How to use document templates

Templates are special Adobe InDesign CS6 documents you can use to create additional, consistent InDesign documents. A template can help you create standard documents because it includes layout, graphics, and text that all documents based on that template will have in common.

For example, if you prepare a monthly newsletter, you could create a template with the full layout of a typical issue, including guides, grids, placeholder frames, layers, and any reused graphics or text. You can even store master pages in templates. Although you could just save last month's issue with a new name, templates help you avoid the risk of destroying the old file. Because templates automatically open without a filename, they force you to create a new document instead of overwriting an old document.

You create a template the same way you create a regular document; the only difference occurs when you save the document.

Templates are often used in team environments. As a result, you want to make your templates as user-friendly as possible. This starts with giving them meaningful names, such as "ace_company_newsletter_template." You can also add a layer with instructions on how to use the template. Warn users to hide or delete the instructions layer before printing the document.

To save a document as a template:

1. Start InDesign and open a document.
2. Choose File > Save As.

   The Save As dialog box appears (**Figure 1**).
3. Browse to the location where you want to save the template.

   Make sure this is a location you can access later.
4. Enter a name you and your team members will recognize later, such as **sports_page** or **club_page**.

   Good naming conventions are an essential part of an efficient working environment, and it's good practice to use meaningful names.
5. Choose InDesign CS6 Template from the Save As Type menu (Windows) or Format menu (Mac OS).
6. Click Save and then close the template.

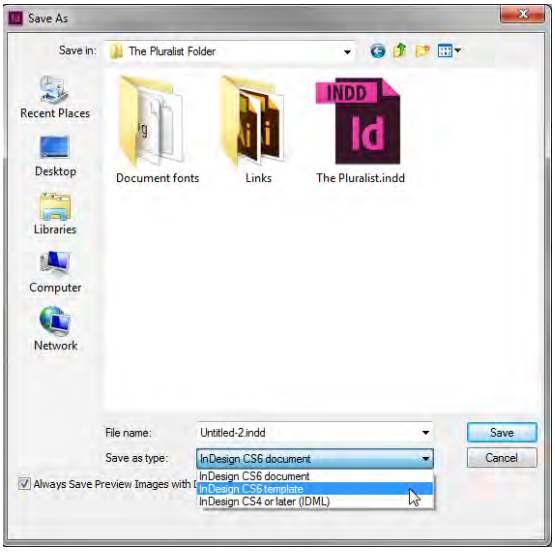

Figure 1 Save As dialog box

To start a new document from a template:

1. Choose File > Open.

   The Open A File dialog box appears (**Figure 2**).

2. Locate and select the template you created in the previous section.

3. Select the Normal option (Windows) or Open Normal option (Mac OS), and then click Open.

   Observe that the new document is untitled.

4. Choose File > Save to save the new document with its own name.

   Note: InDesign gives the file an .indd extension by default. You should keep this extension.

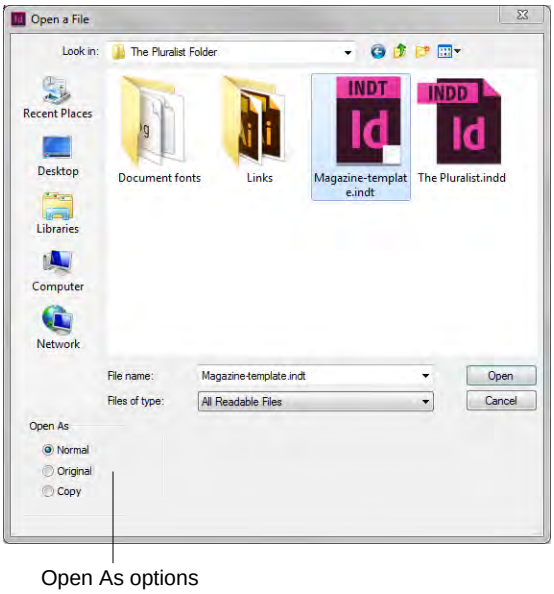

Figure 2 Open A File dialog box

To edit an existing template:

1. Choose File > Open.

   The Open A File dialog box appears (**Figure 2**).

2. Locate and select a template.

3. Select the Original option (Windows) or Open Original option (Mac OS).

4. Click Open.

5. Make changes to the document as you would to any other InDesign file.

6. Choose File > Save.

   The file automatically saves as a template.

   Note: When you update a template, this does not change files that were created with the template. Templates serve only as starting points in InDesign.

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