Return to *Formatting Your Dissertation in Word* Homepage

Creating and Applying Word Templates

For current guidance from the University of Minnesota Graduate School, see Graduate School Dissertation and Thesis Guidelines (PDF).

About templates

Why should you set up a template?

- Templates save time: each new document will inherit the proper settings
- Templates help with the frustration of getting new documents "just right."
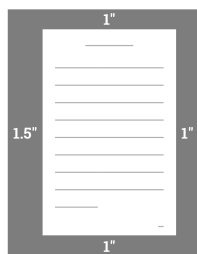
What do templates affect?

- You can use templates to quickly apply:
  - Margins
  - Font type and size
  - Paragraph spacing
  - Page number locations
  - And much more

Your turn: Create a template

If you have been following the previous tutorials, margin settings, font types, headings, and more will already be applied to your document.
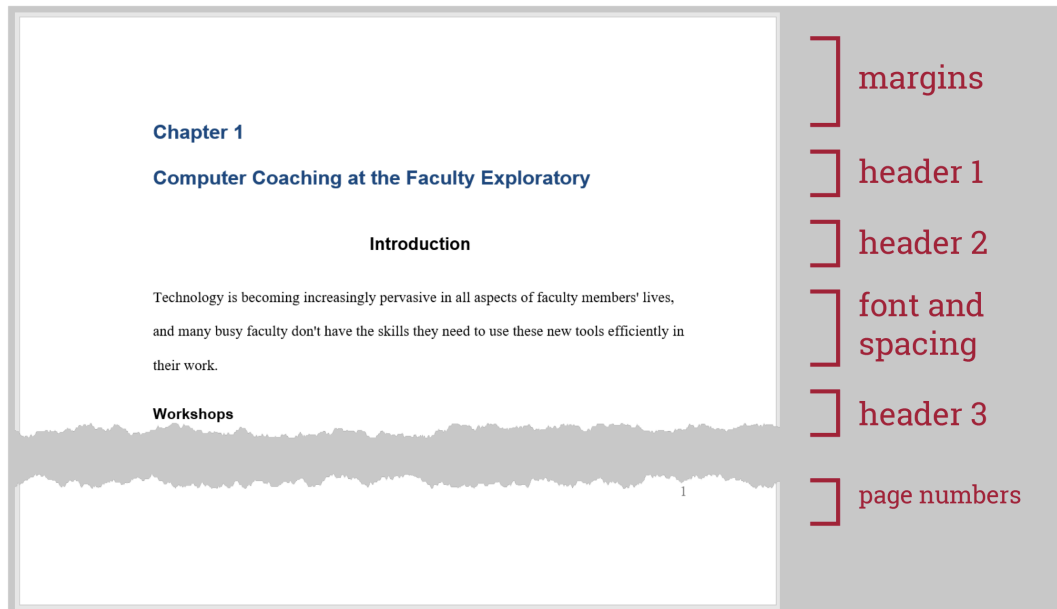
In this tutorial, you will save a Word document as a new template.
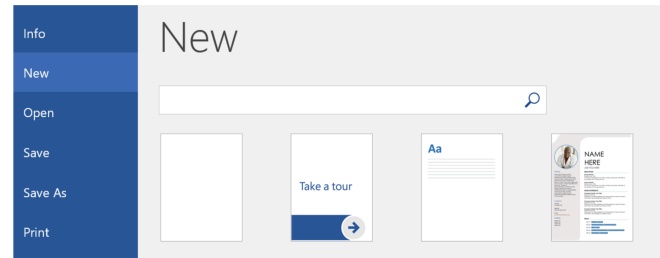
Step 1: Update your document

Setting these aspects of your template will save you time in the future
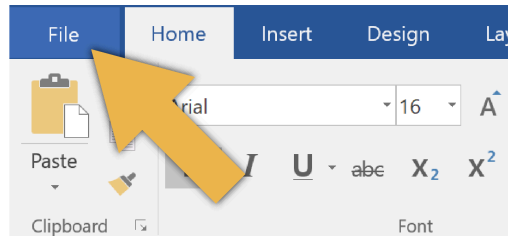
- Margins
- Headers 1, 2, 3
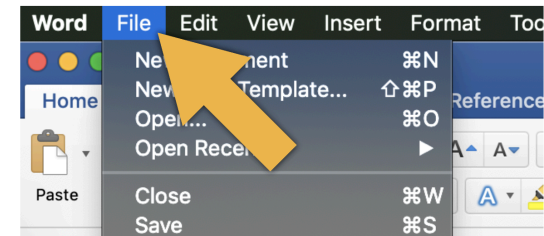- Font and spacing
- Page numbers

Step 2: Select the **File tab**

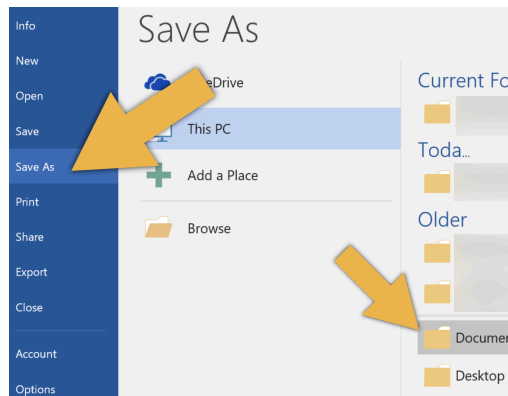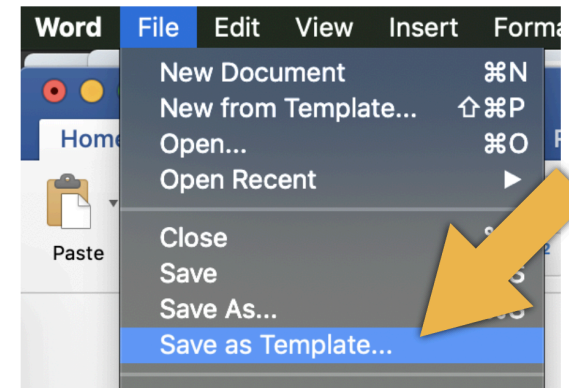Mac users: select the **File menu item**.

Windows:

Mac:

Step 3: Choose **Save As** and then select **Documents**

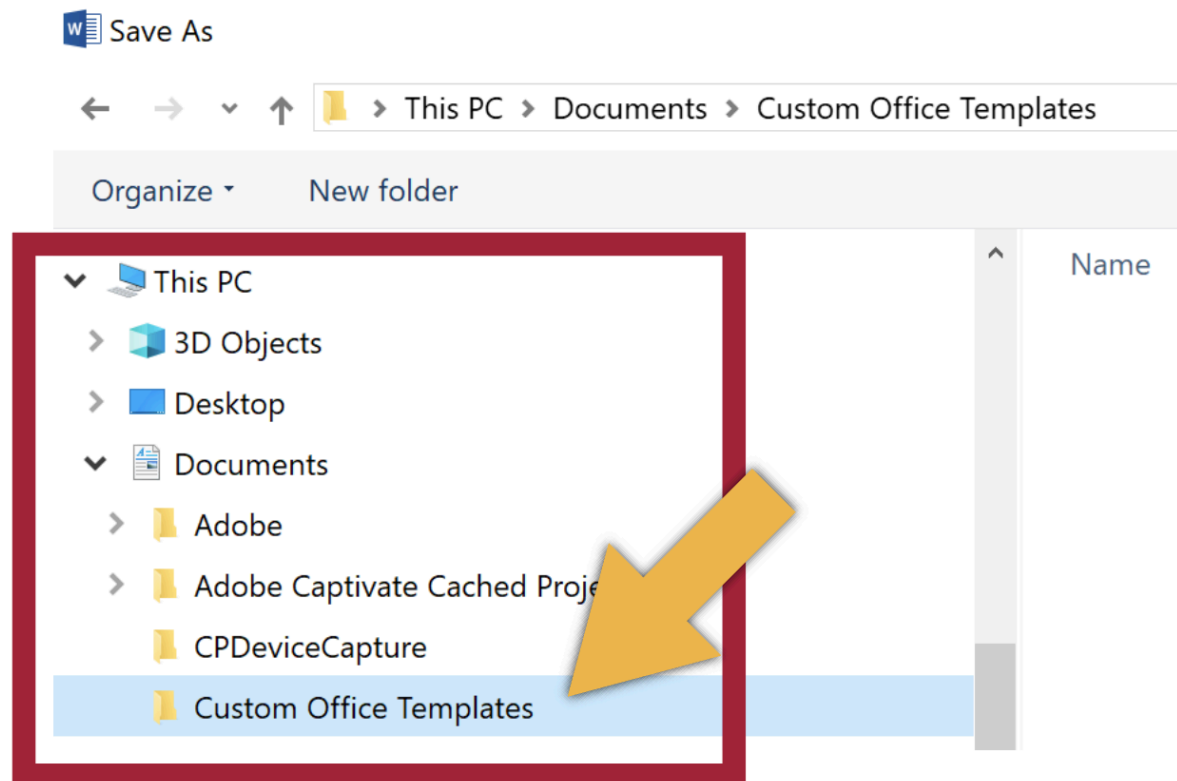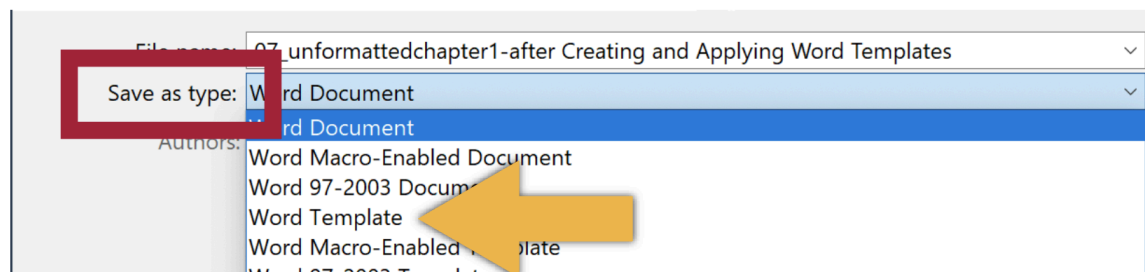Mac users: select **Save As Template** in the **File menu**.

Windows:

Mac:

Step 4: In the **Save As** dialog window, navigate to where you'd like to save the template

We suggest saving your template in the **Documents** folder in **Custom Office Templates**.
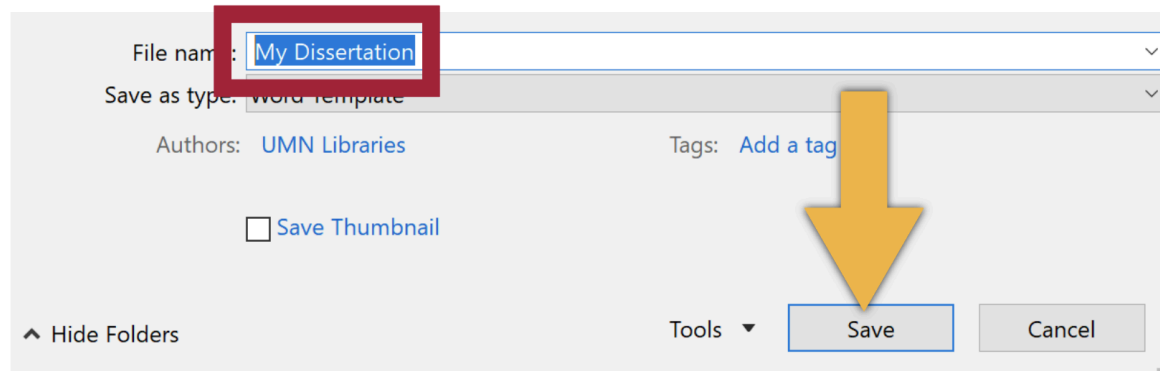
Step 5: Under **Save as type**, choose **Word Template**

Mac users can skip this step.

Step 6: Name your template file and choose Save (this is the final step)

File name: My Dissertation

Save as type: Word Template

Authors: UMN Libraries

Tags: Add a tag

☐ Save Thumbnail

^ Hide Folders

Tools ▼   Save   Cancel

Done!

You have saved a Word document as a new template.

When you write additional chapters you can start with this document to bring in the existing styles.

Sign in

New

Recent

My Dissertation Template
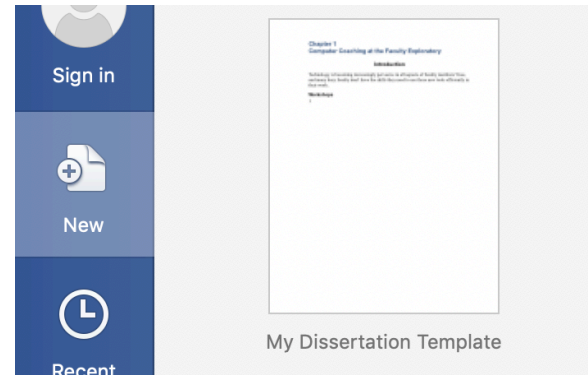
Applying a template

It is likely you already have several chapters written and would like to apply a template to them. To apply a template to an existing Word document you must have the Developer tab enabled.

To turn on the Developer Tab:
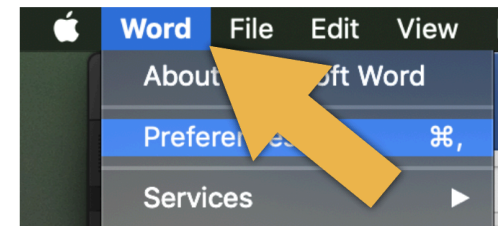
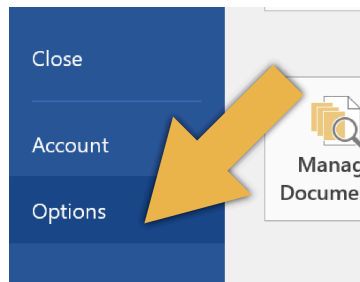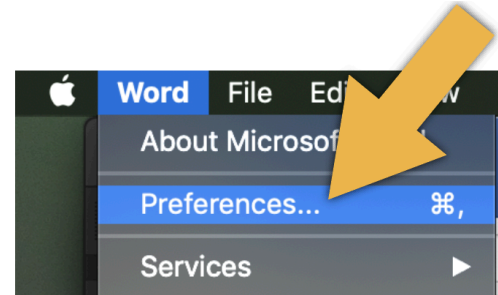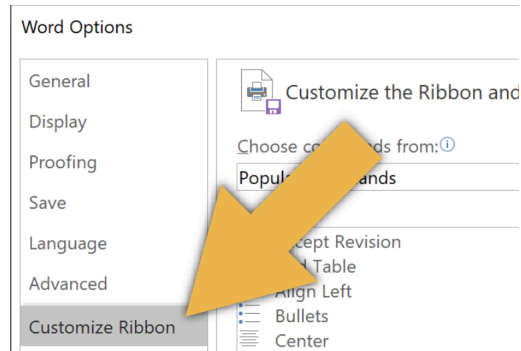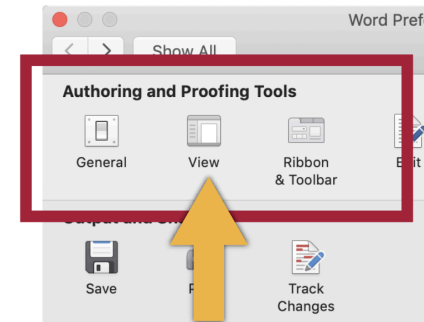|		
Step 1: Choose the **File tab** Mac users: Choose the **Word** menu item.	Windows: 	Mac:
Step 2: Choose **Options** Mac users: Choose **Preferences**.	Windows: 	Mac:
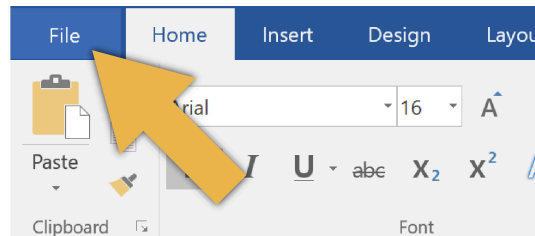
Step 3: Select the **Customize Ribbon** menu item.

Mac users: **Under Authoring and Proofing Tools**, choose **View**.

Windows:

Word Options

General
Display
Proofing
Save
Language
Advanced
Customize Ribbon

Customize the Ribbon and

Choose commands from: ⓘ

Popular Commands

Accept Revision
Table
Align Left
Bullets
Center

Mac:

Word Pref

< > Show All

Authoring and Proofing Tools

General   View   Ribbon & Toolbar   Edit
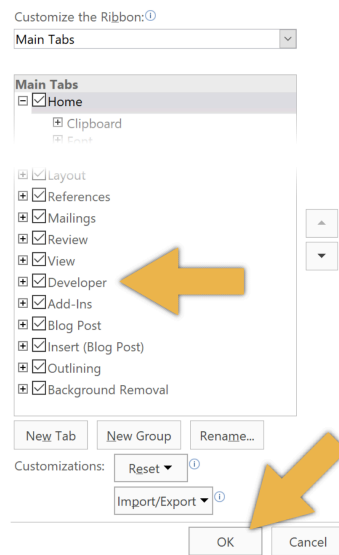
Save   P   Track Changes

Step 4: Check **Developer** under **Customize the Ribbon / Main Tabs** (this is the final step)
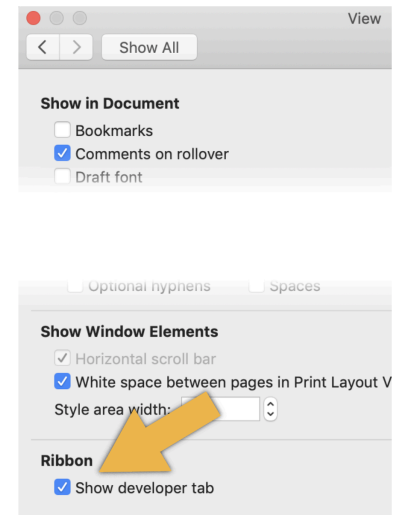
Choose **OK** to save your new menu item preferences.

Mac users: Check **Show developer tab** under **Ribbon.** Close the Options box to confirm.

Windows:

Customize the Ribbon: ⓘ

Main Tabs

Main Tabs
□ ☑ Home
    ⊞ Clipboard

    ⊞ ☑ Layout
⊞ ☑ References
⊞ ☑ Mailings
⊞ ☑ Review
⊞ ☑ View
⊞ ☑ Developer
⊞ ☑ Add-Ins
⊞ ☑ Blog Post
⊞ ☑ Insert (Blog Post)
⊞ ☑ Outlining
⊞ ☑ Background Removal

New Tab   New Group   Rename...

Customizations: Reset ▾   ⓘ

Import/Export ▾   ⓘ

OK   Cancel

Mac:

View

< > Show All

Show in Document
☐ Bookmarks
☑ Comments on rollover
☐ Draft font

☐ Optional hyphens   ☐ Spaces

Show Window Elements
☑ Horizontal scroll bar
☑ White space between pages in Print Layout V
Style area width:
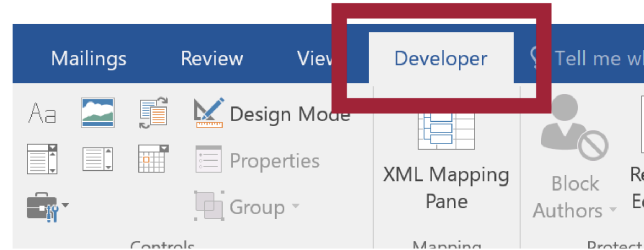
Ribbon
☑ Show developer tab

Done!

You have enabled the **Developer** menu item.

You are now ready to apply a template to existing content.

Your turn: Apply a template to an existing document

In this tutorial, you will apply a template to a document you've already started.

If you haven't already done so, you may want to review the previous tutorials on this theme:
- Create a template
- Enable the Developer tab

You are welcome to use your own document, or work with our example document.
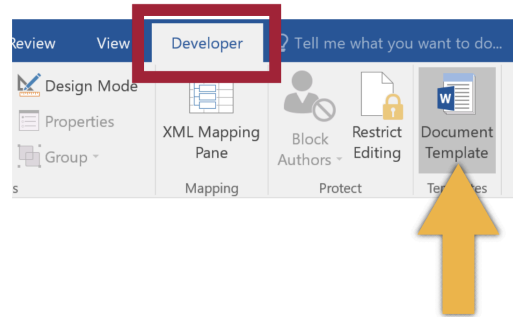
Word:

Mac:
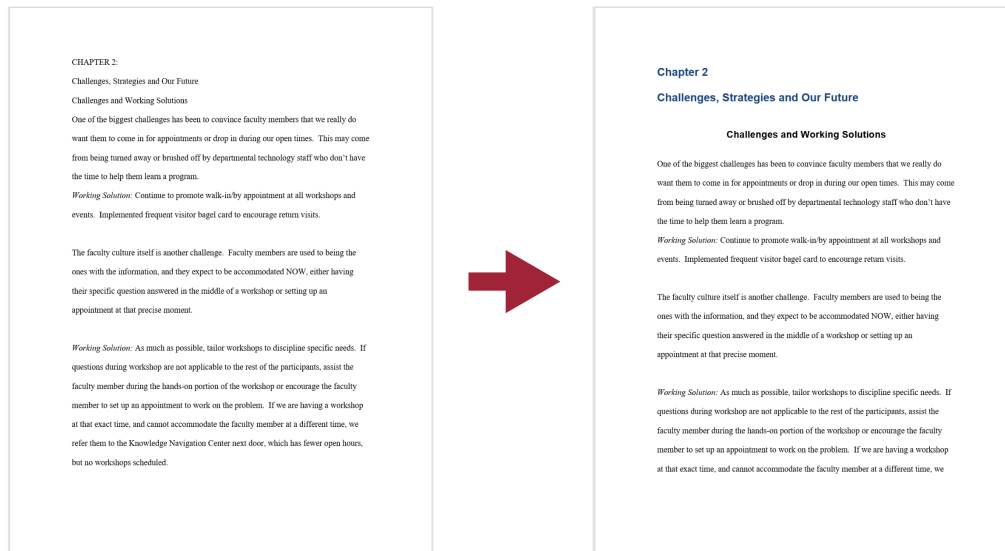
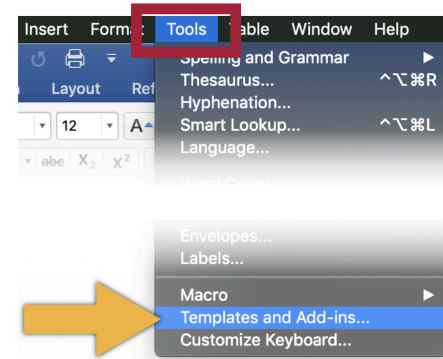Step 1: With your document open, in the **Developer Tab,** choose **Document Template**

Note: How to enable the Developer tab in Word

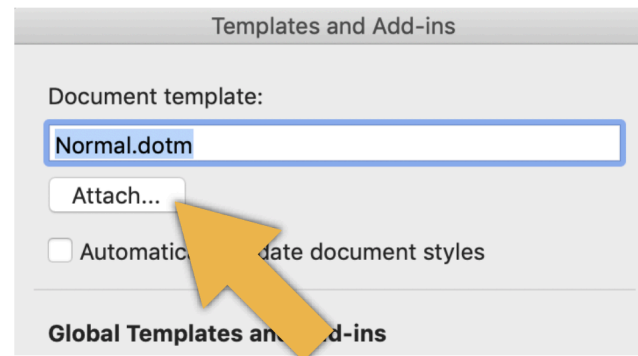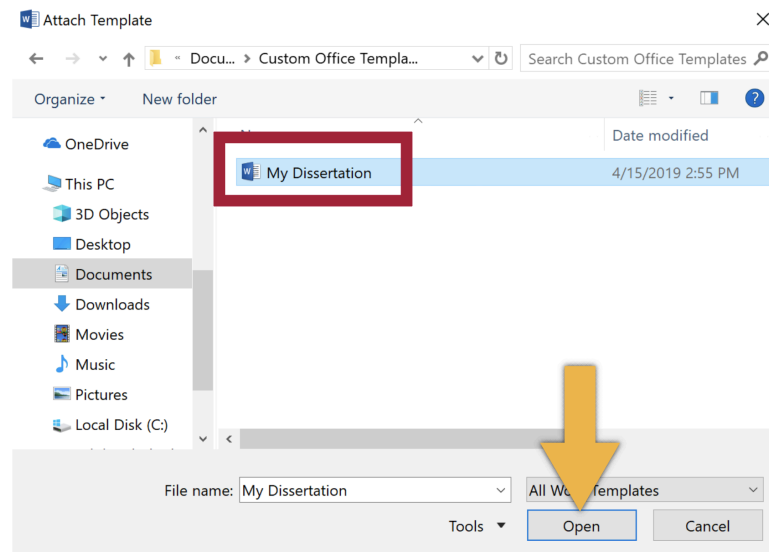Mac Users: In the **Tools** menu, choose **Templates and Add-Ins**
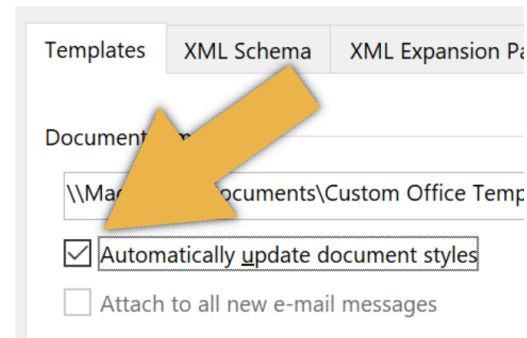
Step 2: Choose **Attach**

Step 3: Navigate to your template file and choose **Open**

Note: For more information on creating a template, see the tutorial [How to create a template](#).

Attach Template

Docu... › Custom Office Templa...   Search Custom Office Templates

Organize ▾   New folder

OneDrive

This PC

3D Objects

Desktop

Documents

Downloads

Movies

Music

Pictures

Local Disk (C:)

Name	Date modified
My Dissertation	4/15/2019 2:55 PM

File name: My Dissertation   All Word Templates

Tools ▾   Open   Cancel

Step 4: Check **Automatically update document styles** and choose **OK** to apply

Templates and Add-ins

Templates   XML Schema   XML Expansion Pa

Document

\\Ma...ocuments\Custom Office Temp

☑ Automatically update document styles

☐ Attach to all new e-mail messages

Step 5: Get the document ready to combine with other chapters by [applying headings](#) and [adjusting the chapter number](#) (this is the final step)
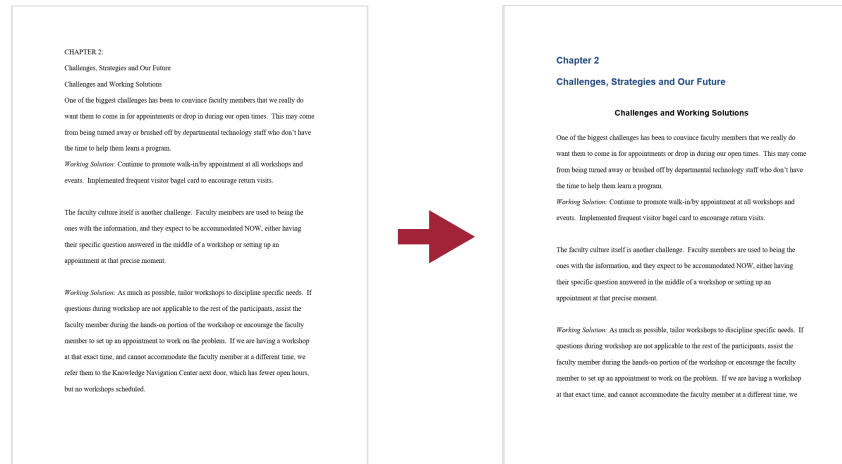
Note: instructions for how to do these steps are in the following tutorials in this series:
- [Defining Headings](#)
- [Increasing Chapter Numbers](#)

CHAPTER 2:

Challenges, Strategies and Our Future

Challenges and Working Solutions

One of the biggest challenges has been t

Chapt AaBb AaBb
¶ Heading 1   ¶ Heading 2   ¶ Headin

Chapter 2

Challenges, Strategies a

Challenges a

Done!

You applied a template to a document you had already started.

Learn more

- [Create a template in Word](#) from Microsoft