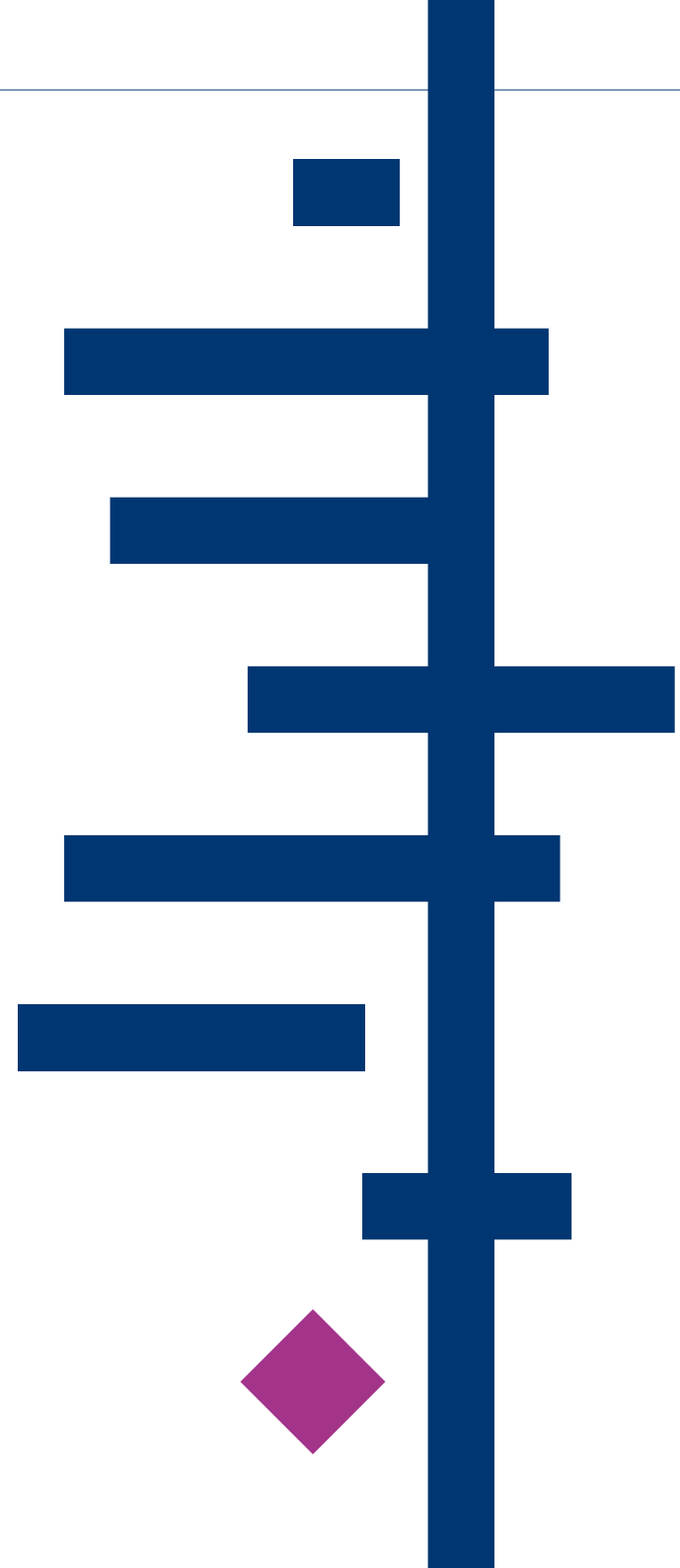
An important note about using the Cochrane font

The Cochrane Word templates have been created using Source San Pro, the official Cochrane font. It is **important** that you have installed the Source Sans Pro font onto your computer before you start using the templates.

If you have not installed the font when you open and use the Word templates the wrong font will appear throughout the document. There are instructions for how to install Source San Pro here: community.cochrane.org/organizational-info/resources/brand-pack/cochrane-master-brand

Create a document

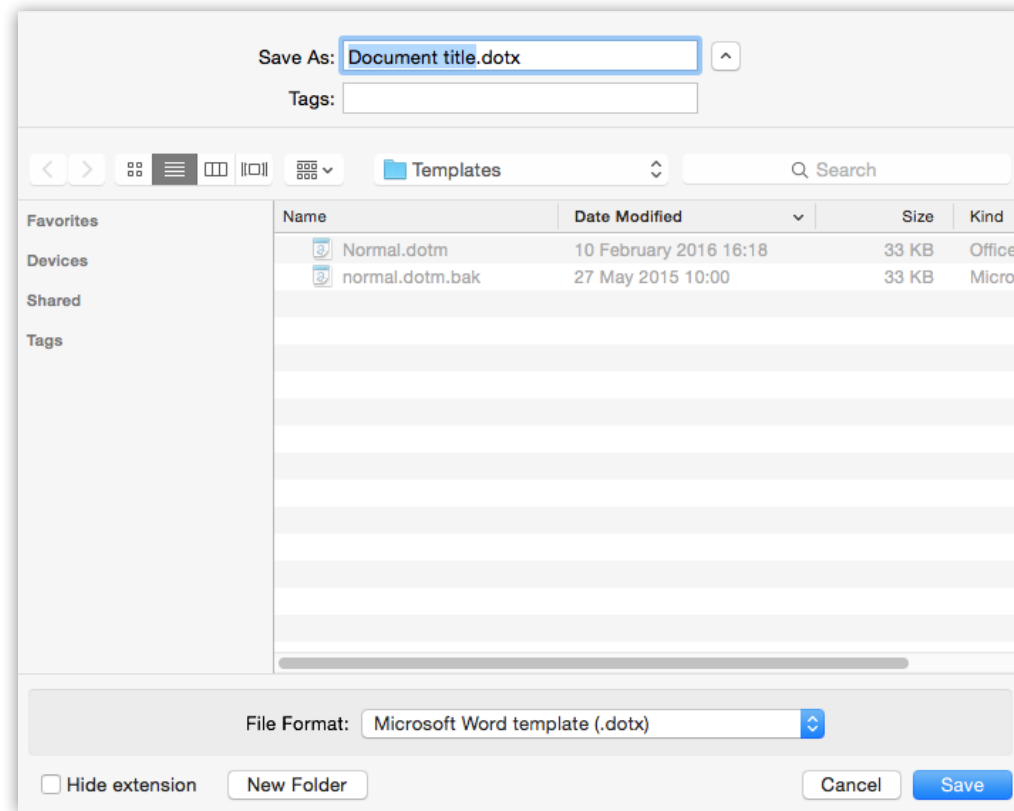
How to get started with the Word templates.



Make the Cochrane template part of your default templates

Mac users:

- Open the .dotx file in Word. Go to **File>Save as template**.
- Word will automatically change your save folder to **Templates**. Name and save your template here and it will automatically appear in your project gallery from now on.

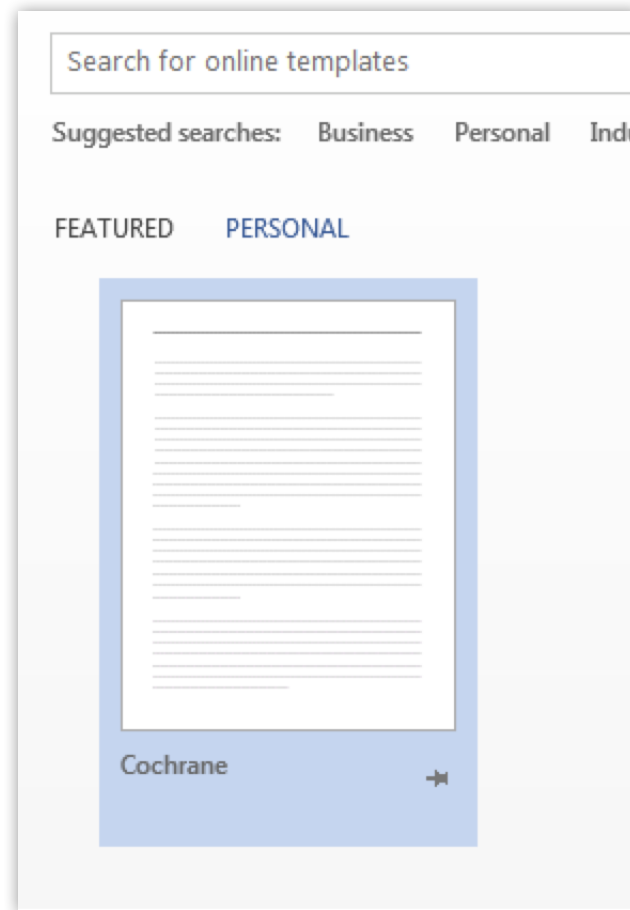


Make the Cochrane template part of your default templates

PC users:

1. Save the four Word templates to your desktop
2. Open one and go to 'Save as'
3. Choose anywhere on your computer
4. Click on 'Save as' type: Word Template (*.dotx) – This will change the location to something like 'C:\Users\YOUR_USER\Documents\Custom Office Templates in Windows
5. Add a relevant 'File Name' and 'Save'
6. Repeat steps 2 to 5 for the remaining three Word templates

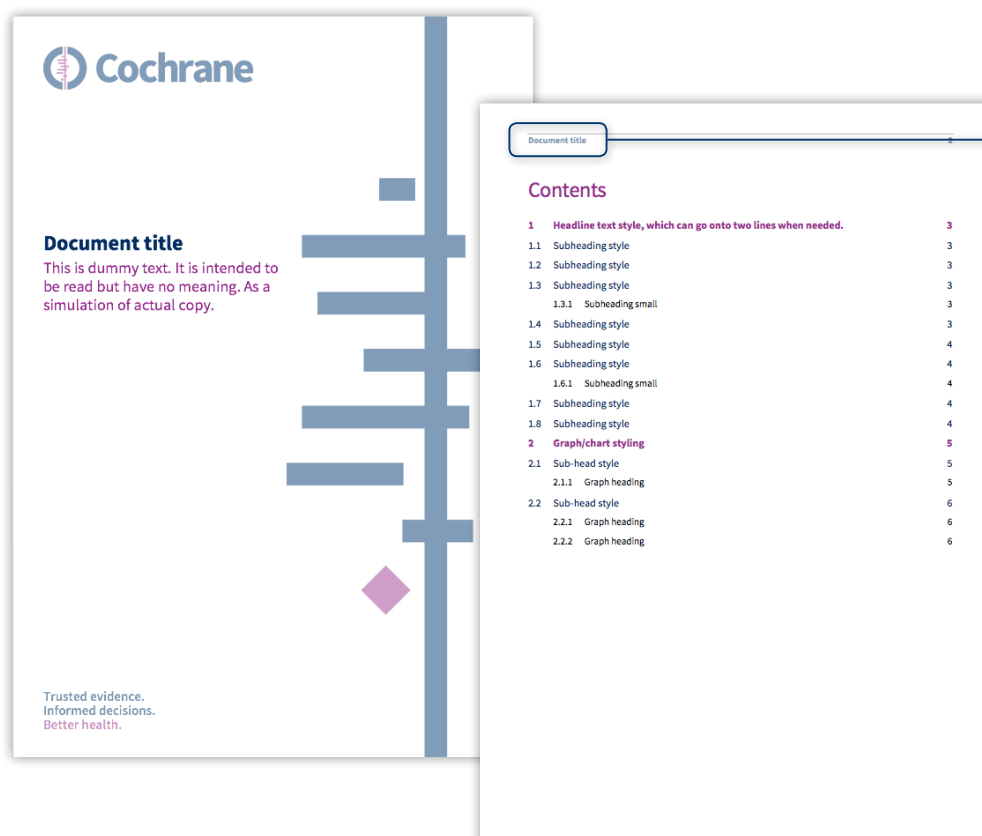
Next time you will open Word you will have a Personal option for templates:



How to start, save and name your document

How to start making your report

- Open the .dotx file in Word.
Go to **File>Save as** and name and save the document to your desired folder.
- When you open the template you will find six example pages as shown in the overview on page 10 and 11.
- Some elements look faded, this is because they are set up as master elements to avoid accidental editing.
- You can choose to write over the existing text in the template or delete everything by selecting it and start with a fresh document.
- You can always go back to the original template and copy elements you'd like to use in your report.

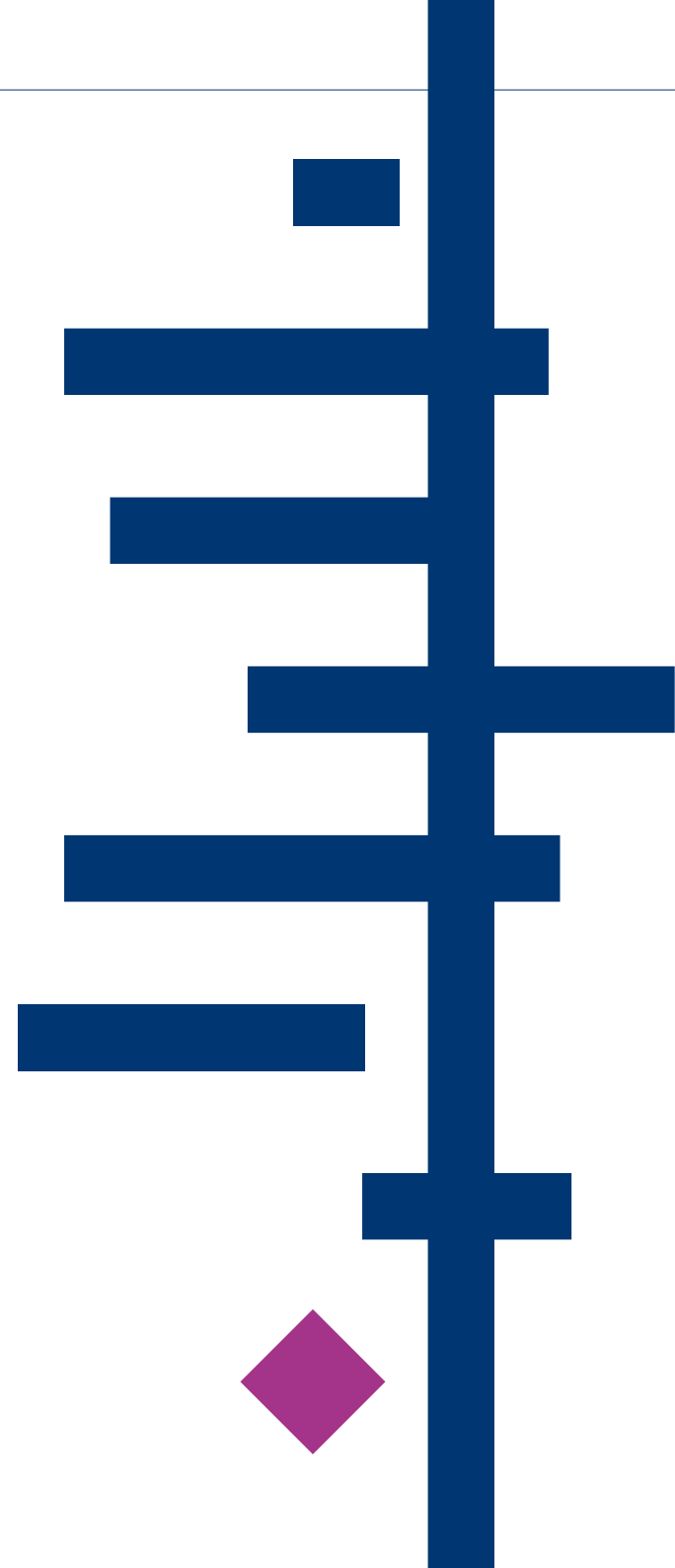


The only faded element that needs updating is the page header.

This can be done by double-clicking on the header or go to **View>Header and Footer**, which changes the view and allows you to type over the page header.

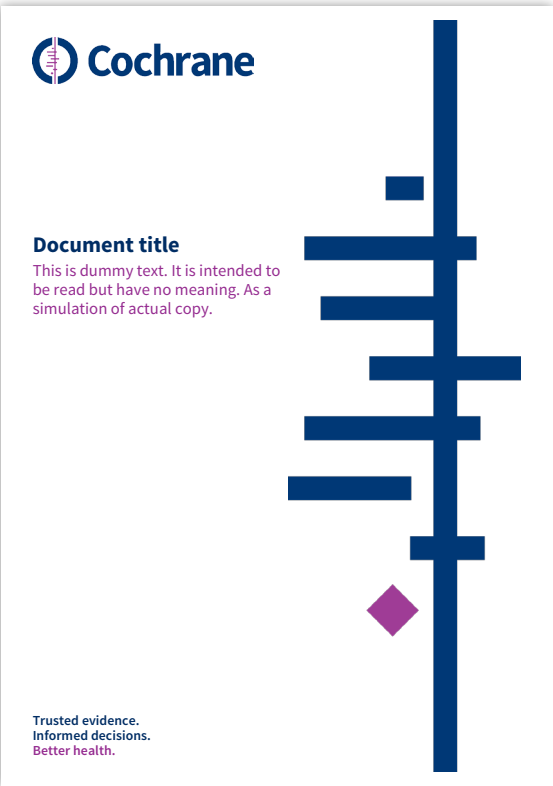
Overview

This section provides an overview of the Word templates and the basic formatting that makes them look uniquely Cochrane

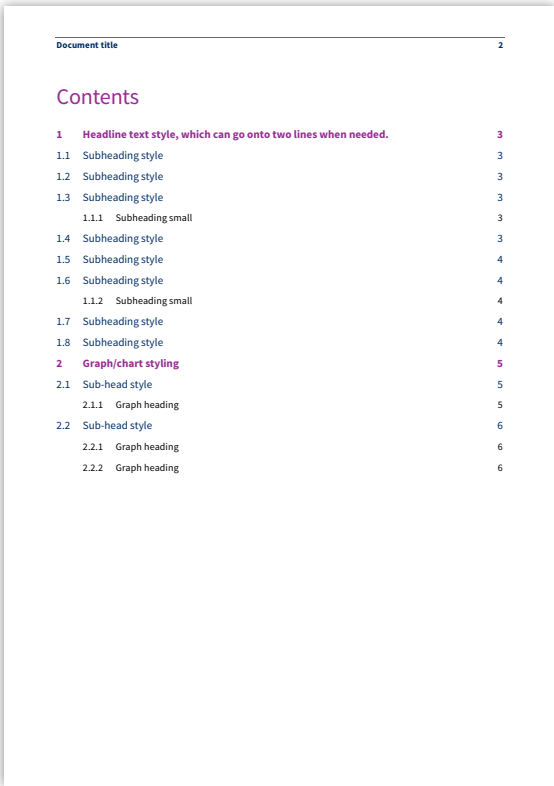


Overview of template pages

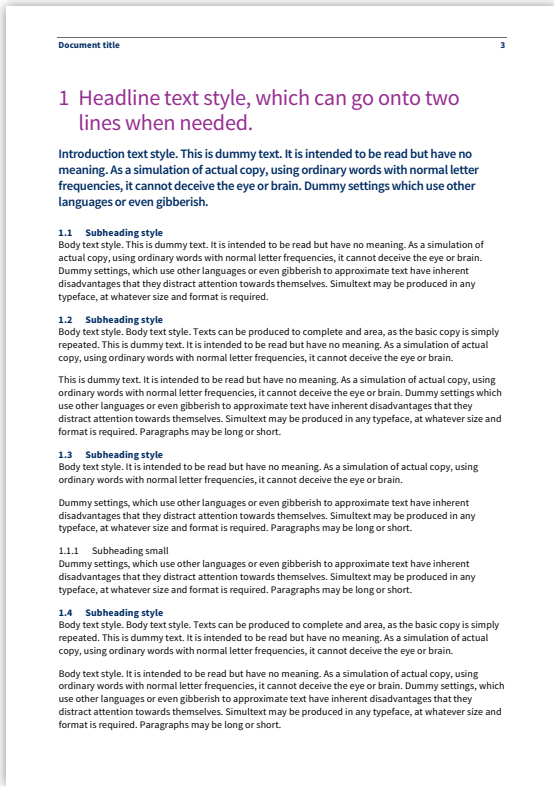
The simple template consists of 6 pages, as illustrated on this and the next page. We have also included a blank template which has the styles embedded, if you do not want to use the simple template.



Cover page

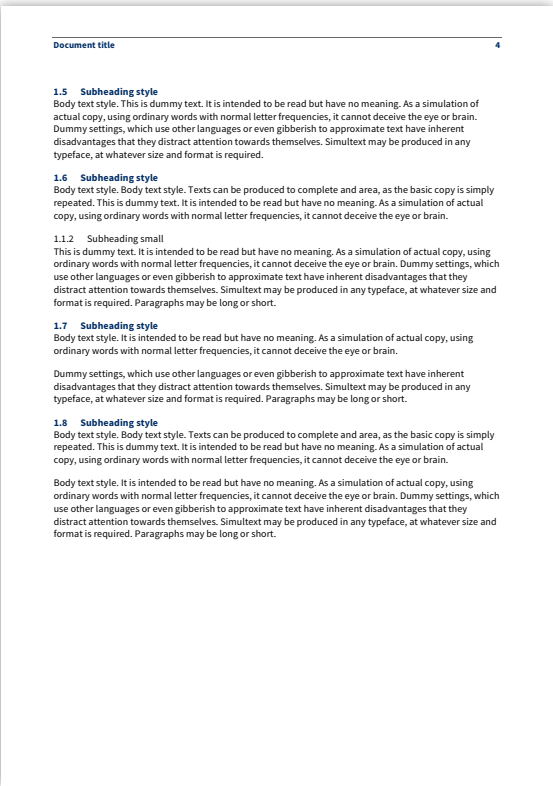


Contents page



Text page

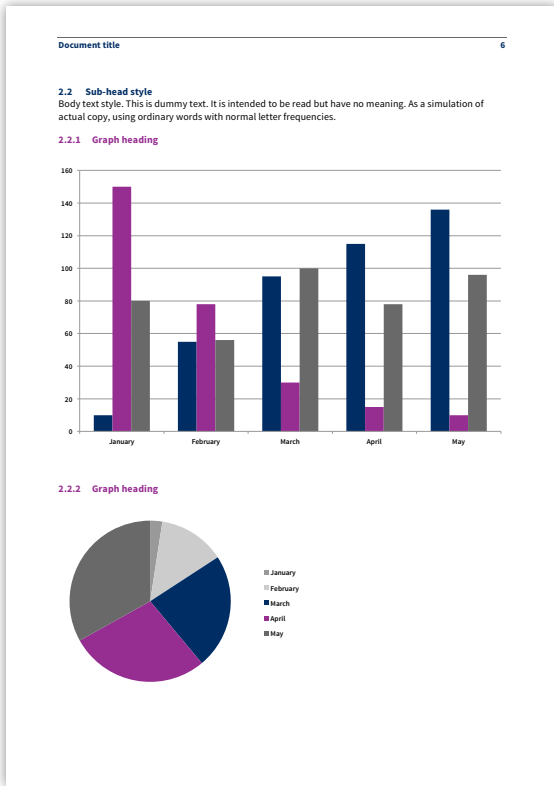
Overview of template pages



Text page



Text page with line graph

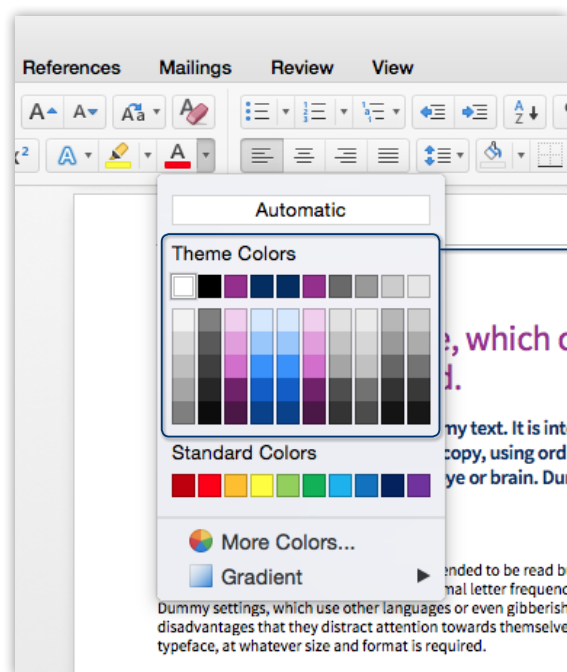


Text page with bar chart and pie chart

Overview of colours and styles

The Word templates have text styles and colours already set up to ensure the template is in line with the Cochrane visual guidelines. Please do not use any other colours or styles not already provided within the template.

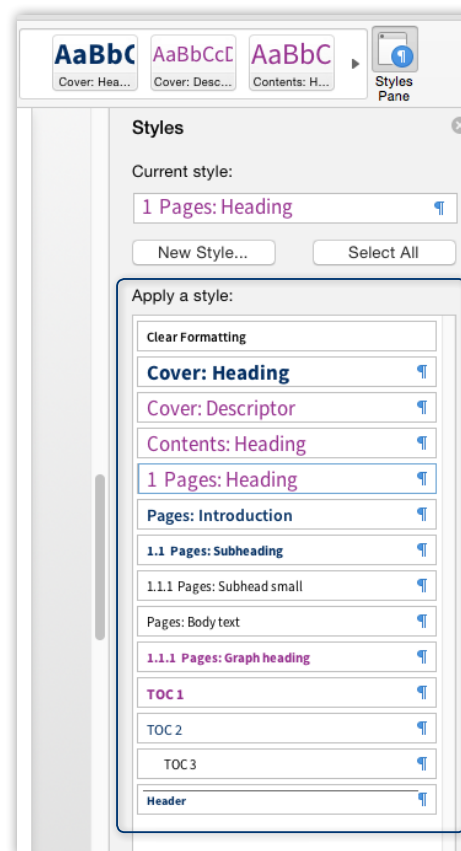
Colours



Please **only** use the Theme Colours within your Word document.

These are the Cochrane official colours and consist of a deliberately limited palette that ensures consistency across all reports produced.

Text styles

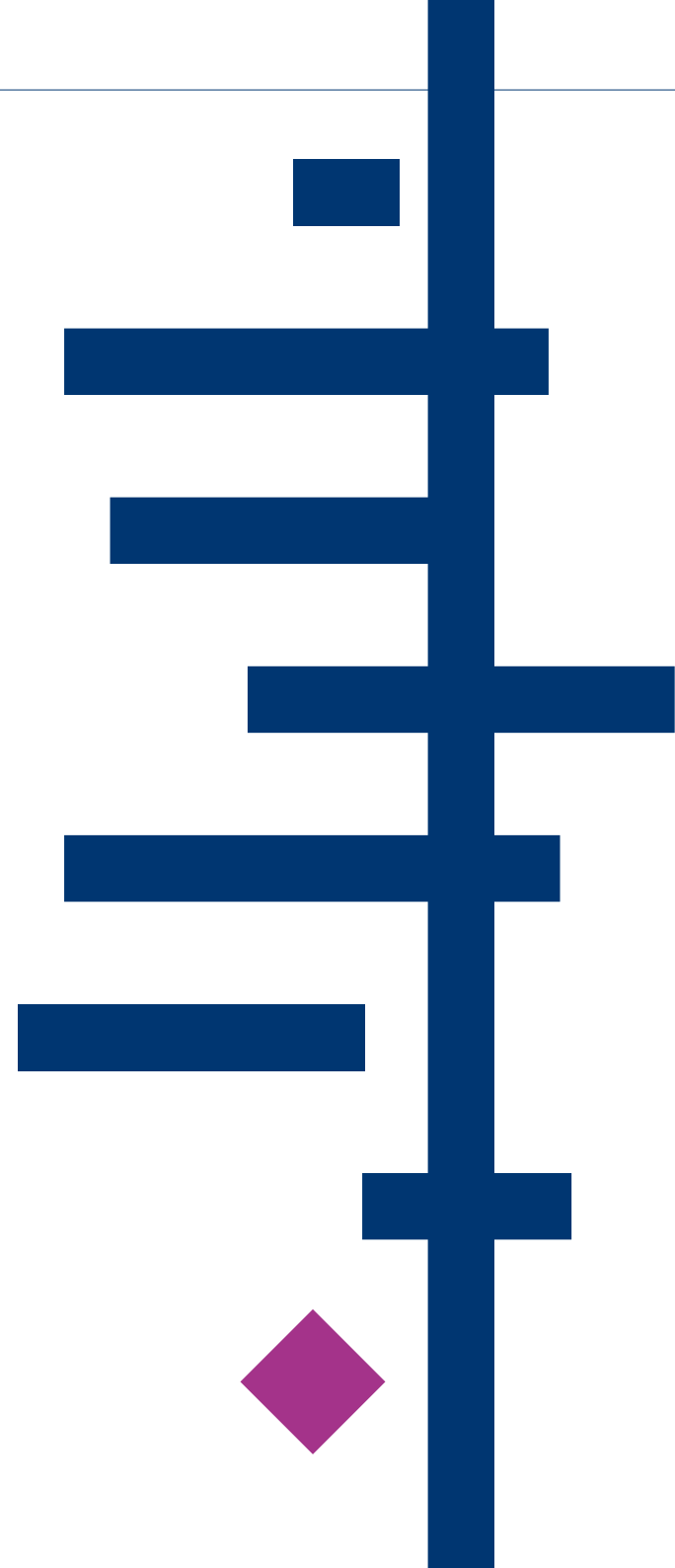


Text styles ensure consistency across documents and a range has been set up which should cover most needs for differentiation and hierarchy within a report.

These have been set up to ensure a document is easy to read and navigate, it is therefore important to use the pre-set styles wherever possible.

Formatting – simple & blank templates

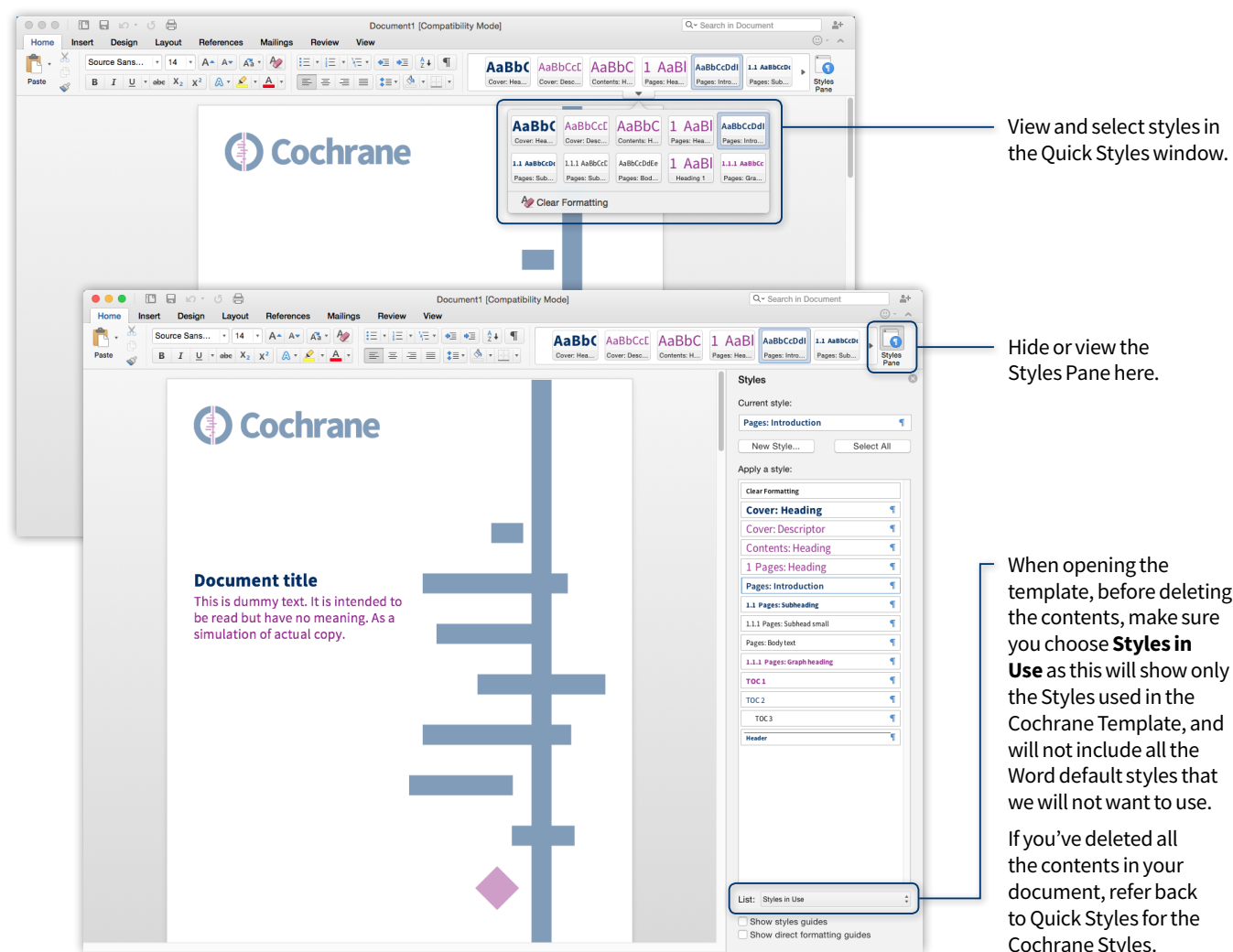
All the basic guidance on text, colour and layout.



Applying text Styles

Starting the text layout

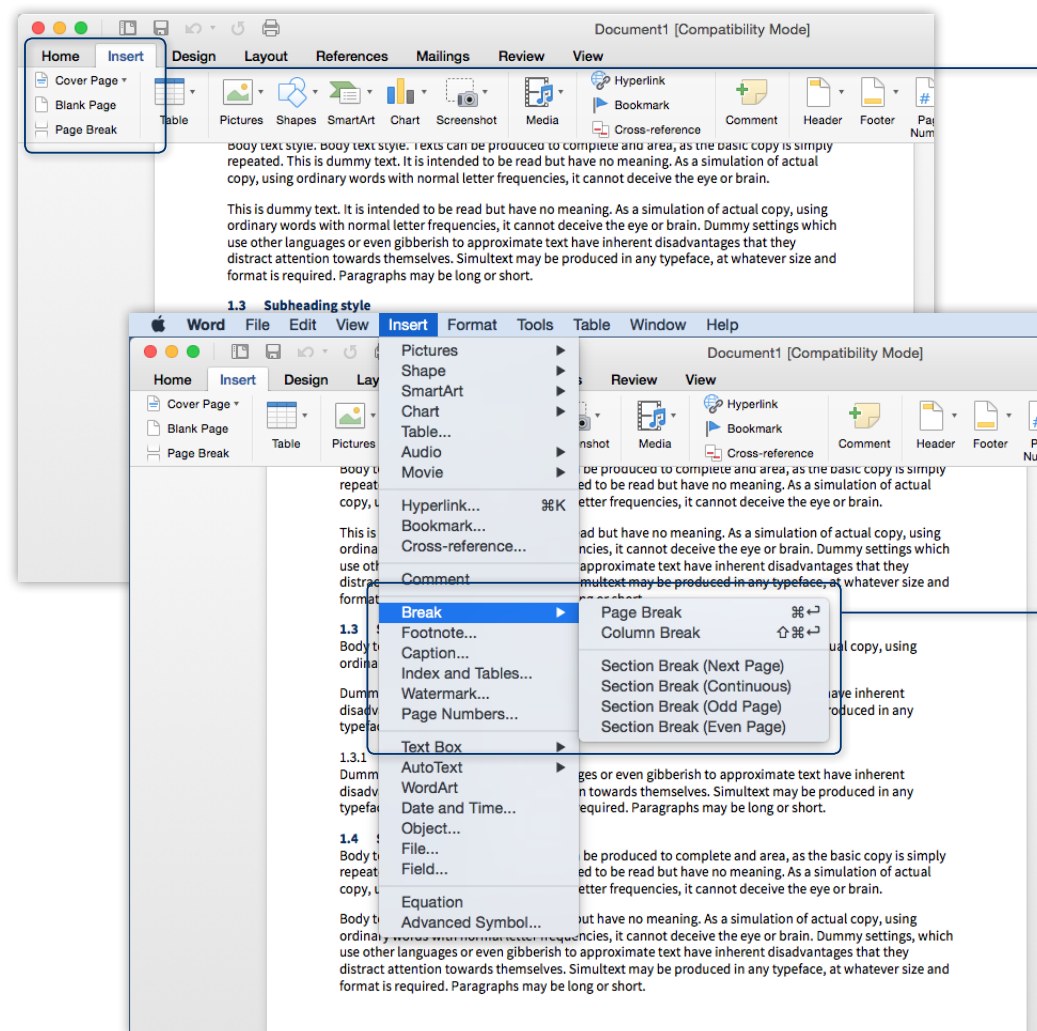
- You can choose to write directly into the template or copy and paste text from another document.
- Either way, it is important that the text is styled up using the Cochrane styles. These can be found in the Styles and Quick Styles palettes as illustrated on the right.
- All the styles will change the look of a whole paragraph of text. When changing a style, first click **Clear Formatting** then select the desired style for your highlighted paragraph of text.
- **Please note** that if you copy text from another document into the template, you will bring in Styles from that document. Please ensure you click **Clear Formatting** in your original document before copying and pasting any text into the Cochrane template. Then style up the copied text in the desired Cochrane Style.



Layout of text

Managing paragraphs and pages

- Word will automatically break onto a new page when the bottom margin of the page is reached. This can be mid sentence and/or mid-paragraph and not always the place you want a page break.
- However, you can insert a page break where you would like it ensuring your document reads well and looks right.
- The best way to do this is to place your cursor where you would like the break. Go to **Insert>Page break** and your next paragraph will start on the following page.
- This method is preferred to using multiple returns as it makes further editing easier to manage.



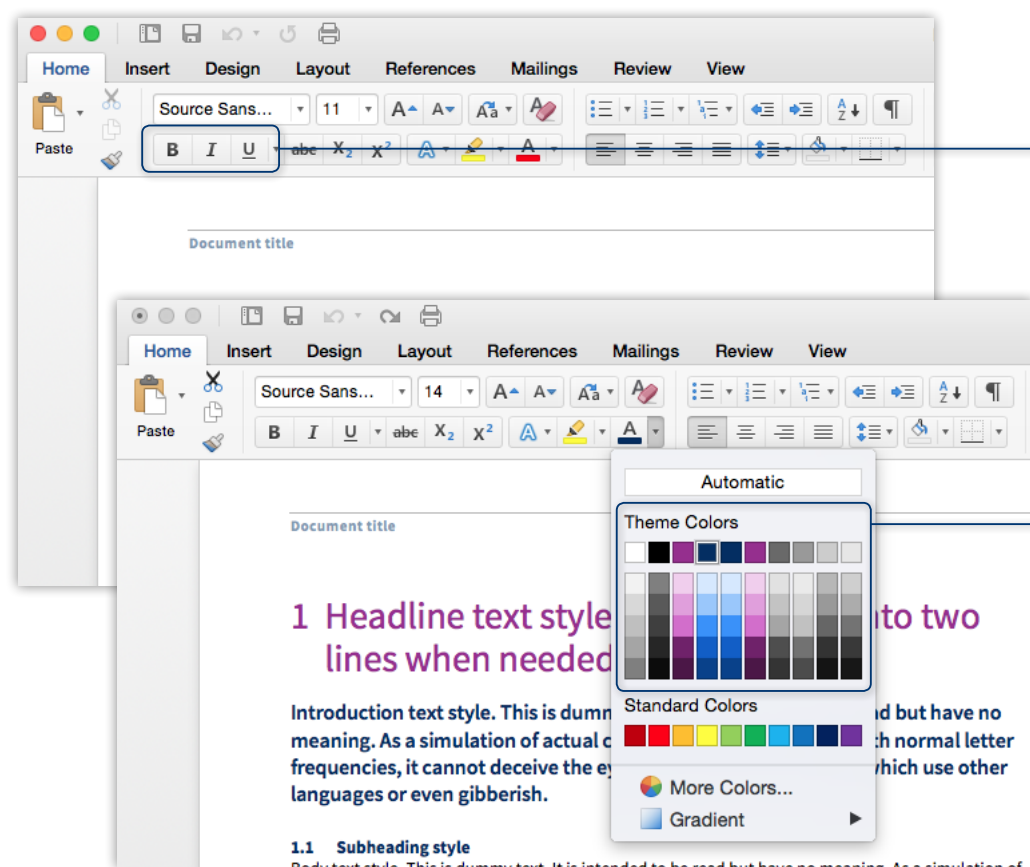
Insert Page Break
using the ribbon menu.

Insert Page Break
through the top menu.

Change text outside of Styles

Highlighting/changing text

- Sometimes it may be useful to change part of a paragraph to a different style. This can be done manually rather than through the use of Styles.
- Please ensure you use the same type size and when you have chosen your highlight style, be sure to use the same technique throughout your document. Try to keep the highlighting simple, by using Capitals, Bold, Italic or Underline and maybe a colour to differentiate.
- Avoid using shadows and other 3D effects as this does not aid legibility. Also, always ensure you only use colours from the Cochrane Theme Colours.



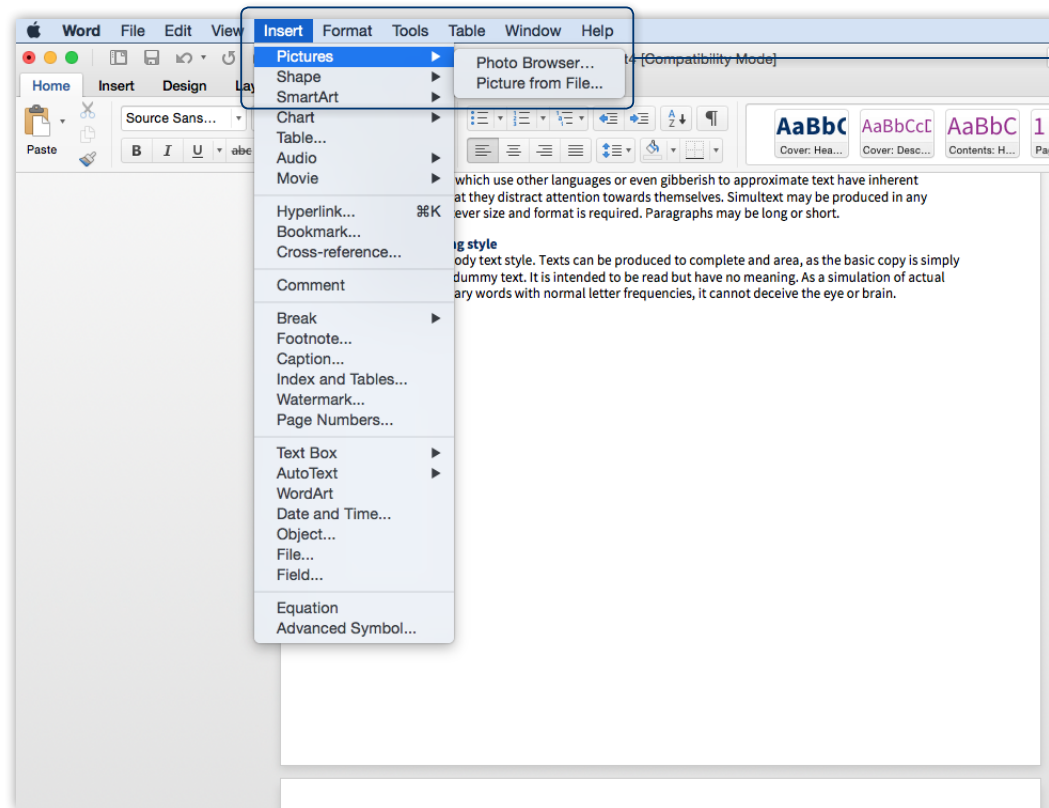
Use Bold, Italic and Underline to highlight text within paragraphs.

If using colour to highlight text, make sure it is from the Cochrane Theme Colours.

How to insert an image

Insert an image in line with text

- When inserting an image into the word document, place the cursor where you would like the picture to go.
- Go to **Insert>Pictures>Picture from File** and choose the image you would like to insert.



Insert picture
from file.

How to edit graphs and charts

Using the template graphs and charts

- When including data in form of a graph or a chart, it would be preferable, if at all possible to use one of the template charts.
- In order to edit the graph/chart, select the graph/chart and right click. Select **Edit data in Excel** and the graph/chart will open in Excel where it is fully editable.

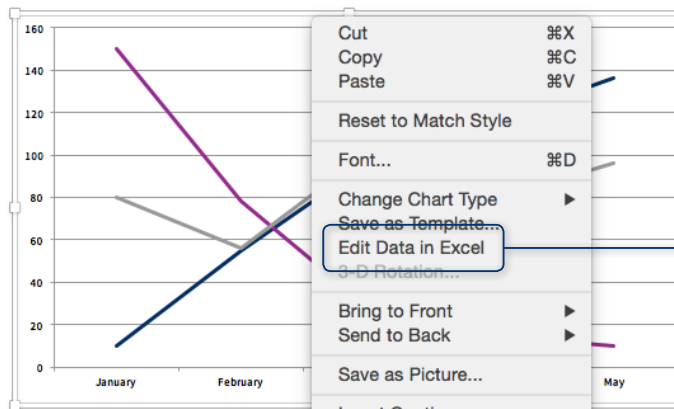
2 Graph/chart styling

2.1 Sub-head style

Body text style. This is dummy text. It is intended to be read but have no meaning. As a simulation of actual copy, using ordinary words with normal letter frequencies.

Body text style. It is intended to be read but have no meaning. As a simulation of actual copy, using ordinary words with normal letter frequencies, it cannot deceive the eye or brain. Dummy settings, which use other languages or even gibberish to approximate text have inherent disadvantages that they distract attention towards themselves. Simultext may be produced in any typeface, at whatever size and format is required. Paragraphs may be long or short.

2.1.1 Graph heading



Body text style. It is intended to be read but have no meaning. As a simulation of actual copy, using ordinary words with normal letter frequencies, it cannot deceive the eye or brain. Dummy settings, which use other languages or even gibberish to approximate text have inherent disadvantages that they distract attention towards themselves. Simultext may be produced in any typeface, at whatever size and format is required. Paragraphs may be long or short.

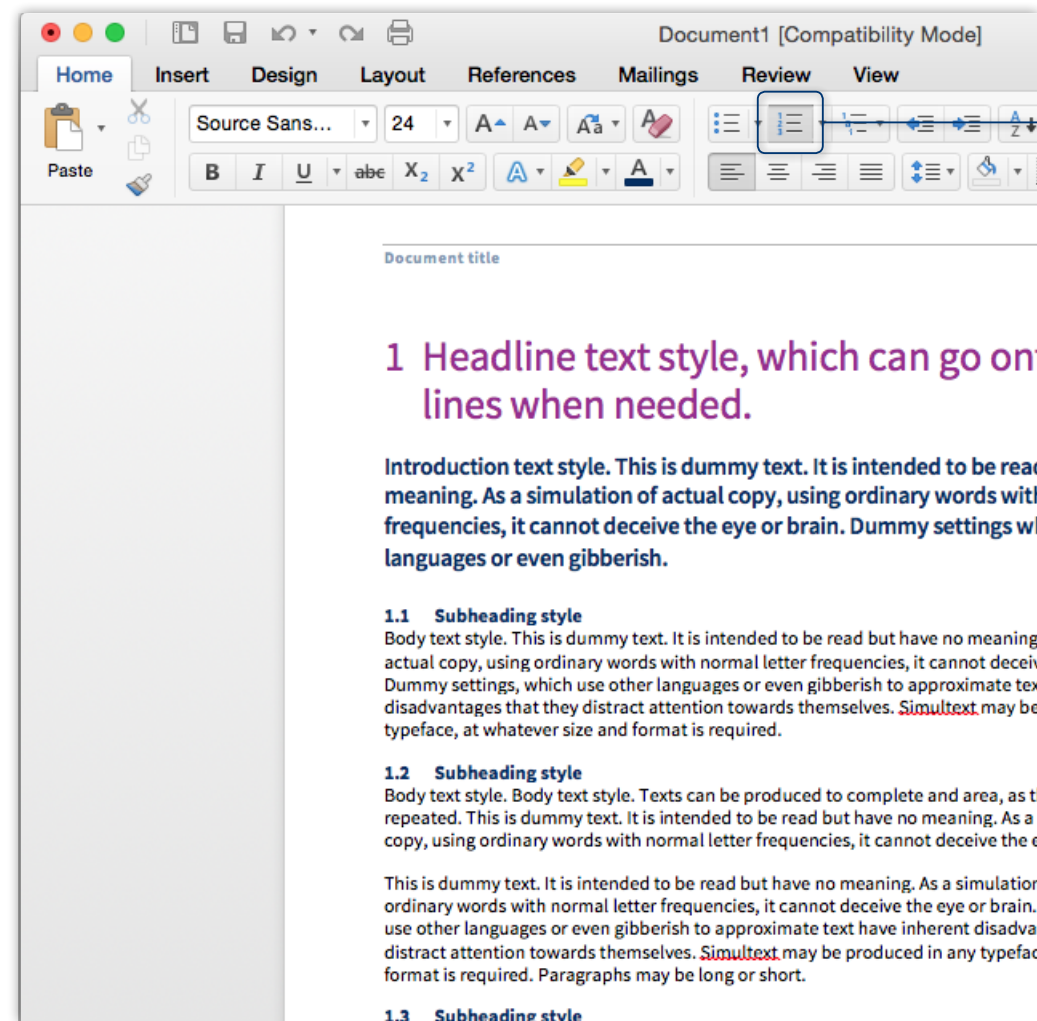
Body text style. It is intended to be read but have no meaning. As a simulation of actual copy, using ordinary words with normal letter frequencies, it cannot deceive the eye or brain. Dummy settings, which use other languages or even gibberish to approximate text have inherent disadvantages that they distract attention towards themselves. Simultext may be produced in any typeface, at whatever size and format is required. Paragraphs may be long or short.

Right-click (or Control-click for Mac users) on the selected graph and the menu appears.

How to use section numbers

De-selecting numbering of sections

- All the headline Styles in the Template are set up to use section numbering. These should work automatically throughout the document. If you would prefer not to have your sections numbered, you can click on the headline and de-select the numbering option at the top menu as shown on the right.

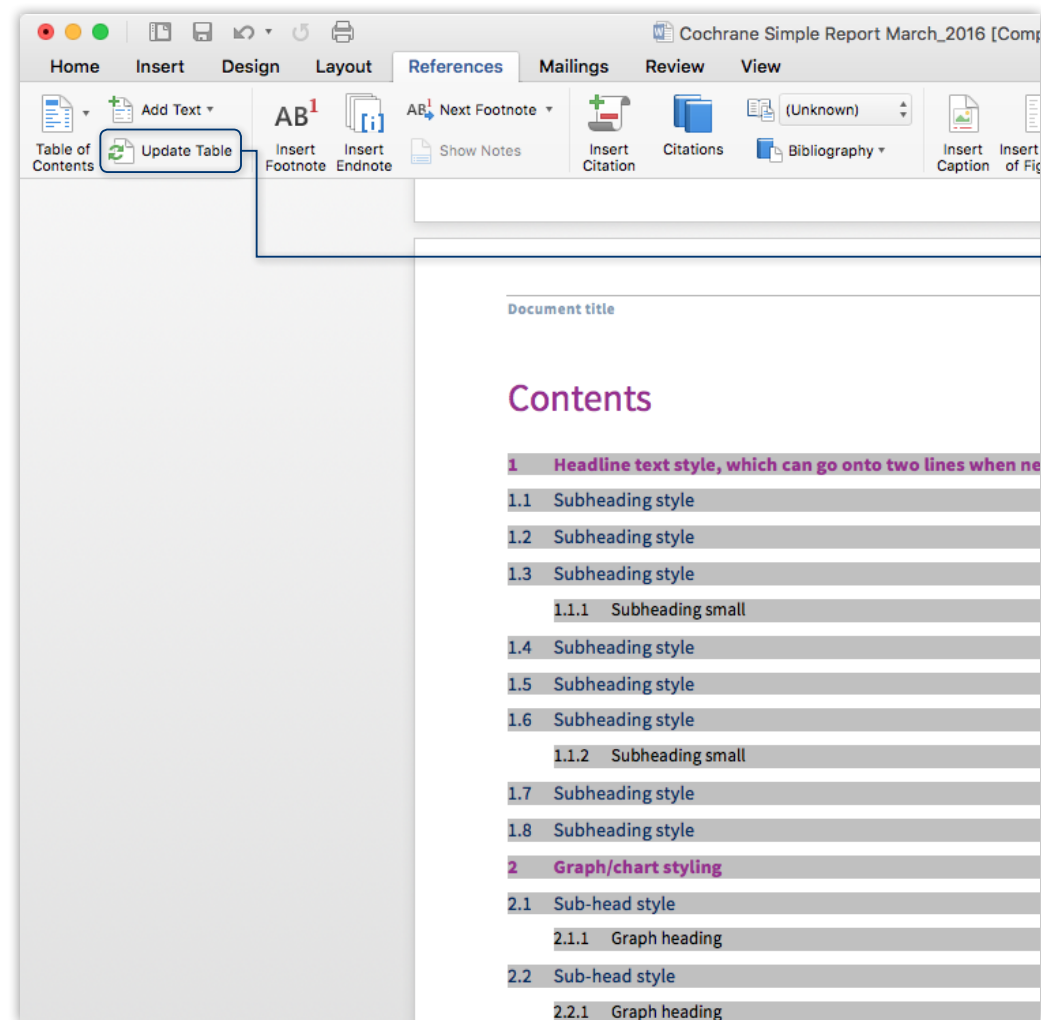


Click once on the numbering button to de-select numbering of headings.

How to use the automated contents

Updating the contents

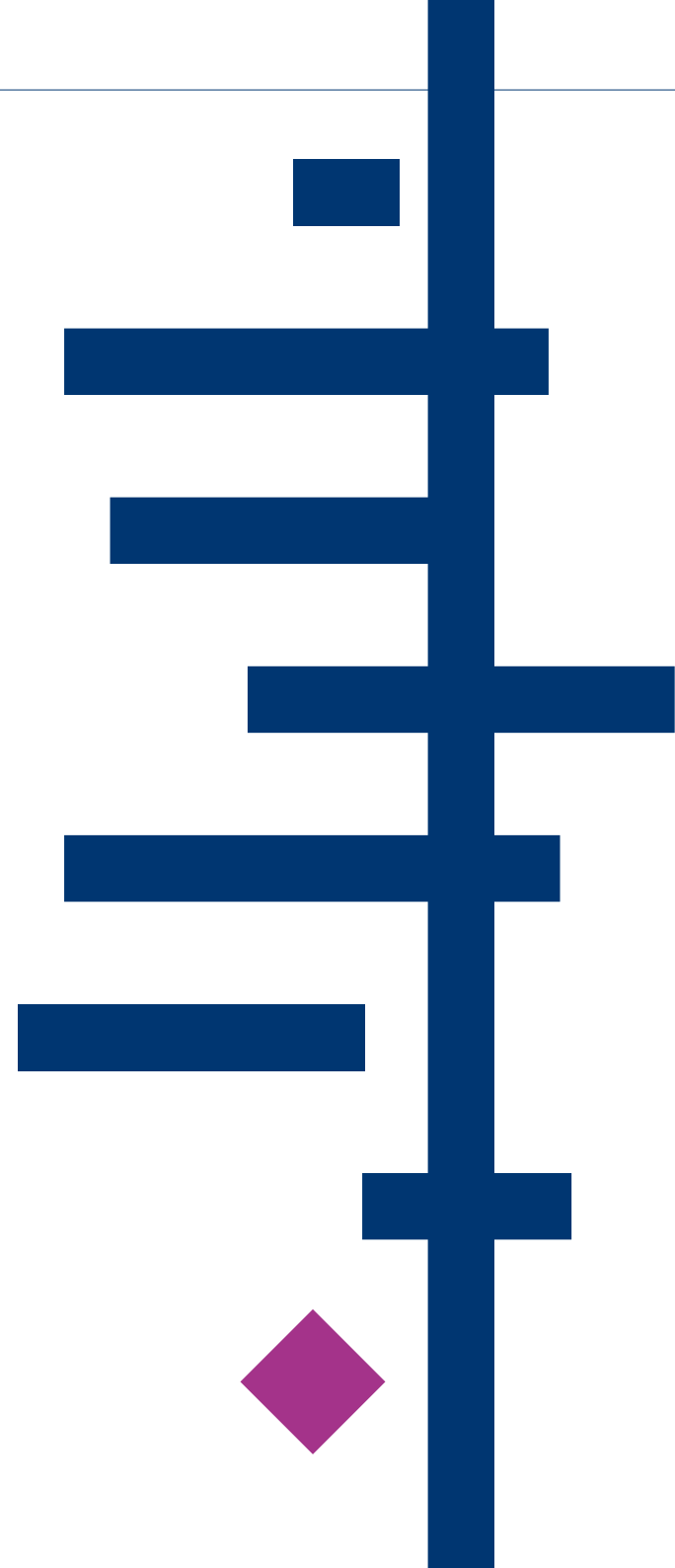
- In order to update the contents once you have added additional text, place your cursor within the contents text, go to the 'References' tab and then click on the 'Update Table' button. You will be given two options, either to update just the page numbers or update the whole table.



Click 'update table' in order to update the contents.

Formatting – complex template

Guidance on the additional features
included in the complex template



Additional Styles in complex template

Styles and features

- There are three additional text Styles in the complex template; Bullet point, Highlighted text and Table subheading style.
- There are in addition to this the option to add a text box and a table as shown.

1.4 Subheading style

Body text style. This is dummy text. It is intended to be read but have no meaning. As a simulation of actual copy, using ordinary words with normal letter frequencies, it cannot deceive the eye or brain. Dummy settings, which use other languages or even gibberish to approximate text have inherent disadvantages that they distract attention towards themselves. Simultext may be produced in any typeface, at whatever size and format is required.

- Bullet point style.
- Texts can be produced to complete and area, as the basic copy is simply repeated.
- This is dummy text. It is intended to be read but have no meaning.

Bullet point style.

This is dummy text. It is intended to be read but have no meaning. As a simulation of actual copy, using ordinary words with normal letter frequencies, it cannot deceive the eye or brain. Dummy settings, which use other languages or even gibberish to approximate text have inherent disadvantages that they distract attention towards themselves. Simultext may be produced in any typeface, at whatever size and format is required. Paragraphs may be long or short.

Highlighted text style. It is intended to be read but have no meaning. As a simulation of actual copy, using ordinary words with normal letter frequencies, it cannot deceive the eye or brain.

Highlighted text style.

This is dummy text. It is intended to be read but have no meaning. As a simulation of actual copy, using ordinary words with normal letter frequencies, it cannot deceive the eye or brain. Dummy settings which use other languages or even gibberish to approximate text have inherent disadvantages that they distract attention towards themselves. Simultext may be produced in any typeface, at whatever size and format is required. Paragraphs may be long or short.

Text box style. It is intended to be read but have no meaning. As a simulation of actual copy, using ordinary words wit normal letter frequencies, it cannot deceive the eye or brain

Text box style.

Body text style. It is intended to be read but have no meaning. As a simulation of actual copy, using ordinary words with normal letter frequencies, it cannot deceive the eye or brain. Dummy settings, which use other languages or even gibberish to approximate text have inherent disadvantages that they distract attention towards themselves. Simultext may be produced in any typeface, at whatever size and format is required. Paragraphs may be long or short.

1.5.1 Table Heading

East	West	North	South
123	456	789	123
4567	8901	2345	6789
12345	67890	23456	78901

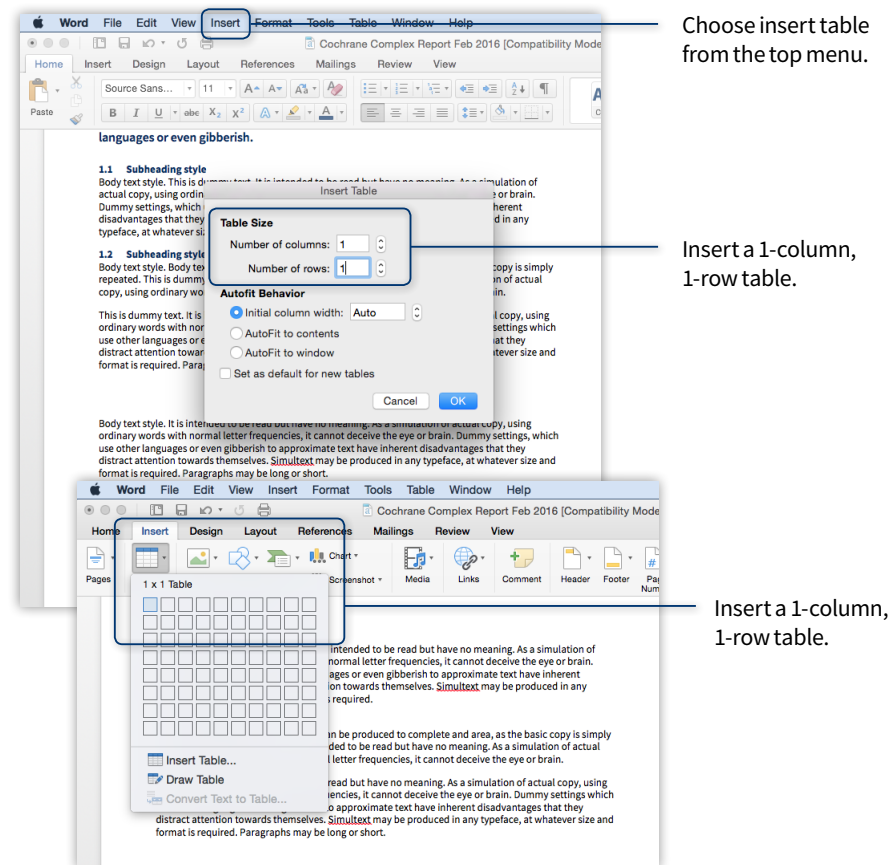
Table subheading and table style.

Body text style. It is intended to be read but have no meaning. As a simulation of actual copy, using ordinary words with normal letter frequencies, it cannot deceive the eye or brain. Dummy settings, which use other languages or even gibberish to approximate text have inherent disadvantages that they distract attention towards themselves. Simultext may be produced in any typeface, at whatever size and format is required. Paragraphs may be long or short.

How to insert a text box

The text box is a one-cell table

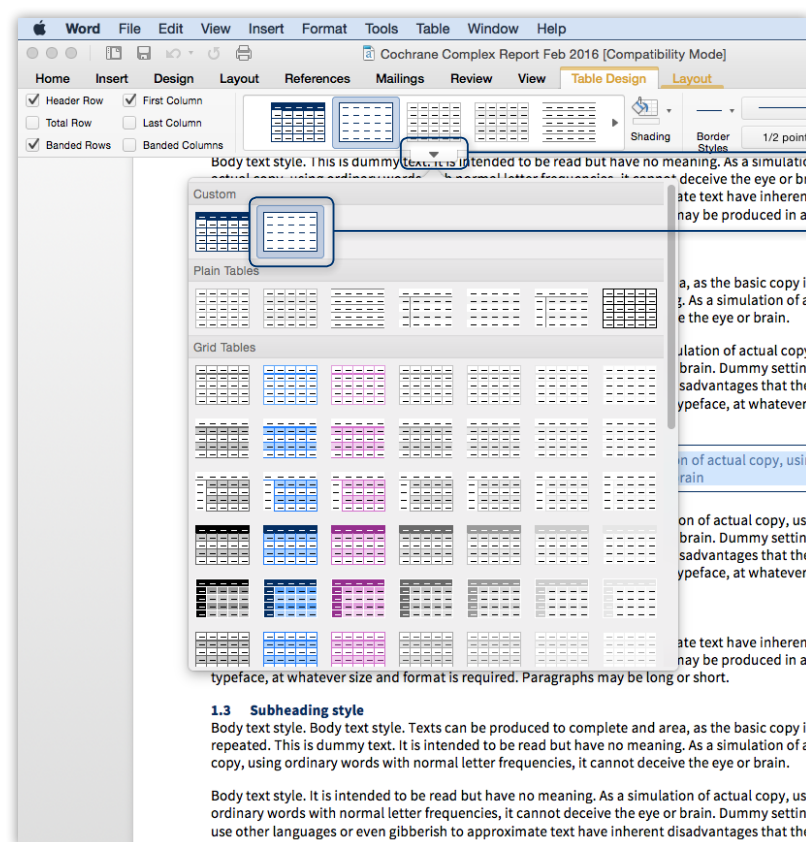
- The easiest way to insert a text box in line with the body copy text is to insert a 1-column, 1-cell table.
- Go to **Insert>Table** either in the top menu or in the top ribbon. Create a 1-column, 1-row table as illustrated on the right.



How to style up a text box

Choosing the Cochrane style a text box

- Once you've inserted the text box (table), and inserted your copy, you need to style it up in the Cochrane style.
- Highlight the text box and click on Table Design in the ribbon menu. Two custom styles appear in the table menu. When hovering the mouse over, you will see the name of the styles. Choose 'Pages: Text box'.
- If it looks like there is too much space at the bottom of your text box, highlight the text and click 'clear formatting' in the Styles pane.



Click on the arrow to open the full menu.

Choose the style 'Pages: Text box'.

How to use insert a table

Inserting a table in line with text

- Go to **Insert>Table** either in the top menu or in the top ribbon. Create a table, setting the columns and rows to suit your needs.

Choose insert table from the top menu.

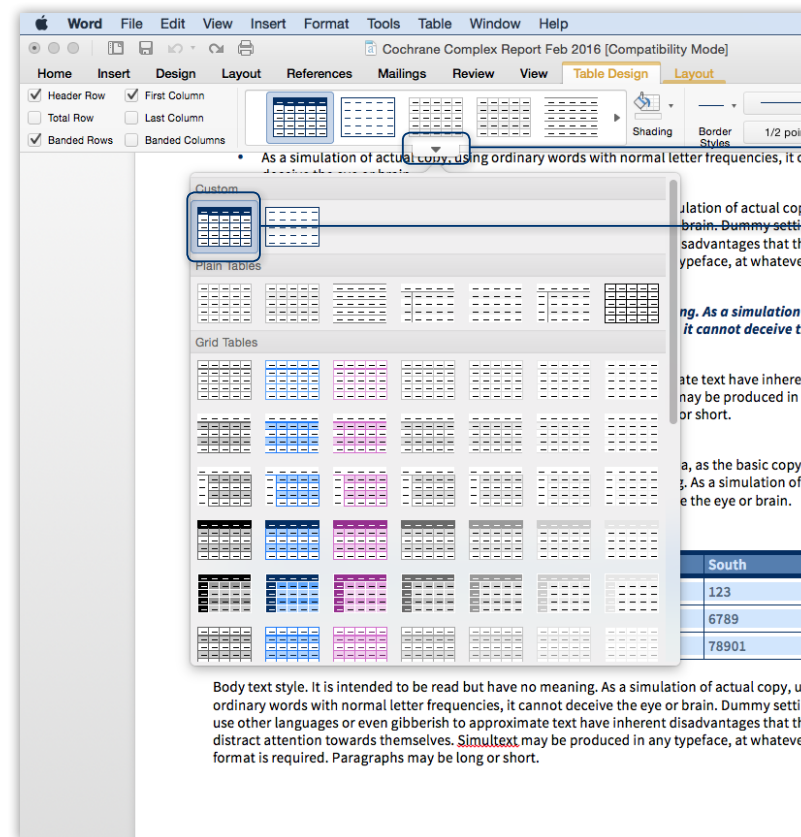
Set the number for columns and rows.

Pick squares according to the required columns and rows.

How to style up a table

Choosing the Cochrane style a table

- Once you've inserted the table, and inserted your copy, you need to style it up in the Cochrane style.
- Highlight the table and click on Table Design in the ribbon menu. Two custom styles appear in the table menu. When hovering the mouse over, you will see the name of the styles. Choose 'Pages: Table Style'.



Click on the arrow to open the full menu.

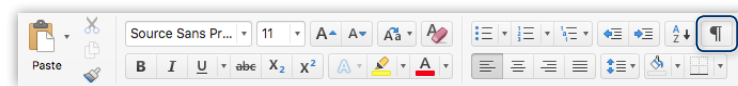
Choose the style 'Pages: Table Style'.

How to insert a divider page

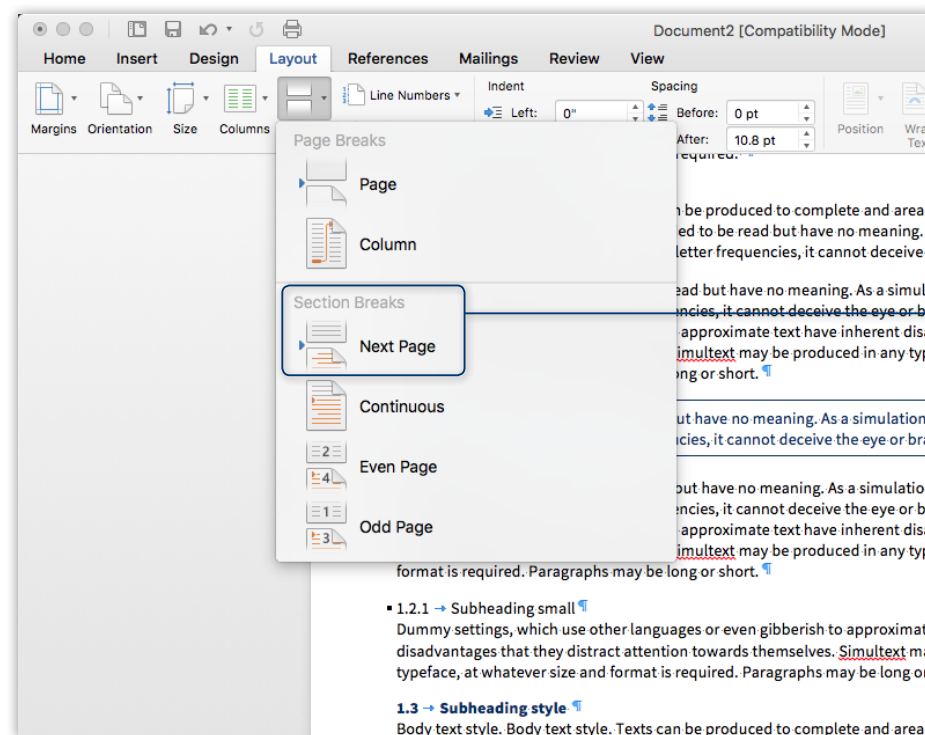
Create a new section for your divider

- Ensure you can see section breaks and returns.
- In order to add a divider page, firstly place the cursor at the bottom of the page before where you want to place your Divider. Go to the 'Layout' tab and click on the 'Breaks' button. Select 'Section breaks, Next page'. You should now have a blank page with just the Document title and folio in the header.

...continues on the next page



Click to show non-printing items such as section breaks and returns.

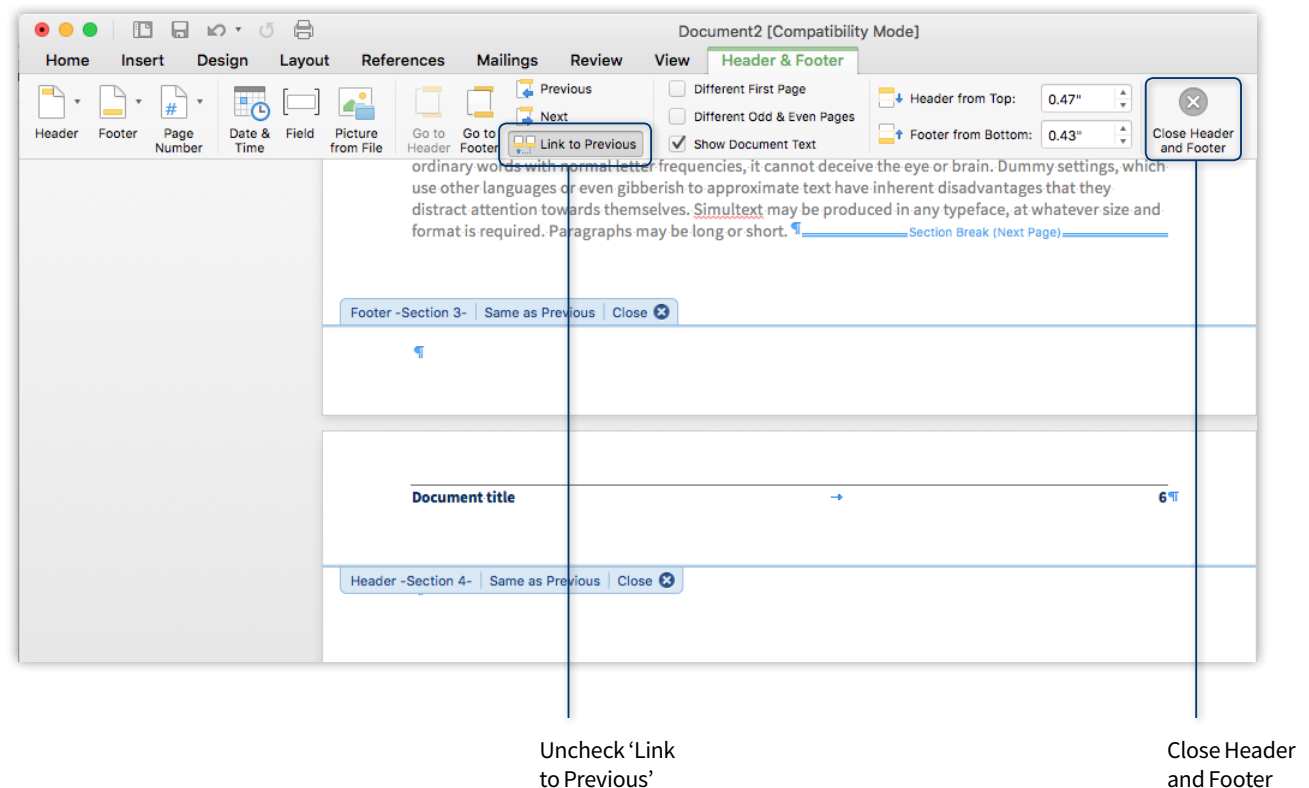


Section Breaks, Next Page

How to insert a divider page

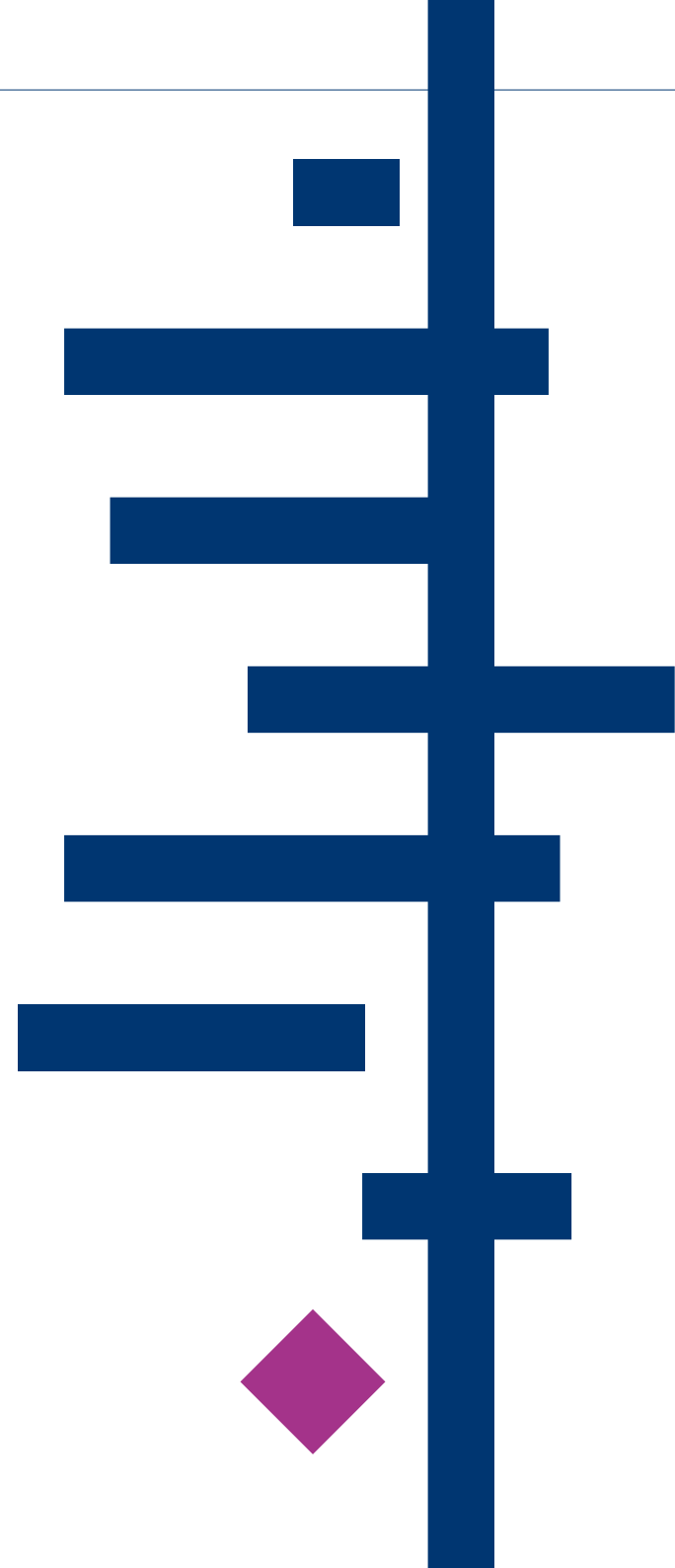
Inserting the divider into your new section

- Open the Header by double clicking in the area of the Header. Once open, you need to unlink the Header from previous pages. To do this click on the “Header & Footer” tab and uncheck the ‘Link to Previous’ checkbox. Go back to the page and delete the contents of the header and change the style for the carriage return you can see to ‘Pages: body text. Then click on the Close Header button.
- You can now go to the master divider page within the template file and select all of the text including the carriage return before the heading as well as the Section break under the intro text. Navigate to your blank page, place the cursor at the top of the page and paste text. This should place all of the contents from the divider page on to the blank page, including the background image. You can now update the text as appropriate.



Saving and distributing a report

The best way to save your file before distributing



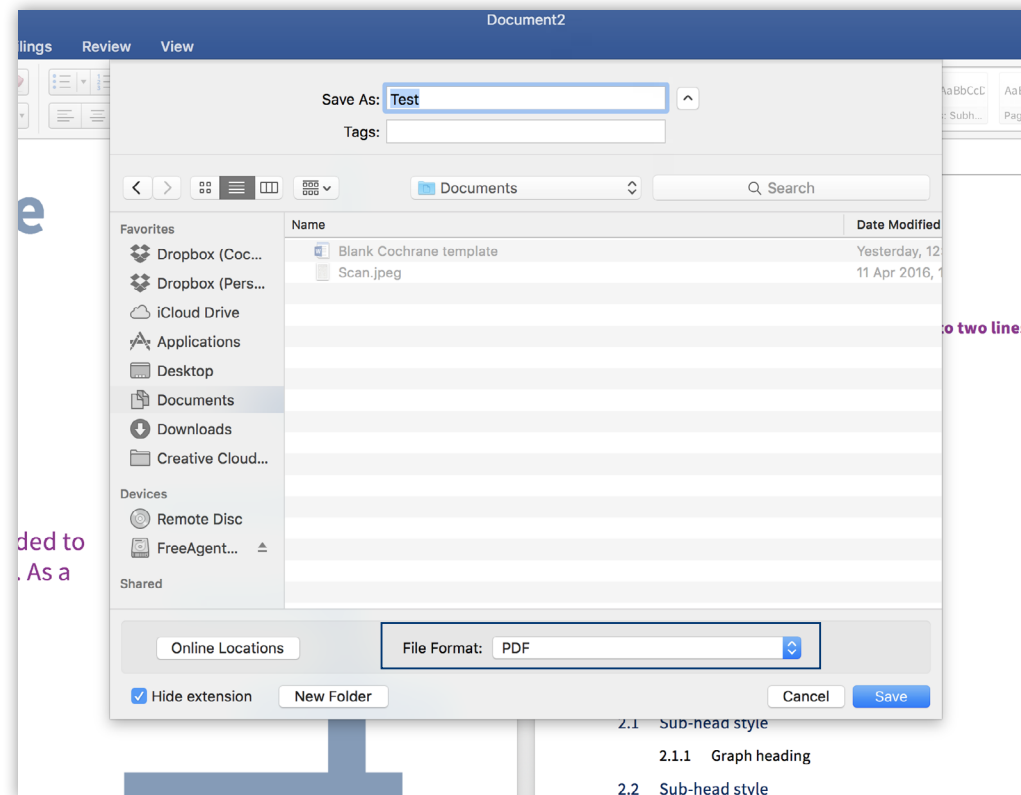
How to save and distribute a finished report

To save your document to make sure the Cochrane font - Source Sans Pro stays embedded, you have the following options:

For MAC users - saving as a PDF:

To make sure the font stays embedded within your document save your document as a PDF.

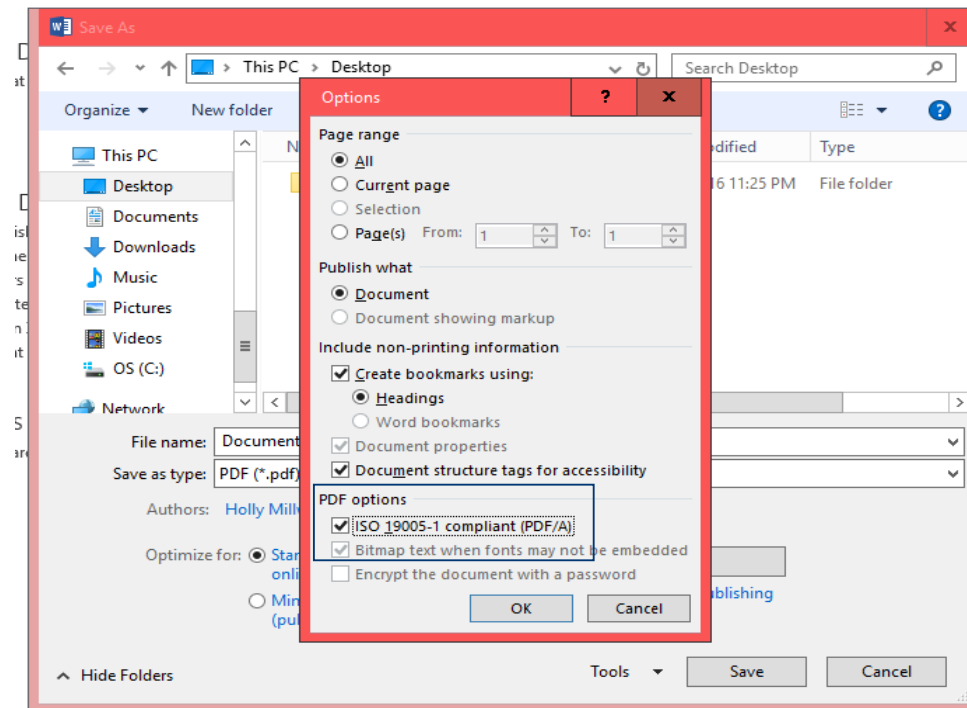
This will stop the font being replaced with another. This can happen if other users don't have Source Sans Pro saved on their computer.



How to save and distribute a finished report

For PC users - saving as a PDF:

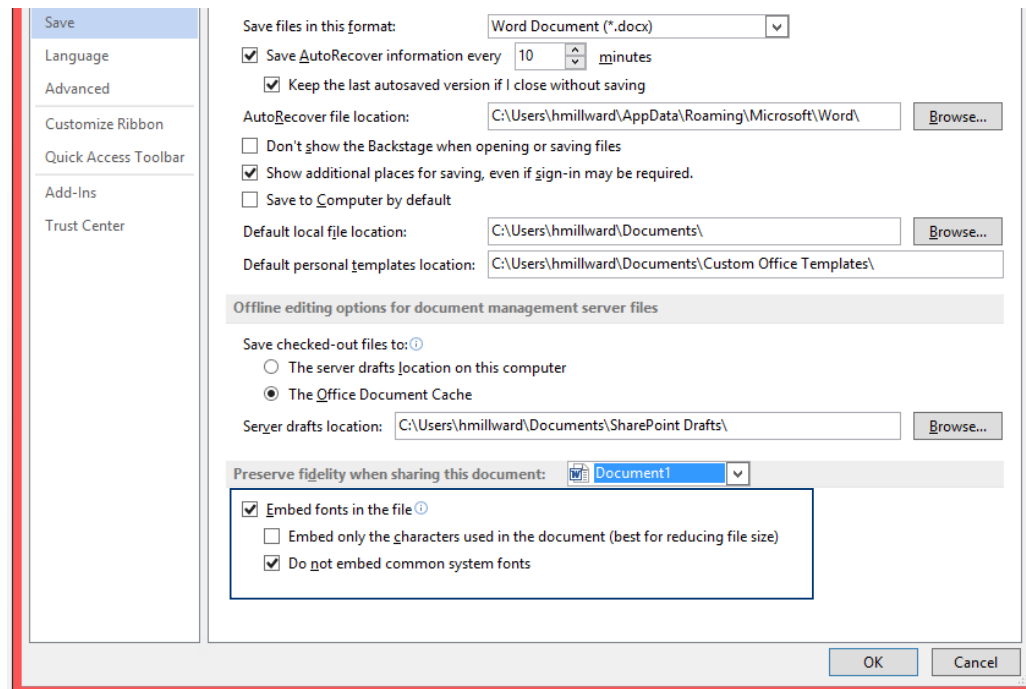
1. 'Save as' a 'PDF'
2. Before you select 'Save' go to 'Options'
3. Tick 'ISO 19005-1 compliant (PDF/A)' or 'Creat PDF/A-1a:2005 compliant file' option
4. Then select 'OK' and 'Save'



How to save and distribute a finished report

For PC users - saving as a Word file with embedded fonts:

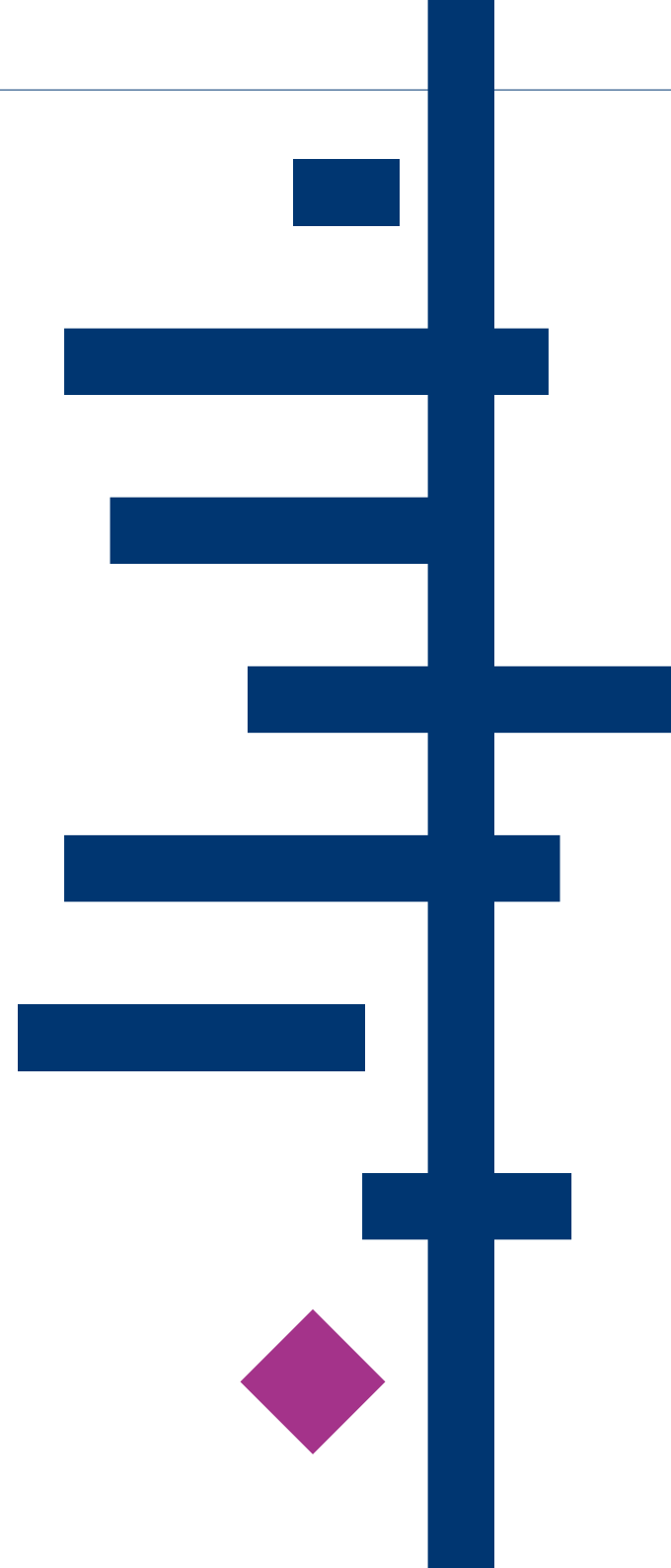
1. Go to 'File' then 'Options'
2. Go to 'Save' and select 'Embed fonts in file' and 'Do not embed common system fonts'
3. You can then 'Save' your file as normal and the fonts will stay embedded.



Report covers

If you would like a different cover design for your report, you can insert it after the document has been converted to an Adobe Acrobat PDF.

If you would like a cover design with an image, you will need to insert the image first in MS Word and then covert it to a PDF for insertion into the main report.



Choosing an alternative cover design

Pick one of the 7 alternative covers

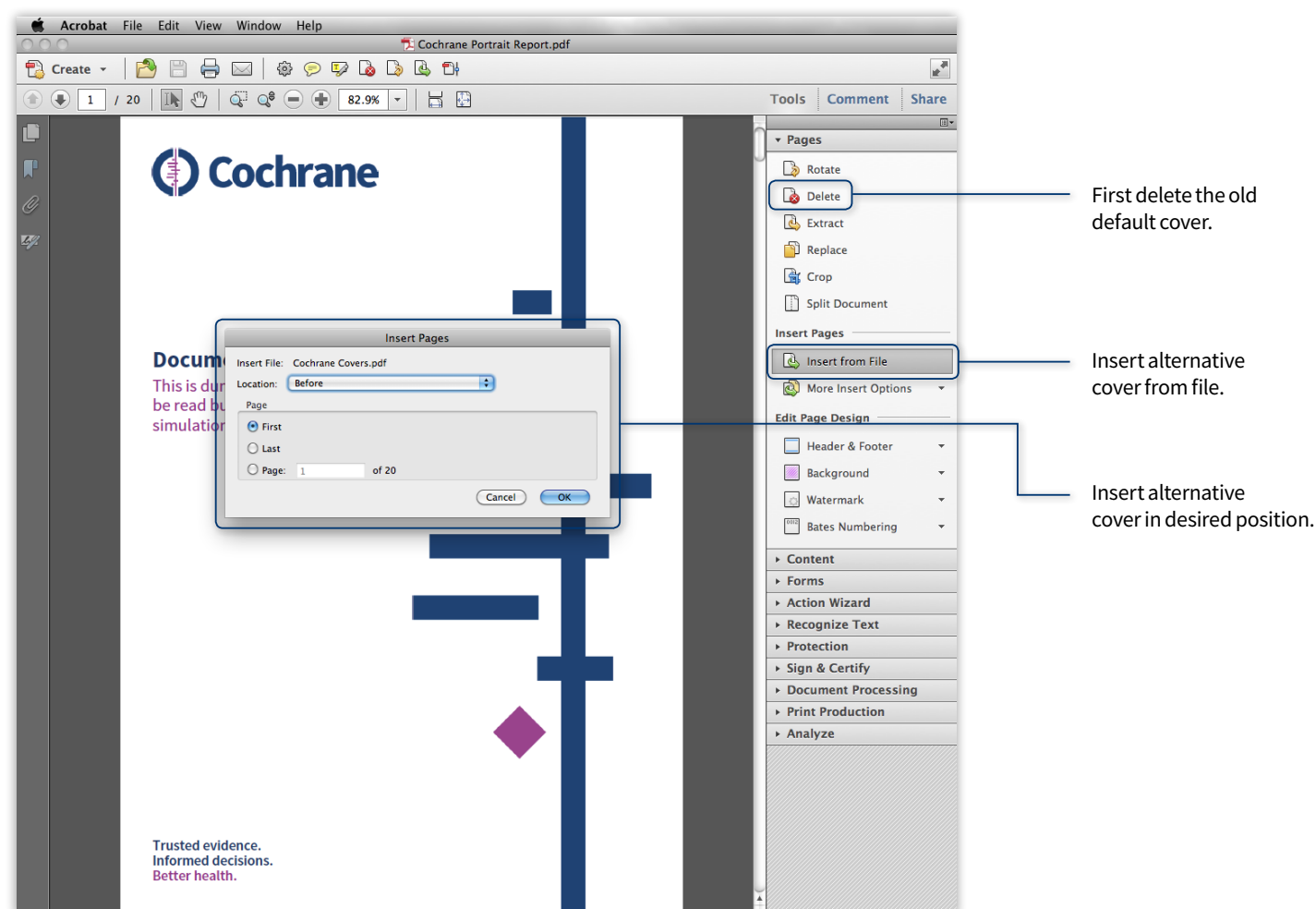
- We have created a Word Template containing 7 alternative cover designs – all shown here. Some accommodate pictures, others will just need the document title and description filling in.
- Pick a design that suits your report and delete the rest. Insert the relevant information and once finished, save the file out as a PDF.



How to change the cover

How to change the cover in Acrobat

- Once you're happy with the chosen cover, save the file out as a PDF.
- Open your main report in Adobe Acrobat (Acrobat Professional is required for this step) and choose **View>Tools>Pages**
- A menu will appear. First choose **Delete pages** and delete the covers you don't want. Then choose **Insert pages>Insert from file**. Choose your saved file and a pop-up with insertion options appear. Choose Insert before first as shown here.
- Save your PDF and your report is ready to distribute.



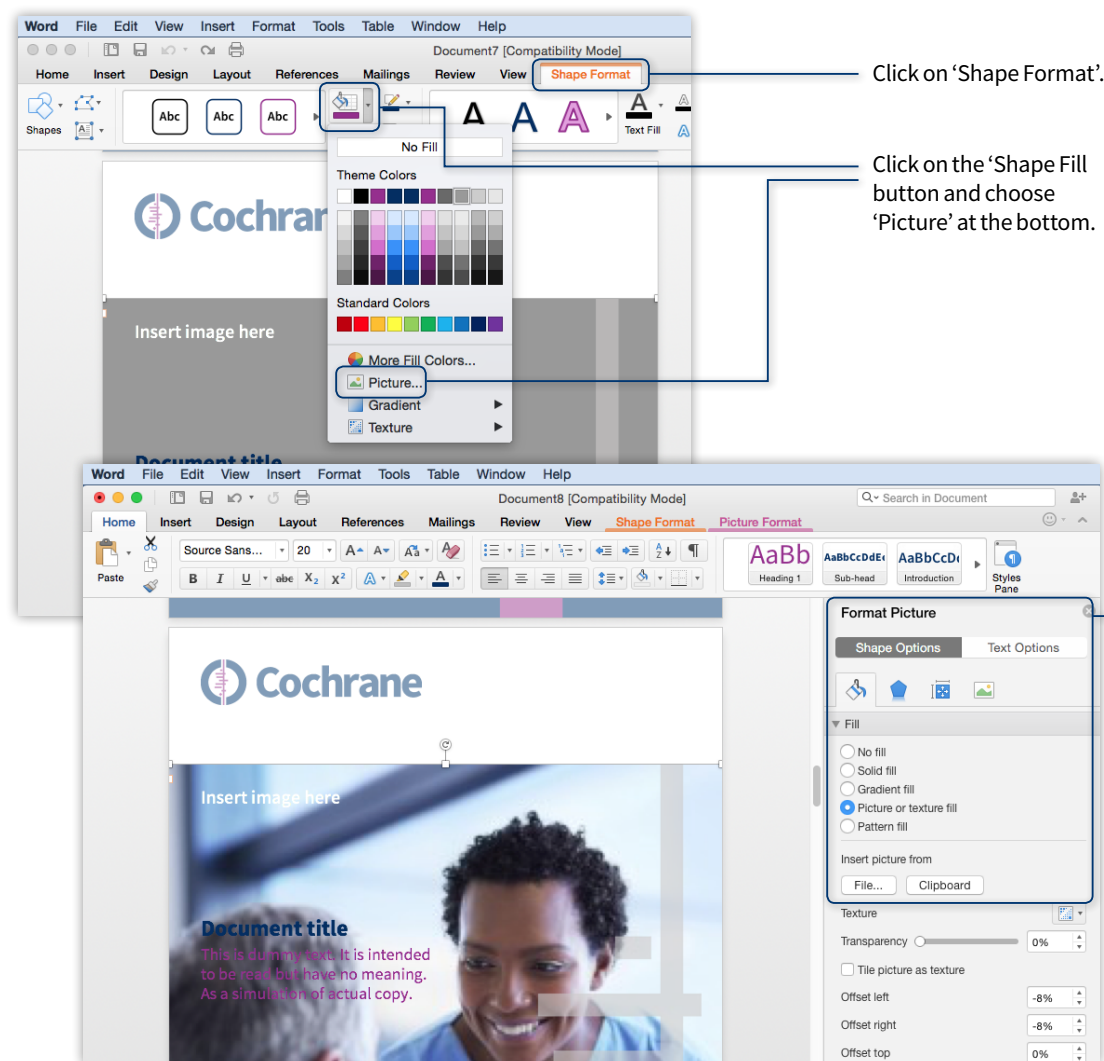
How to insert an image into a cover design

How to insert an image into a grey box

- If you would like a cover design with an image, you will need to insert the image first in MS Word and then convert it to a PDF for insertion into the main report.
- Click on the grey box and choose Format>Shape from the top menu or 'Shape Format' from the ribbon menu.
- Then select the 'Picture' or 'Picture and texture' in either of the menus
- You may need to 'Format Shape' and adjust the width and height of the image as the box can distort the dimensions.
- Once you are happy with your image, follow the instructions on page 30 to update your report with your chosen cover design.

How to add in your logo

- Double click on the page header. Right click on the logo and select 'change image'.
- Find your logo and add either the PNG or JPEG file. This will swap the logo.



Questions

If you have any questions regarding
the Word templates, please contact
hmillward@cochrane.org

