


The dilemma


1. Don't Panic! 2. Now what?

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The slide features a teal header with the title 'The dilemma' in yellow. In the top left corner is a circular logo with a palm tree and the text 'APMP SOCAL 2011'. The main content area shows a screenshot of a Microsoft Word window with a blank document. To the right of the window is a 3D-rendered superhero character in a blue and white suit, scratching his head in a thoughtful or confused pose. At the bottom, a yellow banner contains the text '1. Don't Panic! 2. Now what?'. The footer includes 'APMP SOCAL Chapter 2011' and a small number '2'.




What makes a template?




Page layout:
size, margins
and columns




Header and
footer design




Styles



Heading
numbering



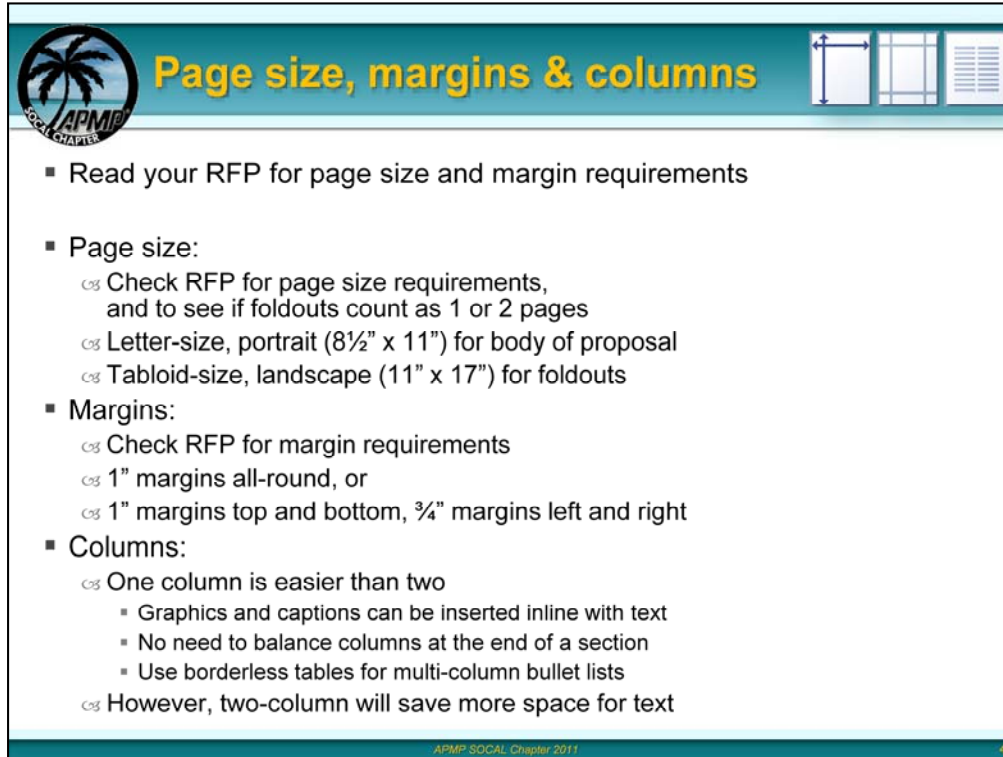
Focus
boxes



Graphics

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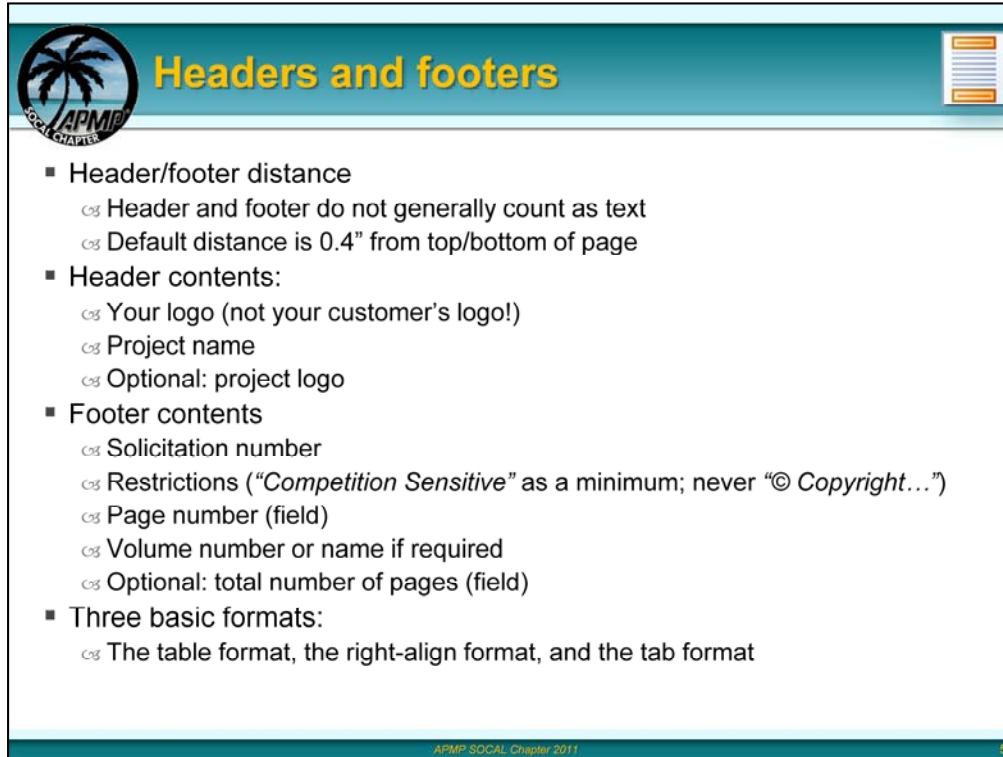
Page size, margins & columns

- Read your RFP for page size and margin requirements
- Page size:
 - ☞ Check RFP for page size requirements, and to see if foldouts count as 1 or 2 pages
 - ☞ Letter-size, portrait (8½" x 11") for body of proposal
 - ☞ Tabloid-size, landscape (11" x 17") for foldouts
- Margins:
 - ☞ Check RFP for margin requirements
 - ☞ 1" margins all-round, or
 - ☞ 1" margins top and bottom, ¾" margins left and right
- Columns:
 - ☞ One column is easier than two
 - Graphics and captions can be inserted inline with text
 - No need to balance columns at the end of a section
 - Use borderless tables for multi-column bullet lists
 - ☞ However, two-column will save more space for text

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This is the easy bit...

If you're unsure about adding foldouts, read Wordman 12: "Foldouts 101"



Headers and footers

- Header/footer distance
 - ☞ Header and footer do not generally count as text
 - ☞ Default distance is 0.4" from top/bottom of page
- Header contents:
 - ☞ Your logo (not your customer's logo!)
 - ☞ Project name
 - ☞ Optional: project logo
- Footer contents
 - ☞ Solicitation number
 - ☞ Restrictions ("*Competition Sensitive*" as a minimum; never "© Copyright...")
 - ☞ Page number (field)
 - ☞ Volume number or name if required
 - ☞ Optional: total number of pages (field)
- Three basic formats:
 - ☞ The table format, the right-align format, and the tab format

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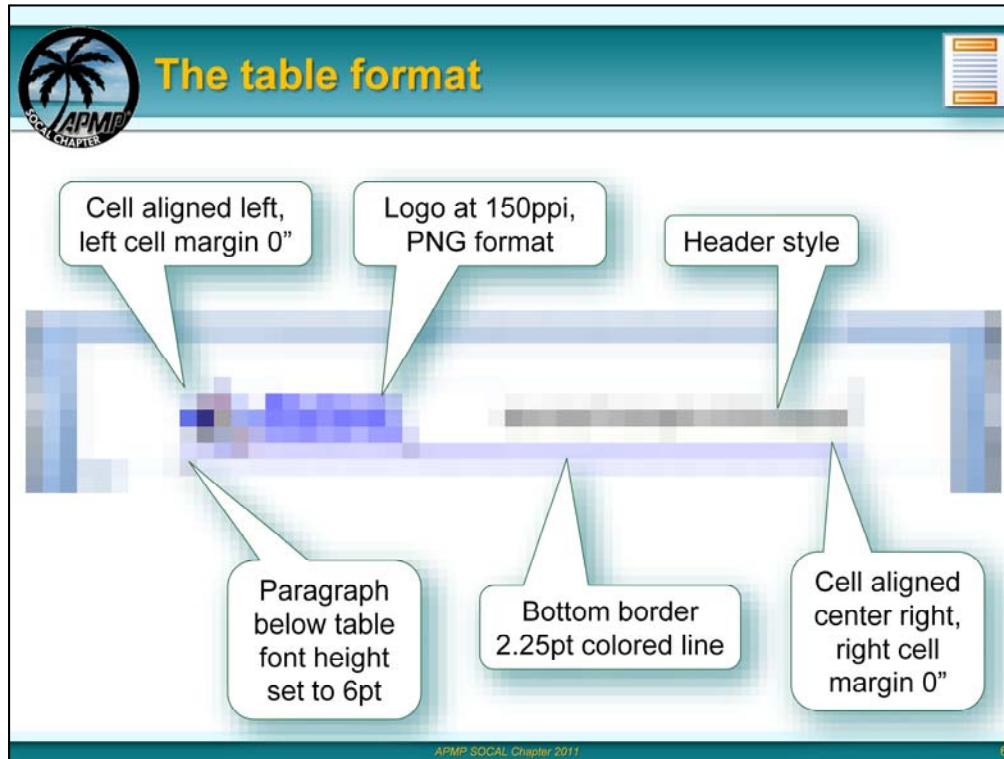
Why shouldn't you use your customer's logo? Because you have no legal right to use it, and they may get upset. Besides, they know who they are: shouldn't you be making them remember who YOU are?

You could use a project logo, if there is one, in addition to your logo. Perhaps as the right end to the line under the footer.

You should have some restrictive text in your proposal footer. For example, "COMPETITION SENSITIVE. Use or disclosure is limited to the restrictions on the title page of this document." On the proposal cover, corresponding text would be "Use or disclosure of this document is limited to [Customer Name] for the purposes of evaluating this proposal. No further release is authorized unless permitted in writing by [Your Company's Name]."

Adding the total number of pages can be a good idea, but does require careful management if you have a lot of sections in your proposal, all in the same document. To add a field for the total number of pages in the document, click Quick Parts in the Text group on the Insert tab, and then select Field. In the Field dialog, set the Categories dropdown to Document Information, and then select NumPages.

To add a field for the total number of pages in a section, i.e. part of a document between section breaks, set the Categories dropdown to Numbering, and then select SectionPages.



Set the left cell's left margin to 0" and the right cell's right margin to 0" to get your table aligned to the margins, otherwise it will overlap the margins.

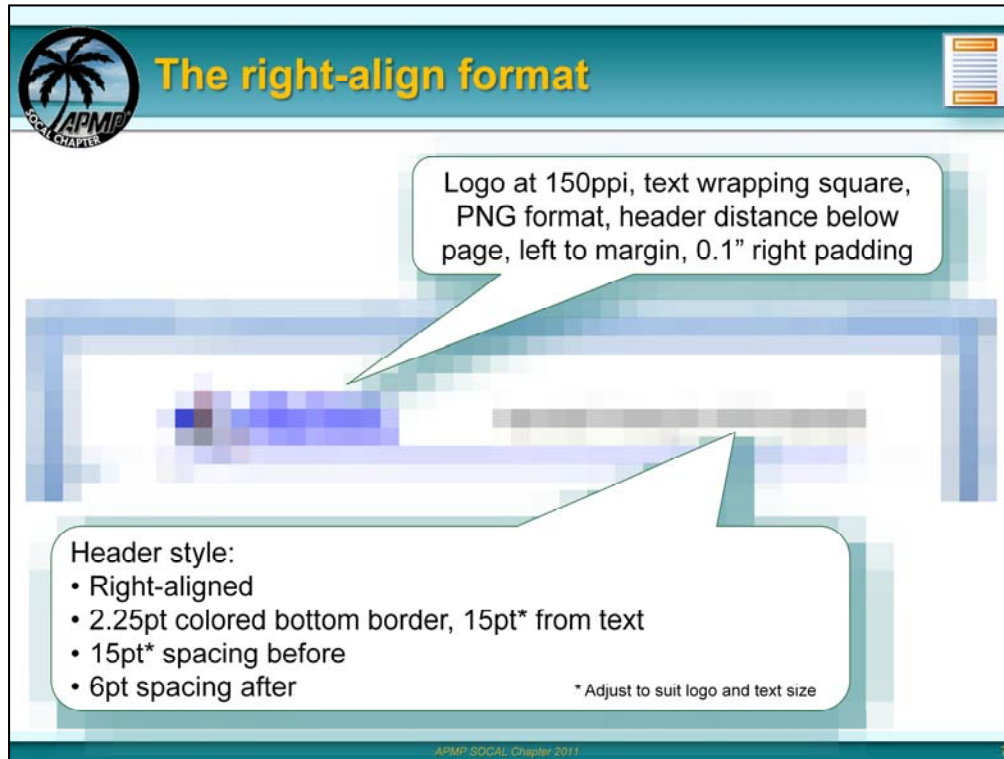
Logos should be at 150 pixels per inch (ppi) minimum for good print quality and minimum file size. Using PNG images ensures clean whitespace in your logo: JPGs may have a dirty whitespace due to the compression process.

Set the font in the paragraph below the table to 6pt, with the paragraph set to single line spacing, to give a gap between the header and the body text.

A colored line at the bottom of the header visually separates the header from the body text.

This format has the advantage that the header text is vertically centered in the header.

If you need to create a foldout page, simply adjust the width of the table.



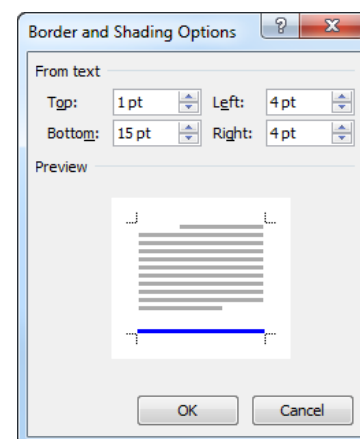
This format has the advantage that the header expands automatically to fill the width of a foldout page. However, if you want the header text to be centered vertically, you will have to adjust the spacing before, and the distance of the border below manually, depending on the font and size of the header text, and the vertical size of the logo.

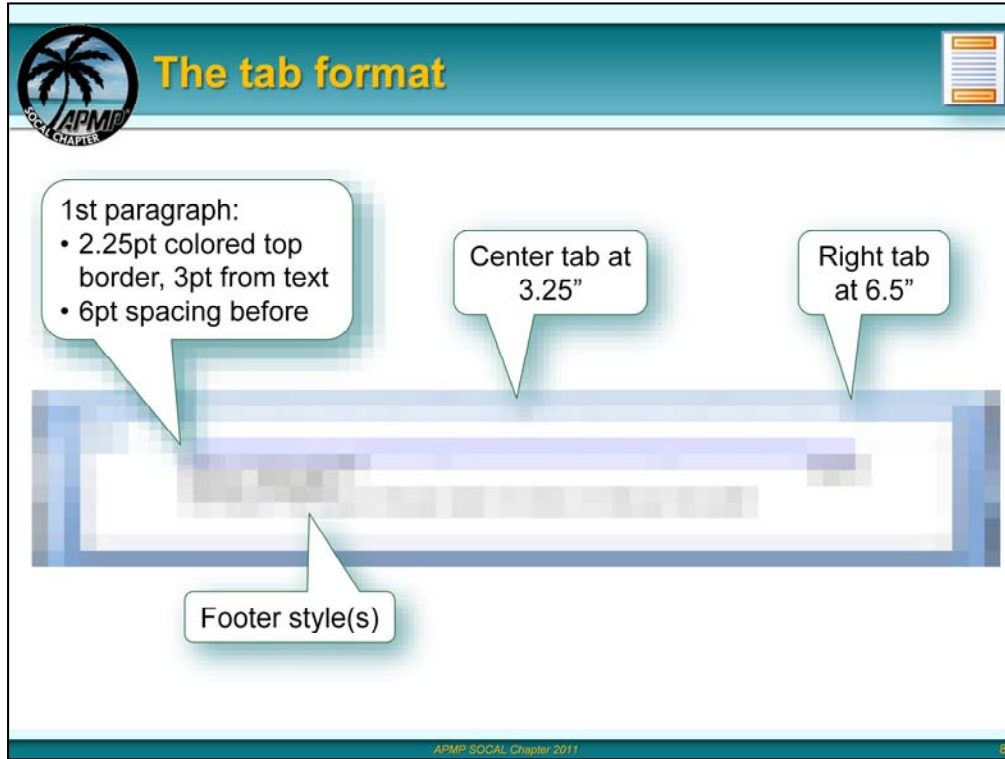
To set the bottom border of the first paragraph, click Borders and Shading in the Paragraph group of the Home tab, and then select Borders and Shading at the bottom of the dropdown list.

In the Borders and Shading dialog, Borders tab, set the width to 2¼pt, and the color to the desired color. Click the bottom border button to add the border.

Click the Options button. In the Borders and Shading Options button dialog, set the Bottom From Text to the desired distance. Click OK to close the Borders and Shading Options dialog.

Click OK to close the Borders and Shading dialog.





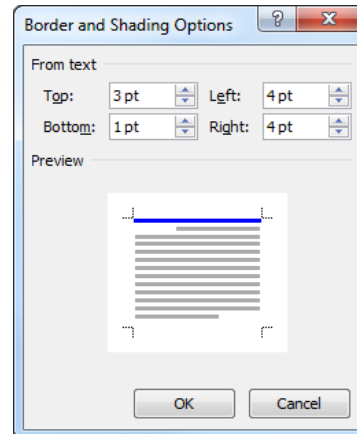
To set the top border of the first paragraph, click Borders and Shading in the Paragraph group of the Home tab, and then select Borders and Shading at the bottom of the dropdown list.


In the Borders and Shading dialog, Borders tab, set the width to 2¼pt, and the color to the desired color. Click the top border button to add the border.

Click the Options button. In the Borders and Shading Options dialog, set the Top From Text to 3pt. Click OK to close the Borders and Shading Options dialog.


Click OK to close the Borders and Shading dialog.

If you need to create a foldout page, you only have to adjust the center and right tabs.





Styles




- Read your RFP to establish minimum font sizes and font face
 - ☞ If not stated, use 12 point Times New Roman for Body Text, Arial for Headings
- Establish a minimum set of styles and a style hierarchy (parent/child)
- Parent styles are always based on “(no style)”
 - ☞ Prevents style corruption
- Child styles are based on parent style
 - ☞ Changing parameter in parent automatically changes parameter in child
- Using the Style Manager:
 - ☞ Expose styles you want to use, e.g. Body Text
 - ☞ Hide styles you don't, e.g. Normal
- Put most-used styles on Quick Style Gallery
- For the really paranoid, restrict document formatting 😊

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It's a really good idea to create a style table before you start. List the styles you're going to need, their relationship to other styles (parent/child) and their use.

Style	Based on	Font Face, etc.	Paragraph Format	Priority
Body Text	No Style	Time NR, 12pt	Single, 6pt after	1
etc.				

The most-often used styles, such as Body Text, should appear first on the Quick Style Gallery.



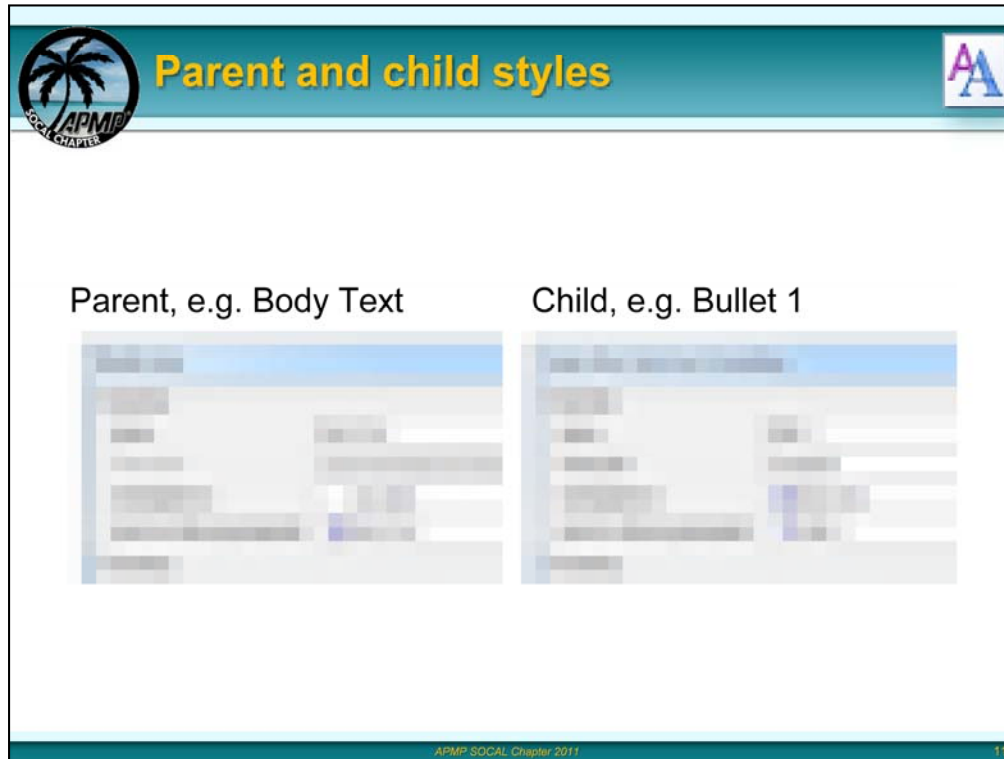
What styles do we really need?



- Minimum set of styles
 - ☞ Body Text
 - Theme
 - Bullet 1
 - Bullet 2
 - Numbered list
 - ☞ Table Body
 - Table Bullet
 - Table Header
 - Table Subheader
 - ☞ Focus Box Header
 - Focus Box Bullet
 - ☞ Header and Footer(s)
 - ☞ Headings 1 through 5
 - ☞ Caption
 - ☞ Table of Contents (TOC) 1 through 4,
Table of Figures (TOF), and TOC/TOF Header

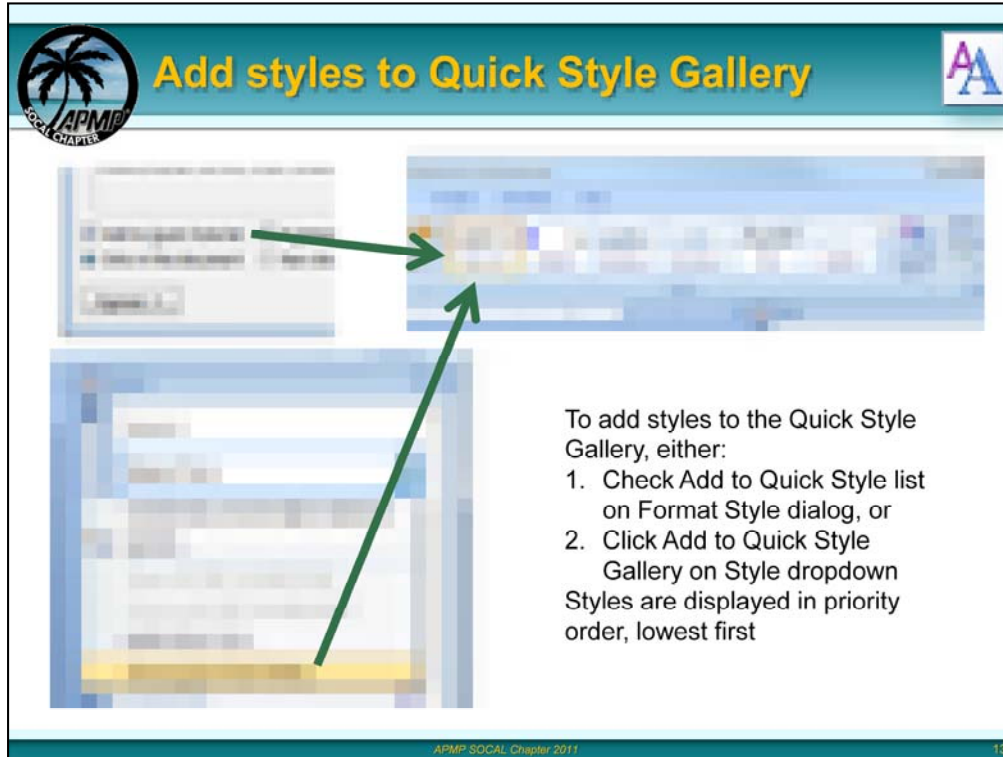
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This is my minimum set, but you probably have some styles you've used before that you'd like to add to this template, e.g. "Bullet 1 (Last)"



In this case, the only change between “Body Text” and “Bullet 1” is likely to be the addition of bullets and a hanging indent.

So if you decide to change the “Body Text” font to, say, 11pt Arial, the “Bullet 1” style will also become 11pt Arial.



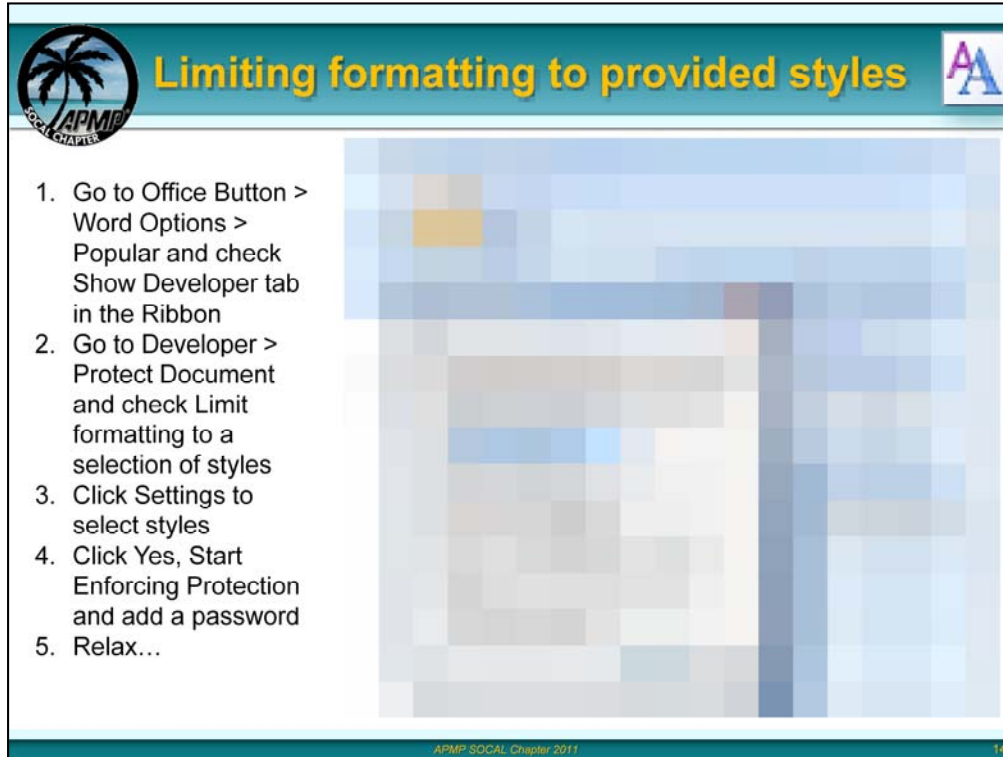
Add styles to Quick Style Gallery

To add styles to the Quick Style Gallery, either:

1. Check Add to Quick Style list on Format Style dialog, or
2. Click Add to Quick Style Gallery on Style dropdown

Styles are displayed in priority order, lowest first

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Limiting formatting to provided styles

1. Go to Office Button > Word Options > Popular and check Show Developer tab in the Ribbon
2. Go to Developer > Protect Document and check Limit formatting to a selection of styles
3. Click Settings to select styles
4. Click Yes, Start Enforcing Protection and add a password
5. Relax...

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This prevents users from modifying styles, creating new styles, or applying formatting to text, such as bold or italic, so this may be more draconian than you need!



And if you use a password, don't forget it!



Heading styles

1.Heading 1
1.1.Heading 2
1.1.1.Heading
1.1.1.1.Heading
1.1.1.1.1.Heading

- Set a contrasting style to Body Text
e.g. Arial 11pt Bold, in a contrasting color to black
- Manually numbered or automatic?
- How any levels?

	Manual	Automatic
	<ul style="list-style-type: none">• Easy to use• Easy to manage unusual numbering sequences	<ul style="list-style-type: none">• Heading numbers automatic• Can cross-reference to headings• Can use chapter numbers in figure captions, page numbers
	<ul style="list-style-type: none">• Cross-references to headings must be inserted (and updated) manually• Number sequence must be inserted and checked manually	<ul style="list-style-type: none">• Need to manually set sequence starting number if not "1"• Need to use hidden text to manage unusual numbering sequences

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Manual or automatic headings? It's up to you, but if you have never used automatic heading numbering before, try it and see. You can always go back to manual numbering.

If you're using automatic numbering:

- To add a cross reference to a heading, click Cross-reference in the Captions group on the References tab. Set the Reference type to Heading, set Insert reference to Heading number, select the required heading in the For which heading list, and then click Insert.
- To update all cross references in your document, press Ctrl+A to select all the text, and then press F9 to update all the fields.
- If you need to split a document up, read Wordman 25: "Breakin' Up Ain't Hard To Do"

Heading styles (continued)





To set up automatic heading numbering, read Wordman 30: "Once More, By The Numbers"

To create run-on headings using the Style Separator, read Wordman 14: "A Matter of Style"

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If you're still using Word 2003, you can find the instructions for setting up automatic heading numbering in Wordman 14: "By the Numbers"

 Focus boxes 			
	Use a frame	Use a floating table	Use a text box
	<ul style="list-style-type: none"> Reapplying FB styles restores size, color and position Frame vertical height expands automatically as text is added 	<ul style="list-style-type: none"> Table row vertical height expands automatically as text is added 	<ul style="list-style-type: none"> Full range of border, shading, and effects formatting available (dubious benefit?)
	<ul style="list-style-type: none"> FB styles must contain identical frame information, or FB will split up! Difficult to create sub-bullets Limited formatting available 	<ul style="list-style-type: none"> Limited formatting available Table must be repositioned and resized manually if accidentally moved 	<ul style="list-style-type: none"> Text Box vertical height must be resized manually as text is added Text Box must be repositioned and resized manually if accidentally moved

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Three little focus boxes

- Width:
 - ☞ Allow for internal margins when using a frame*
- Horizontal position:
 - ☞ Table and frame FBs will overlap right margin if set to align right relative the margin
 - ☞ Set all types to be a fixed distance relative to the margin*
- Vertical position:
 - ☞ Allow for header depth, otherwise aligning top relative to margin will overlap header

* calculations are in the notes to this slide

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Assuming a 3.0" wide Focus Box, at the top right of the page:

Setting the width:

- Table and Text Box: 3.0"
- Frame: required width less 2 x internal margin, i.e. $3.0" - (2 \times 0.08") = 2.84"$



Setting the horizontal position:

- Table: text width – FB width + left cell margin, relative to left margin, i.e. $6.5" - 3" + 0.08" = 3.58"$
- Text Box: text width – FB width, relative to left margin, i.e. $6.5" - 3" = 3.5"$
- Frame: text width – required width + left cell margin, relative to left margin, i.e. $6.5" - 2.84" + 0.08" = 3.58"$


Setting the vertical position:

- Allow for header depth, otherwise aligning top relative to margin will overlap header

As an alternative to worrying about the internal cell margins, set the overall table left and right margins to zero, and use a left indent on your Focus Box Bullet and Focus Box Header styles.


 **Focus boxes as Quick Parts** 

- A focus box can be saved as a Quick Part using any of the three methods described
- To learn how to use Quick Parts, read Wordman 35: “Time for a Quickie”



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Methods for embedding graphics

	Inline	Floating	Text box	Floating table	Frame
Can contain more than one element, i.e. picture and caption text?	✓	✗	✓	✓	✓
Can height, width and location be preset?	✗	✗	✓	✓	✓
Can automatically adjust to height of graphic, with fixed width?	✗	✗	✗	✓	✓
Can contain fields, such as automatic caption numbering?	✓	✗	✓	✓	✓
Can be used on page with multicolumn text?	✗	✓	✓	✓	✓
Can location be defined with styles?	✗	✗	✗	✗	✓


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If you're using a single-column format, then full-width, in-line graphics are the simplest. You'll want to create a "Graphics" style that has, say, 6pt of space before the paragraph (to separate the graphic from preceding text), and the Keep with next attribute checked to ensure the graphic and its following caption stay together.

 **Floating tables or frames?** 


	Floating table	Frame
	<ul style="list-style-type: none">• Can contain any style, e.g. for nested table• Only needs two styles: Artwork and Caption	<ul style="list-style-type: none">• Reapplying styles relocates and resizes frame• Visible anchor allows easy relocation of frame to another paragraph
	<ul style="list-style-type: none">• No visible anchor• Automatic caption numbers can get out of position when two-column page contains more than one single-column table	<ul style="list-style-type: none">• Needs style(s) for each location, i.e. top left, top right, etc.• Can only contain styles with frame information• Cannot apply styles to tables after inserting into frame

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Embedding graphics in more detail


Read Wordman 33: "Almost a Desktop Publisher"



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And finally...

- Go to Office Button > Prepare > Properties
- Click Document Properties > Advanced Properties to display Properties dialog
- Enter Title (of proposal), Company.
- Text restricting the use of the document can be added to the Comments

- Add a password if you're going to restrict formatting

- And save as a Word Template (*.dotx)

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More information

- Wordman archives on the APMP website:
www.apmp.org/?page=WMArchives
- Wordman's Forum on LinkedIn:
www.linkedin.com/groups/Wordmans-Forum-4015004
- Wordman's website:
www.iamwordman.com
- Wordman's email:
word.man@cox.net
- Wordman on Twitter:
[@IAmWordman](https://twitter.com/IAmWordman)



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