



HEART OF POSITIVE AGEING

# Microsoft Office Template Guide

Applying our brand to internal documents and presentations  
September 2024

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# Word templates

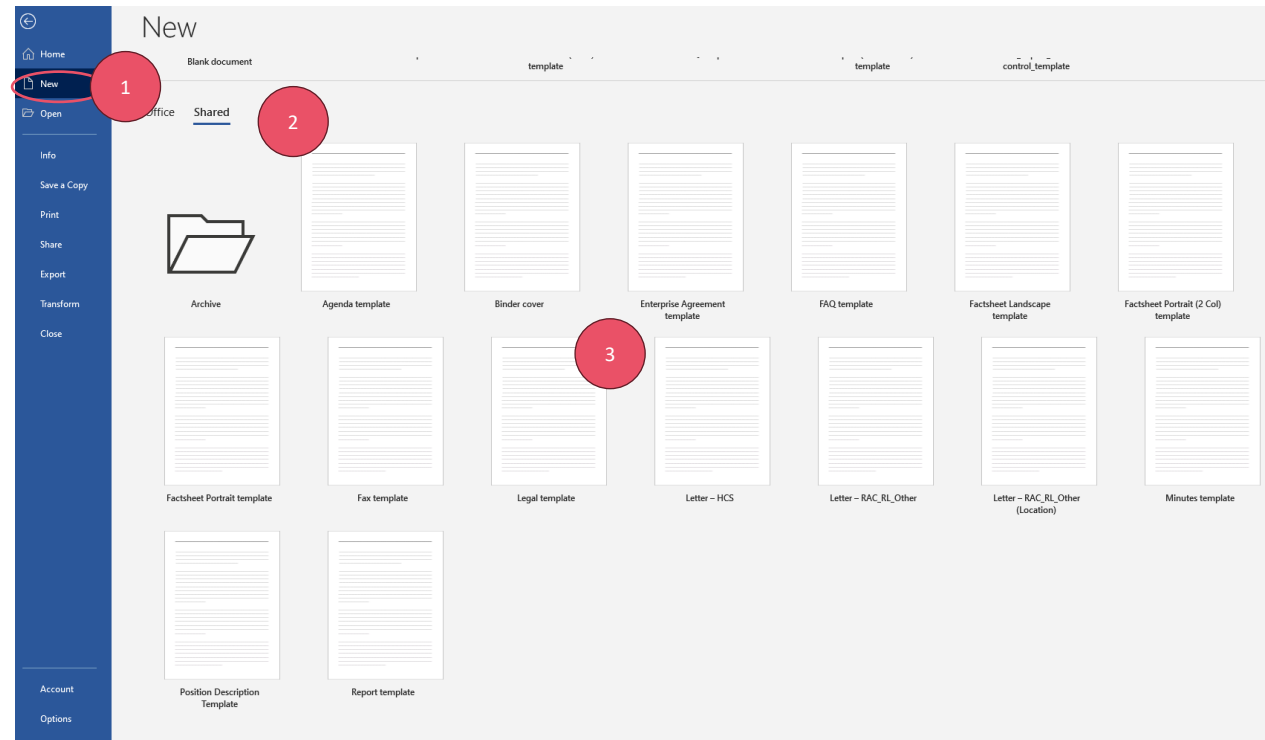
## Available templates include

- Agenda
- Binder cover
- FAQ sheet
- Factsheet Landscape
- Factsheet Portrait
- Factsheet Portrait 2 column
- Fax
- Letter – HCS
- Letter – RAC-RL\_Other
- Letter – RAC\_RL\_Other (Location)
- Minutes
- Report

Letter templates are based on the Business ABN details for that area of the business.

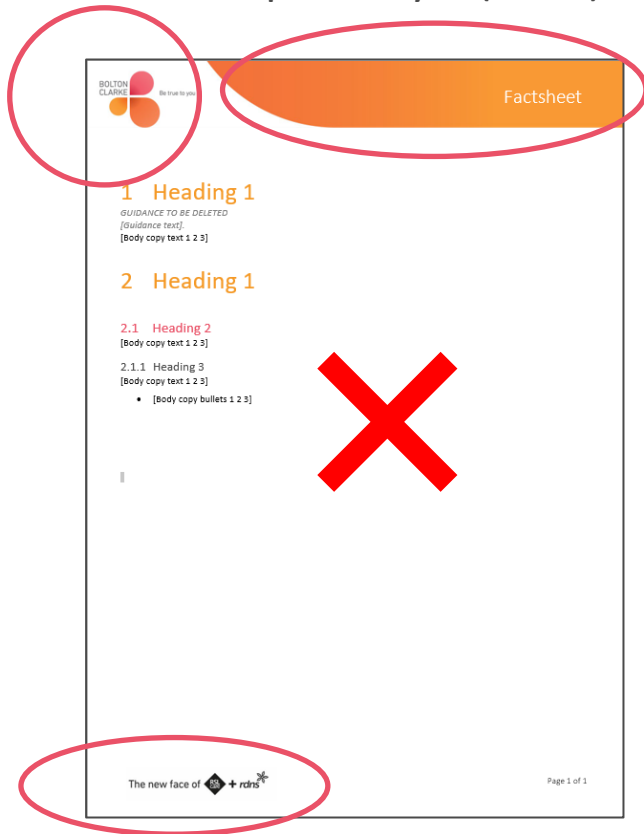
## Accessing the templates

1. In Word, click **File > New**
2. Click the **Shared** tab to view Bolton Clarke templates.
3. Click a template to open a new document based on that template. Please do not click on the templates that are Pinned at the top of the screen as these could be out of date.

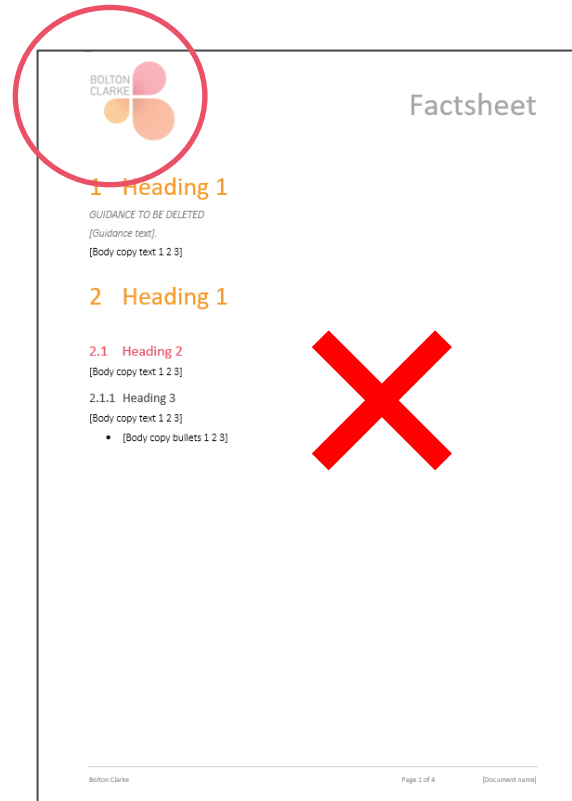


# Word templates

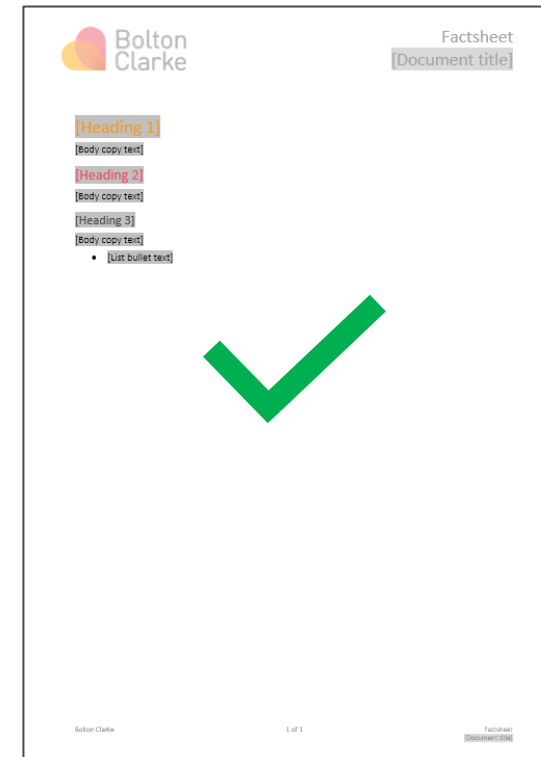
Old template style (2017)



Old template style (2019)



NEW template style 2024



If your document is displaying the **orange curve**, **old BC logo** or **The new face of RSLCare + RDNS** it is on an old template and needs to be transferred to the latest template.

# Word templates

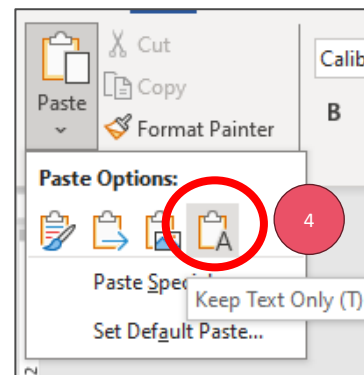
The Bolton Clarke Word templates are set up to help you create professional documents that align with our visual identity. This guide will show you tips and tricks to format and style your documents.

## Which template should I use?

- Many documents are built from changing minor details in existing templates.
- The Factsheet templates are designed to give you flexibility to create almost any new document.
- Go into the Header – double click on ‘Factsheet’ – edit the header with the new template name or delete altogether. This will automatically update the footer.

## How to transfer an existing document into a template

1. Select ALL of the content on the old document (Ctrl+Shift+A) and copy (Ctrl+Shift+C)
2. Open the template you would like to use
3. Delete all placeholder and guide text from the template
4. Paste into the template as **‘Keep Text Only’** (unformatted).



# Word templates

The Word templates contain preset formatting based on Bolton Clarke branding.

The formatting can be applied to

- text and headings
- tables
- inserted shapes
- charts.

The screenshot shows the Microsoft Word ribbon with the following sections:

- Theme Styles:** A grid of color-coded text boxes (e.g., blue, red, orange, grey).
- Custom:** A grid of various text and table formatting options.
- Plain Tables:** A grid of different table grid patterns.
- Grid Tables:** A grid of more complex table grid patterns.

Below the ribbon, a preview of text formatting is shown, including various heading styles (Heading 1, 2, 3, 4) and list styles (List Para., No Spac., Disclai., Cover He., Header, Cover Su.).

## Factsheet

The Factsheet template features a grid layout with the Bolton Clarke logo at the top left. It includes several text boxes and headings, such as "Heading 1", "Heading 2", "Heading 3", "Heading 4", "Number...", and "Body co...".

## Letterhead

The Letterhead template shows a formal letter layout with the Bolton Clarke logo and tagline "HEART OF POSITIVE MINDS" at the top right. The body text includes a "Dear [Name]" salutation, a "Letter Subject" line, and several paragraphs of text. The footer contains contact information.

## Agenda

The Agenda template features a meeting agenda layout with the Bolton Clarke logo at the top left. It includes a "Project name / Meeting title" section, a table for meeting details (Location, Duration, Purpose, Chair, Minutes, Guests, Address), and a "Review of previous minutes and outstanding actions" table. Below this is a "New agenda items" table with columns for No., Action, Who, and Related Docs.

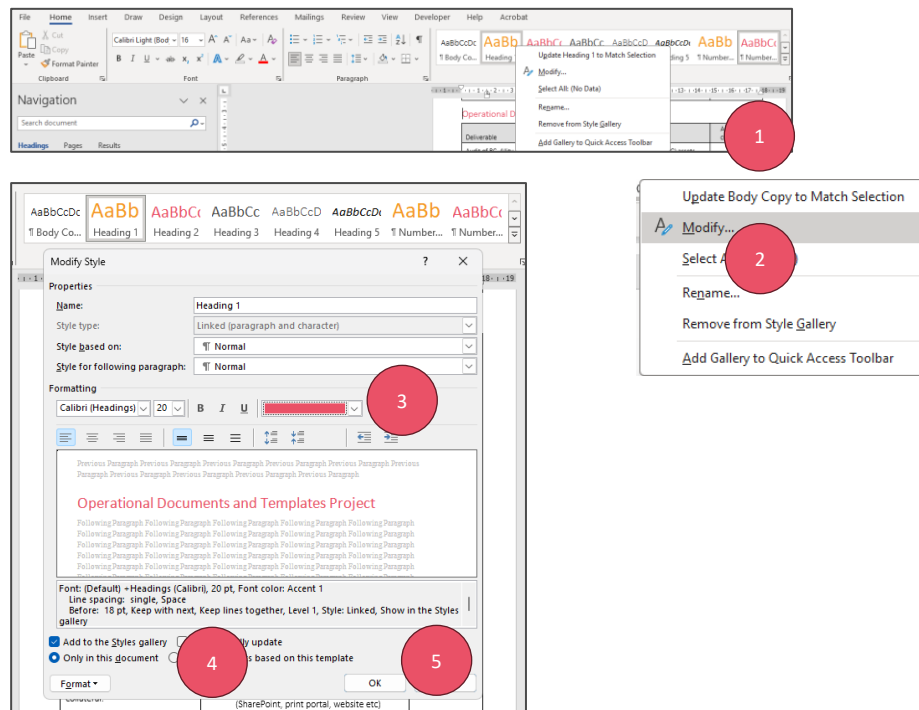
## Report

The Report template shows a document control section with fields for "Document owner", "Issue date", and "File name". Below this is a "Table of contents" section with a list of headings and page numbers. The main report body includes a "Normal, Body Copy text" section with a bulleted list, followed by three "Sample Table Style" tables. The footer contains a disclaimer: "Disclaimer: This presentation (including any attachments) is confidential and may be subject to copyright. It is intended only for the recipient. Unauthorised use, copying or distribution of any part of this communication is prohibited. If you are not the intended recipient, please notify the sender immediately and destroy all copies of this communication."

# Word templates

## How to change the font colour of headings

1. Under **Home**, select the Style you want to modify
2. Right click and Select **Modify**
3. Change the colour from the drop-down list
4. Select **Only in this document**
5. Press **OK**.



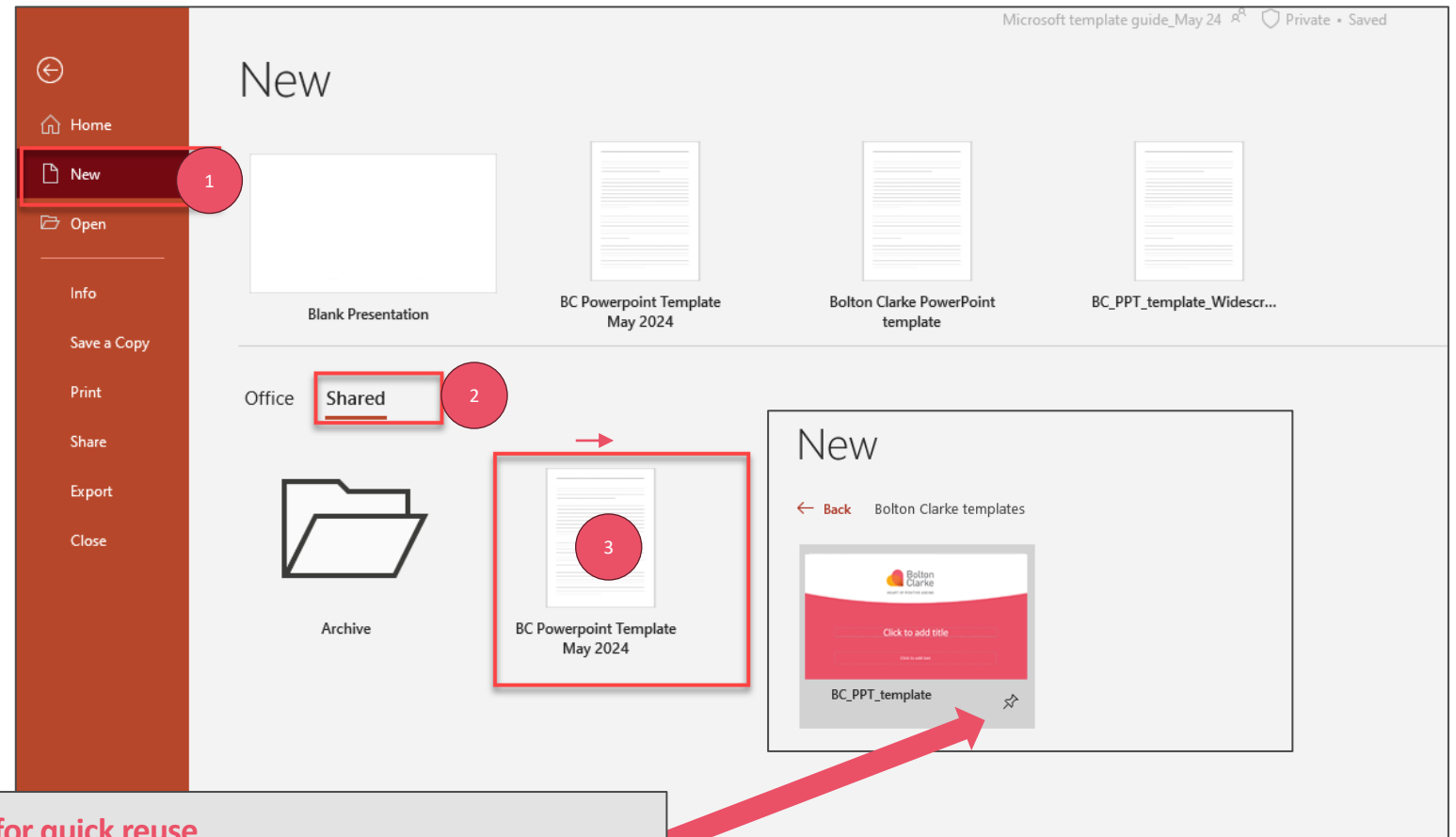
## Existing style font details

Style	Font	Font size	Colour
Heading 1	Calibri	20	Yellow
Heading 2	Calibri	16	Pink
Heading 3	Calibri	14	Dark grey
Heading 4	Calibri Light	12	Dark grey
Normal Body Copy	Calibri Light	11.5	Black
Disclaimer	Calibri Light (Italics)	10	Black

# PowerPoint template

## Accessing the template

1. In PowerPoint, click **File > New**
2. Click the **Custom** or **Shared** tab.
3. Click on either the **Bolton Clarke templates** folder to view the PowerPoint template or click on the **BC Powerpoint Template May 2024**.



### Tip: 'pin' a template for quick reuse

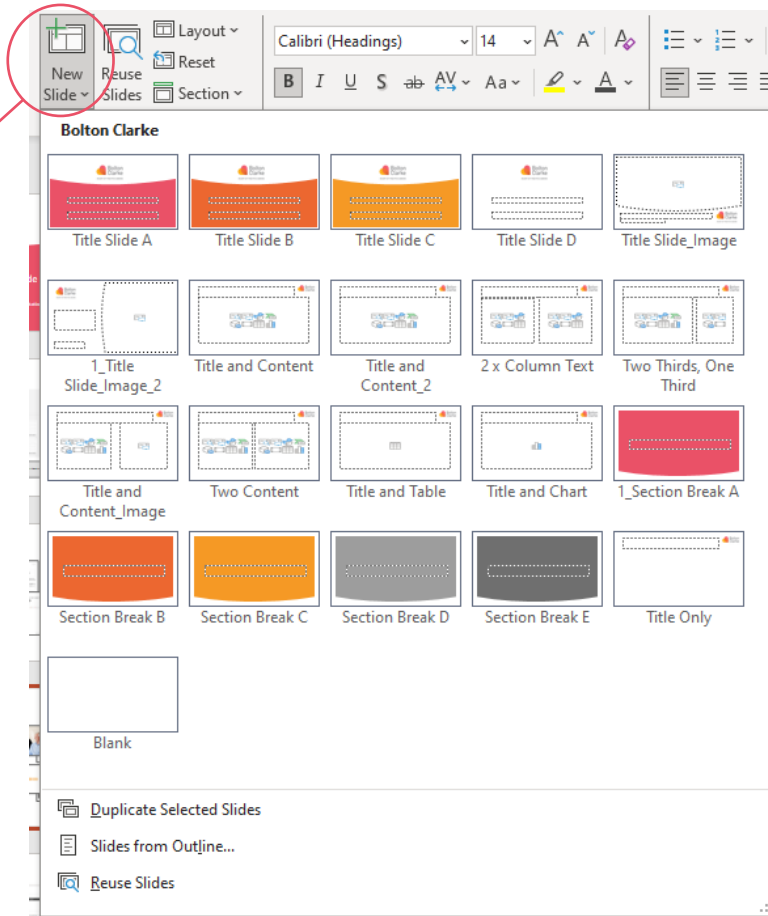
You can 'pin' a template to quickly access it again. Select **File > New** and click the 'Pin' icon. If you change your mind later, you can 'unpin' it.



# PowerPoint template

## Slide layouts

There are multiple slide layouts available within the PowerPoint template and can be accessed by clicking 'New Slide'



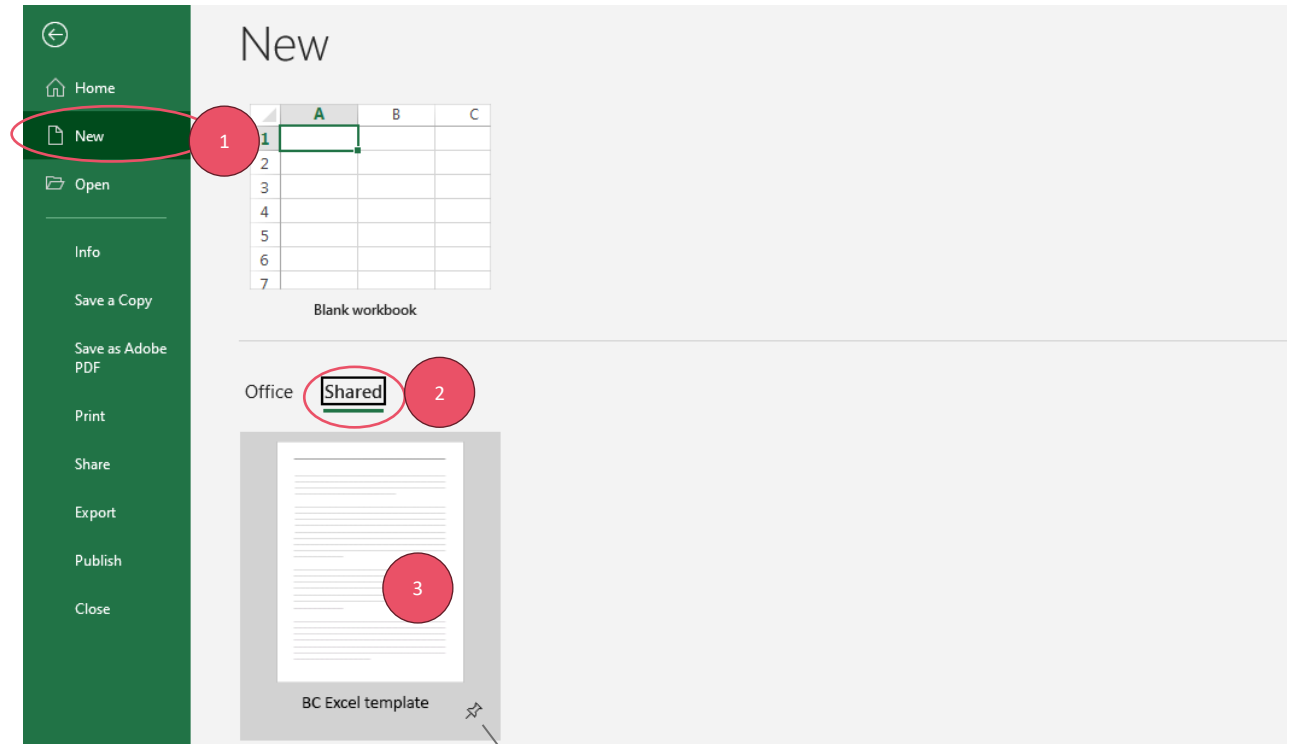
## Example slides



# Excel template

## Accessing the template

1. In Excel, click **File > New**
2. Click the **Shared** tab to view the Bolton Clarke template.
3. Click the template to open a new workbook based on that template.



### Tip: 'pin' a template for quick reuse

You can 'pin' a template to quickly access it again. Select **File > New** and click the 'Pin' icon. If you change your mind later, you can 'unpin' it.

# Excel template

The Excel template contains preset formatting based on the Bolton Clarke branding.

The formatting can be applied to

- text and headings
- conditional formatting
- Tables
- inserted shapes
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