



## Module 3, Lesson 1

### PowerPoint Pro 3.0: The Slide Master: Introduction and Using it to insert Logos, Headers, and Footers

Welcome to the first lesson in this third module of the PowerPoint Pro course. You're going to get an introduction to the Slide Master in this lesson and learn how to use it to insert logos, headers, and footers on slides.

The outline is as follows. We're going to start with a quick explanation of the Slide Master and when it's useful, when it's not useful, and why it sounds like a very useful feature in PowerPoint but why, in practice, it's often less useful than you might think. Then we'll go into the setup and explain how to set up the Slide Master properly and what the first slide there does or the first layout there does versus all the other layouts or slides in that view of the presentation. And then, for your exercise, you will just arrange the first slide or the first layout here, normally called the Office Theme, in the Slide Master properly, and you will add the Goldman Stanley logo and then the slide number to the bottom and delete anything unwanted or unnecessary.

If you think about what we've done so far, we have created or fixed around eight slides total in this presentation. And if you go into the Before file, you can see the slides.

[01:01]

We have the Table of Contents slide, the Executive Summary, the Summary of Forecasts, this Company Profile, a pipeline slide, the Management Assumptions slide, and then a couple of others here, and then we also have our formatting guide at the end. But if you think about what we've done in detail, you'll realize that we didn't really set this up in the best or most intelligent way because there's a lot of repetition across these slides. For example, we have this Project Jaguar right here on the Executive Summary slide. And then, if we go down to the Operational Forecasts slide, we have the same thing, and it's a text box in both places that's exactly identical. In the same way, if we go down to the bottom of each slide, we have the Goldman Stanley logo down here, but this is a simple text box that is in exactly the same spot on every single slide here.

This is a bit dangerous because if something ever changes, if we rename this or if we want to use a logo instead of the text for our bank or something like that, it's better to use the Slide Master to insert these types of text, objects, and graphs all in one spot. We can put them on one slide or layout in the beginning, and then they will apply to every single slide or many slides in the presentation.



[02:10]

The Slide Master lets you do this and apply styles to the entire presentation or just to certain slide layouts, which is the PowerPoint term for templates.

So the key shortcuts here are as follows. There's Alt, W, M to enter the Slide Master mode, Alt, M, C to close out of it, or you could press Alt, W, L to go back to normal edit mode. You've seen some of these before actually, because I briefly introduced the Slide Master in one of the lessons in Module 1.

But just to review, let's go to our presentation. If I press Alt, W, M, I enter the Slide Master mode, and you can see the first slide or layout here and then all the subsequent ones after that. If you hover over each slide, it also tells you which slides are actually using this layout or this template. So in this case, every single slide here, slides 1 through 9 are all using this title slide layout or template.

[02:59]

I can press Alt, W, L to go back to normal mode. Or I can press Alt, M, C to close out of the master view. It doesn't really matter. Either one works.

Other useful shortcuts are Alt, H, L to change the slide layout, Alt, H, Q to reset the slide layout to the default one, and then Alt, N, H to insert a header or a footer, which includes the slide numbers as well. Now, the difference with these three shortcuts is that you use them outside of the Slide Master. So although they directly relate to it and they reference things that exist within the Slide Master, you're not actually in the Slide Master when you use these.

Let's look at a few quick examples. So if I press Alt, H to go to the Home menu and then L right here, it lets me change the type of layout I want for the slide that I'm currently on. So I can change it to Title, Title and Content, Section Header. These are basically all the default layouts that come with any type of new PowerPoint presentation, and frankly, most of them are not very useful. Whenever you work on a presentation in banking or finance, you're probably going to replace all these or heavily modify these in any type of client-facing presentation that you use.

[04:06]

With the other shortcuts, Alt, H, Q just resets the slide layout. Now, in this case, it's not particularly useful because if I press Alt, H, Q right here, we get sort of the default layout with this Table of Contents and then this text box to add a subtitle here. And the reason we get this



on this slide is because if you go to Alt, W, M, you can see that, with this particular template, these are the default elements that are included. We have a title and a subtitle right here.

Now, in our version of this, we have deleted these elements altogether, so they're completely gone. But by default, they are inserted. So when we do that, we reset this. We get back all the elements from the template or the layout that we might have deleted on the actual slide that is using it. For now, I'm going to go back and delete all of these because we don't really need or want these.

And then the last shortcut here, Alt, N, H for the header and footer. So this one is pretty simple. If I go to Alt, N for Insert and then H, I can add the slide number or I can remove it, I can add a footer or remove it, and I can specify what I want here.

[05:05]

So I can say "Test," and then I can say Apply to All. And now, we have this down here, Test, and we have the slide numbers. If I get tired of the slide numbers and I go to Alt, N, H, and I decide I don't want to use them, I just uncheck this. And now, we don't have the slide numbers anymore.

In most cases here, you are not really going to use a built-in footer for reasons that we'll get into in a little bit. However, you are pretty much going to use the slide number. The date and time, I would say, are uncommon for investment banking-style presentations. You might list the date on the first slide, but you're probably not going to list that on every single slide in the presentation.

You can also have this option to not show these, the slide number, the footer, the date and time on the title slide, which we almost always do. We don't currently have a title slide in this presentation, but we will get to this in an upcoming lesson. For now, I'm just going to leave this with the slide number selected but not the footer.

Now, there are, of course, other shortcuts related to the Slide Master, but these are the most important ones to know for now.

[06:04]

Another important concept here is a placeholder versus normal objects, and this takes a bit of explanation. But the idea is that with a placeholder, when you insert a placeholder in the Slide Master on the templates or the layouts there, you can actually edit that shape or text box on normal slides. On the other hand, when you just insert a normal shape or a normal text box or a



normal line, you cannot actually edit them or align or distribute to them on normal slides. So you have to be very careful with what you actually want to be able to edit and then which part should stay constant when you're doing this.

Now, it's not really an issue if you insert anything on the very first slide in the Slide Master, layout number 1, because placeholders are not allowed there. There are some default ones that appear, but these just really control the font styles and sizes in the presentation. Let's look at a few examples of how this works.

[06:57]

So if I go to Alt, W, M and let's say that I just go to the title slide layout, if you notice, when I go to the first slide here, this Insert Placeholder in the menu doesn't even show up, or it shows up, but it's grayed out, because I can't actually add anything on this very first slide. But for all the others here, I can actually do this and insert a placeholder.

So let's look at how this is different. These text boxes are both placeholders by default, but I can add another one. I can just go up, Alt, M and then A for Insert Placeholder, and I could do something like inserting text right here. So let me just add another random text box, and I'll just call this Testing placeholder or something like that. So we have that.

And then I can also add a shape on this slide. So if I go to Insert, better yet, let's use our Quick Access Toolbar, so Alt, 8 and let's just add a rounded or a square rectangle right here. So now we have a placeholder. We also have a rectangle. Press Alt, M, C to close out of this.

[07:57]

This rectangle now appears on every single slide in our presentation because they're all using the template that I just showed you before. Now, notice how when I try to click on this rectangle, it doesn't work. I can't actually select it. I can't move it around. I can't align or distribute anything to it.

On the other hand, the placeholder that we added doesn't actually show up on any of these slides. So when I add a placeholder like this, it is very much an editable object that I can edit, I can also delete. But just adding a normal shape or text box on a layout in the Slide Master, it's not possible to actually remove that when you're looking at normal slides.

If I press Alt, H, Q to reset this to the normal layout, now you can see that I get that placeholder test back on this slide. So now I can go in and edit this, and I can go in and also delete it. Just



press the Del key. I'll select the whole shape and press Del. I can also delete these other placeholders. But this rectangle is still not going away no matter what I do.

[08:56]

So it's really important to understand this concept because when a lot of people use the Slide Master, they don't realize that the placeholders are for editable things or for text or shapes that you might want to delete on certain slides or layouts. But then, the actual normal shapes and text boxes and lines are always going to be there. Sometimes you want that and sometimes you don't. It depends on the type of presentation you're working on.

For now, I'm just going to use Shift and left click and delete both of these, and then we'll close out of the Slide Master view. But I wanted to give you a quick summary of how this works before we proceed any further.

Now, you might be wondering about the downsides of the Slide Master, because so far it seems like it could be pretty useful with inserting things like logos and headers and footers, and it is. But one of the downsides is that not all the formatting changes you make will carry through to normal slides the way you want. It's sort of like the issue with copying and pasting shape or text box formats where it only captures the formatting in the first line. There are similar issues here, and they seem to carry through a little bit inconsistently. So you can't really use extremely complicated or in-depth formatting the way you want, especially when you have a lot of text and each line needs to be formatted differently.

[10:06]

Another downside is that a lot of people don't even know about the Slide Master, or they know it exists, but they don't really know how to use it. And if you get a 100-slide presentation from someone and each slide uses the same exact template or layout, it is very cumbersome to convert the entire presentation to the Slide Master.

And then another downside is that if an existing slide already has its shapes and its text boxes and so on all filled out, and then you try to create a layout or a template for this slide, even if you go in and you change the layout, all the existing shapes and text boxes and all that are going to be there. So it can't read your mind and determine that you actually want to swap it out for a templated version of the slide now. So you're going to have to do some manual work whenever you have something like this.



Also, if you have deleted the placeholders, as I just showed you, you can't recover them unless you reset the slide layout, which you can do but which may sometimes cause other issues if you actually wanted to delete some of the placeholders or otherwise change them around.

[11:08]

The bottom line is that you should keep it simple and focus on things like logos, headers, footers, and slide numbers. Don't try to get into crazy or complicated layouts or try to use a template for every single last slide in your presentation, because it's not going to work very well.

Let's go to the second topic and talk about the Slide Master setup. If you're in a new presentation, you should go to the Slide Master and delete all of the layouts that you're not going to be using. The built-in ones in PowerPoint are not very useful, in my opinion.

So for example, in our presentation here, if I go to Alt, W, M, one of the first things I should do is simply delete all of these layouts. So everything after the first one, we're really not using and we're not going to use at all. These are just cluttering up the presentation and taking up space. So that would be the first step.

[11:56]

The second step would be to go into the Slide Master mode and remove the master drawing guides on the first layout, so the ones that are shown in red there, and then anything else you don't want to use. Some of the other layouts may have orange drawing guides, which means that they apply only on slides or they show up only on slides that use those layouts.

If you go to the finished Jazz Pharmaceuticals presentation, Alt, W, M, and then if I go to Alt, W, S to show the drawing guides, you can see the ones in red right here. And then they don't necessarily appear on every single other layout here, but it seems like they do carry through. We want to delete these and move them off the slide, like I just showed you here, because it's very rare to get cases where you're going to use the same exact drawing guides on every single slide in a presentation. It's fine to include them on individual templates or layouts, like the ones that I'm showing you right now. But I don't think it's really a smart idea to use them on the overall slide layout here that controls everything in the presentation.

[12:55]

A third thing you can do is add your company logo at the bottom or top, the slide number, and then any header or footer that will apply to everything.



If you go to the Jazz Pharmaceuticals presentation, Alt, W, M, you can see that, on the very first slide here, we have this Goldman Stanley logo at the bottom. We also have the slide number over here. But we haven't really done too much else. You might think it's a nice idea to use a universal header or footer, but in practice, if you think about it, it doesn't really make any sense because the title slide is probably not going to match every other slide in the presentation here. So it's not like you're going to just be able to take the top part here and say this is my universal header and then apply it everywhere, because the section slides and the title slides usually look quite different. So you usually don't want to do anything like this.

And then something else you can do is adjust the themes, the colors, the fonts, and the background styles. Some banks have their own themes as well, but you don't really need them to use PowerPoint effectively.

[13:53]

So again, going back to the Jazz presentation, Alt, W, M, if I just go to the first slide here, I can go in and I can adjust the built-in color scheme from this menu. I can adjust the background styles, although you very rarely want to do this in a banking-style presentation. I can even change the font. It's set to Calibri by default, but you could change the default font to something else. And then, if your bank has a certain theme, which basically just means a set of layout slides here, you could certainly use it and insert the theme here as well. We're not going to be doing that, but that is an option. And you could even take our finished version here and turn it into a theme if you wanted to do so.

So, with all that said, let's now go into your exercise. What I want you to do here is go into the Before files and set up the Slide Master properly using the steps that we described here. So remove the unused layouts, delete the red drawing guides if they actually show up in your version of PowerPoint, and so on. You should think about the Goldman Stanley text in the bottom left corner.

[14:55]

You should also think about the location and the size and the internal margins of the slide numbers. If you want to see the issue here, try removing the slide numbers and then adding them again, and you'll see what the problem is with the way that these work in the Slide Master and everything else.



Think about the text in both styles, although that's less important. Don't worry about extensively rearranging them. Just maybe change the font sizes and some of the bullet styles. And then think about removing anything else that we don't need and we're not going to use.

I will give you a hint that you can copy and paste objects from normal slides to the Slide Master to do much of this. So don't reinvent the wheel. If you have something you already need on the normal slides and it's going to be on the Slide Master, just copy and paste rather than trying to recreate the whole object.

And if you have any questions, take a look at the finished presentation, the Slide Master there, and you'll be able to see everything we set up. So pause this video right now. Try this yourself. When you're done, come back, unpause it, and then we will go through this together.

[16:00]

Okay. So let's pull up the Before files right here, and I will start by going to the Slide Master, Alt, W, M. And the first thing that I'll do here before anything else is just delete all the layouts that we're not going to use. Right now, if you look at this, it's telling us that this title slide layout is being used by slides 1 through 9, and then all these others are being used by no slides at all. So we should probably just get rid of these. I'll press and hold the Shift key and then left click to select all these, and then I'll press Del.

And then moving up to the first slide here, if I press Alt, W, S to check the drawing guides, we see that the red drawing guides do show up here. Now, again, these may not appear, depending on the version of PowerPoint you're using, but if you do see these, I would delete these.

The Slide Master here is looking better. Everything is using this slide, which is not great, but we can fix that.

For the next step in this process, let's actually exit the Slide Master and think about the Goldman Stanley logo and then the slide numbers here at the bottom.

[17:05]

So the first thing I want to do is just try deleting and adding back the slide numbers so we can see the potential problems here. If you go to Alt, N, H and then we uncheck Slide Number right here, let's remove these, and then, if I go to Alt, N, H, let's add them back in and see what happens. And I think you can see the problem pretty clearly with what I just did. By default, the slide number format here is set on the first layout of the Slide Master, and you can see that the



alignment is all off. It's up too high, it's not aligned with the right edge of our slides right here, and this problem persists on pretty much every other slide in this presentation going to the last page. So that's one issue.

The Goldman Stanley logo or the text here for it, more precisely, is something that's a little bit easier to fix. So let's keep in mind this. Let's keep in mind the slide number over here.

[17:56]

And what I'm going to do for our reference now, I gave you that hint that you can copy and paste shapes from normal slides into the Slide Master. If you just draw a line with Alt, O8, and you can draw it down here, Shift + Ctrl + right arrow key and then drag it over to this drawing guide, one trick here is to copy and paste these types of shapes and lines. So I'm just selecting everything here. I actually don't need the slide number because we're going to change that around anyway, but we want the line over here for some guidance on the alignment.

So if I just do Ctrl + C, Alt, W, M for the Slide Master, go to the first slide here, and then I paste these in, you can see how we don't really need this drawing guide on the left anymore because we pasted in the Goldman Stanley logo. This is now correct. But it is helpful because now we can move this slide number over, and we can get it to the correct alignment on the right side right here. Also, we can try to do some top alignment with the Goldman Stanley logo here as well. I'm actually going to delete the line over here.

[19:02]

With the slide number, the easiest thing to do is to press Alt, 5 on the Goldman Stanley text and see what types of internal margins we're using. These are all zeroed out. I'll set this to Do not Autofit. And then we should probably do the same thing over here. So Alt, 5. Let's zero out all these margins. And we're doing this just because we're using this as an alignment guide on many slides. I'll resize the shape to fit the text, and then I'll say Do not Autofit. And actually, I should have changed the font size to 10 as well. So let's change it to size 10. That just matches what's in the finished presentation if you take a look at that. I'll do a resize again and then Do not Autofit.

And then let's go over and let's just align this to the right edge using this line. So I'll select both, Alt, 1, R, and then let's align this to the top of the Goldman Stanley logo. So I'll select both of them, Alt, 1, T, and we have that. We can delete this line now. It's no longer truly necessary.



And then, in terms of other things we don't need here, if you go to Alt, N, H, so we're displaying the slide number on every single slide right now. We don't have a title slide yet, so this part doesn't really matter.

[20:06]

I would also remove these elements with the date and the footer at the bottom, so Shift + left click + Del. You are very rarely going to use those types of elements in actual investment banking-style presentations. So we prefer to delete them whenever possible.

And then, in terms of other things to fix here, so if you go back and you look at the drawing guides or the style guides here, it's size 24 font. We're saying size 12 for the bullets, the subtitles, and the main paragraph text. And if you just look at some of the bullets here, it's clear that we're using the square shape for most of the bullets. And then we don't really have sub-bullets for the most part, but if we do, we would probably change the style a little bit.

Before making the changes to the bullets, let's just check the slide numbers now and make sure these are correct. You can see that since we set this position and the style in the Slide Master, now this number one actually lines up with the right edge right here.

[21:01]

And I'm just pressing PgDn to move through this. It looks like all the others are also lining up, and this is the whole point of the Slide Master. It makes these types of changes very easy. You don't have to go in and manually change them on all the slides.

Something else that we should probably do is delete the Goldman Stanley logo. We have this on every single slide right now. But if you think about it, it's redundant because now we have it on the Slide Master. So I'm just pressing the PgDn key and just clicking on the shape and pressing Del to delete all the extra ones on these slides. And we have that.

And we're close to the end now. This goes back to one of the drawbacks or potential problems I was mentioning earlier, which is that it is a little bit cumbersome to retrofit existing slides to use the Slide Master if you don't start out using it from the start.

[21:55]

In any case, let's go back to the Slide Master, Alt, W, M. And then, for these text boxes, I can move these over a little bit to match the guides at the bottom, although it doesn't really matter



that much because these are basically used to determine the style of text in bullets but not necessarily the position. So this part is a little bit pointless maybe, but we'll do it anyway.

And then, for the fonts here, so if you go to Alt, H for Home, this is already Calibri font. We could change it to a slightly different style, like the body style here, but I think it's actually fine as is. I'll just change this to size 24. So we can go to Alt, 7 and we have that.

And then we could also potentially resize this. I could say Resize shape to fit text and Do not Autofit, although I don't think it really matters. And then, for the bullets, so the first two are going to be size 12, so Alt, 7, 12, and then the last 3 we can just say are size 10. And this matches what's in the finished Jazz Pharmaceuticals presentation as well.

In terms of the styles, so the first style here, we do want to use a square, so Alt, H, U, and I'll use the square. For the second one, we can keep it as a circle. The third, we can use something else, like one of these arrows maybe.

[23:07]

The fourth level, we could use a dash maybe. So let's go in and if I go to Recently Used Symbols, or I can just scroll down to find the dash somewhere here. And then the fifth level, we can use something like this clover figure or star bullets they call it.

And then, for the actual indents, let's move these over so that the bullet actually aligns with the text above it in each level. Then let's do it down here. And that actually went a little bit too far, so I'll try again. We're never really going to use five levels of bullets in anything in this presentation, but just in case, I am defining the styles up here, and we might be able to get some usage out of this later on.

[24:05]

So that's about all we have to do. You could play around with this some more and try to make it match a bit more closely, but I think it's fine for our purposes. We've accomplished most of the main points here. We fixed the slide numbers. You can see that because if you delete all the slide numbers and then you go to Alt, N, H to add them back, you'll see that they're now in the right position. We have the Goldman Stanley logo effectively hardcoded at the bottom of the slides as well thanks to the Slide Master.

So with that done, let's now do a recap and summary. We started by going over when the Slide Master is useful and when it's not and why it's often less useful than you might think. It's good for things like logos and headers and footers and slide numbers, for example, but if you try to



make it very complicated or you have a very long presentation and not many slides are duplicates or very similar, it's probably not going to be as useful as you might think.

[24:56]

Then we went into the setup, and I explained how to set up the Slide Master properly and then what the first slide does versus everything else in the presentation. You learned about the drawing guides here and also the difference between normal objects and placeholders.

And then, for the exercise, you arranged the first slide, what's called the Office Theme, in the Slide Master properly, and you added the logo and the slide number, and you fixed some other issues with that.

That's it for this lesson. Coming up next, we will look at another use case of the Slide Master, and you'll learn how to set up the formatting guides, currently on the last slide in our collection, and put them on the Slide Master so you can see them everywhere in the presentation as you create and edit slides.