



APMP
PACIFIC NORTHWEST
CHAPTER

APMP Pacific Northwest Chapter
Fall Symposium:

The Art of Proposal Creation

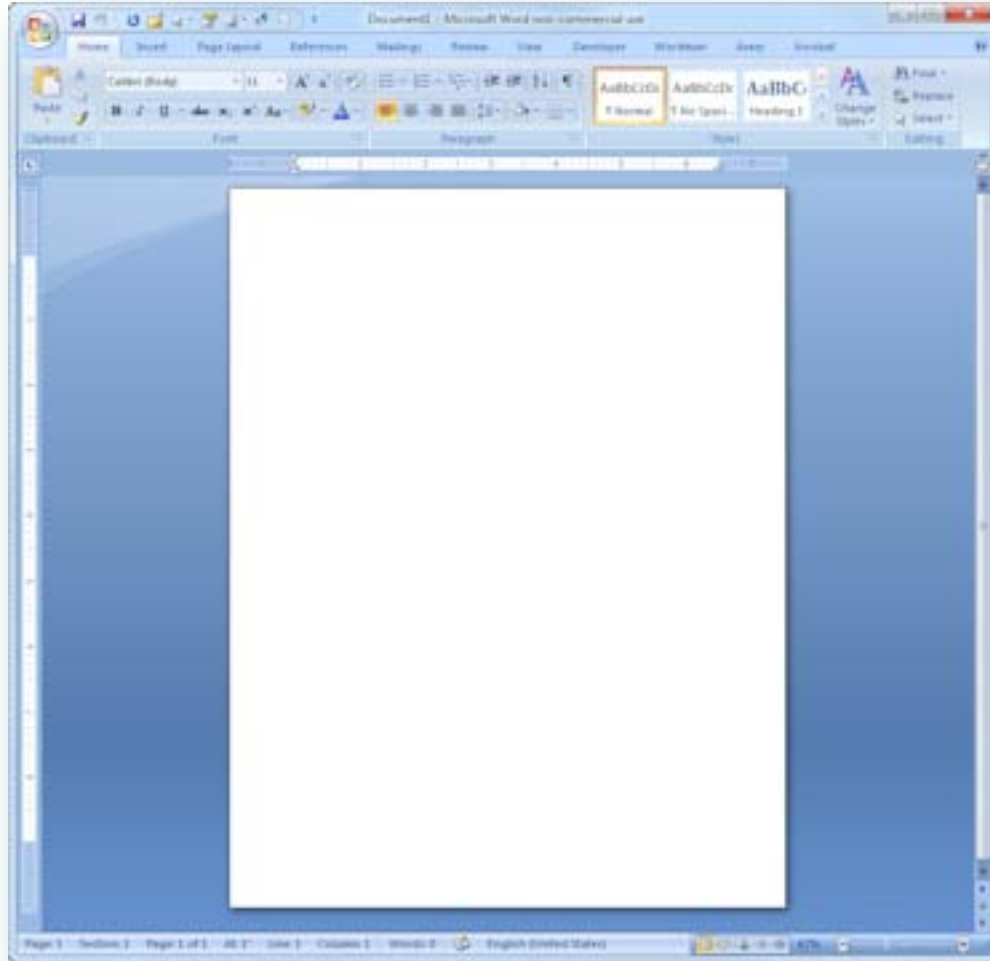
The Art of Template Creation: from new Word document to Proposal Template

Dick Eassom, AF.APMP
(aka Wordman)





The dilemma



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



What makes a template?



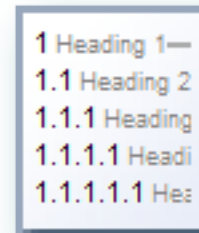
Page layout:
size, margins
and columns



Header and
footer design



Styles



Heading
numbering



Focus
boxes



Graphics



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



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



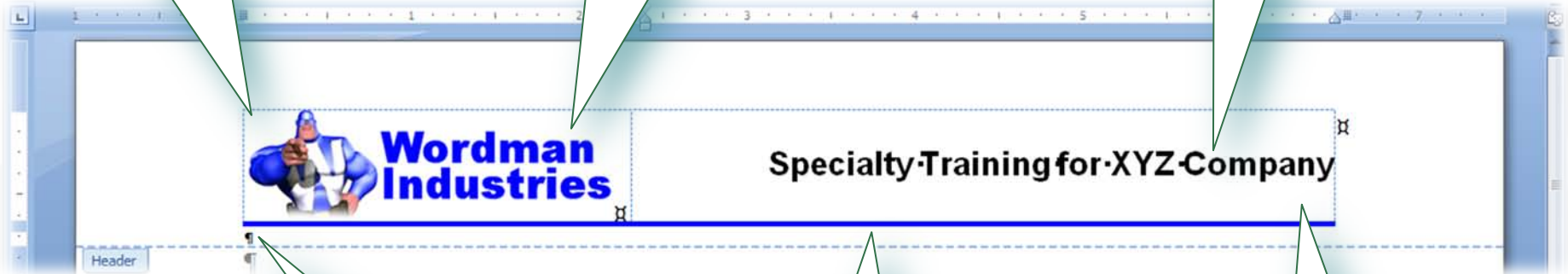
The table format



Cell aligned left,
left cell margin 0"

Logo at 150ppi,
PNG format

Header style



Paragraph
below table
font height
set to 6pt

Bottom border
2.25pt colored line

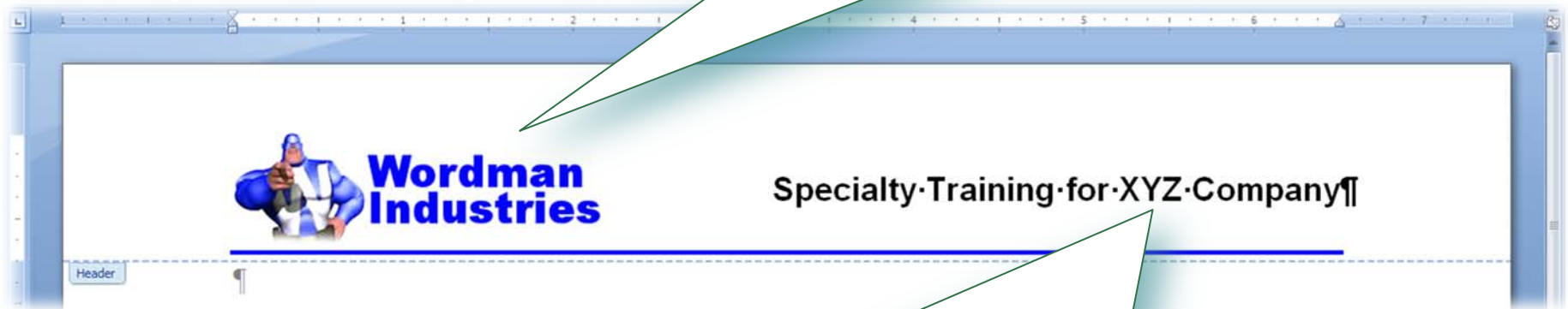
Cell aligned
center right,
right cell
margin 0"



The right-align format



Logo at 150ppi, text wrapping square, PNG format, header distance below page, left to margin, 0.1" right padding



Header style:

- Right-aligned
- 2.25pt colored bottom border, 15pt* from text
- 15pt* spacing before
- 6pt spacing after

* Adjust to suit logo and text size



The tab format

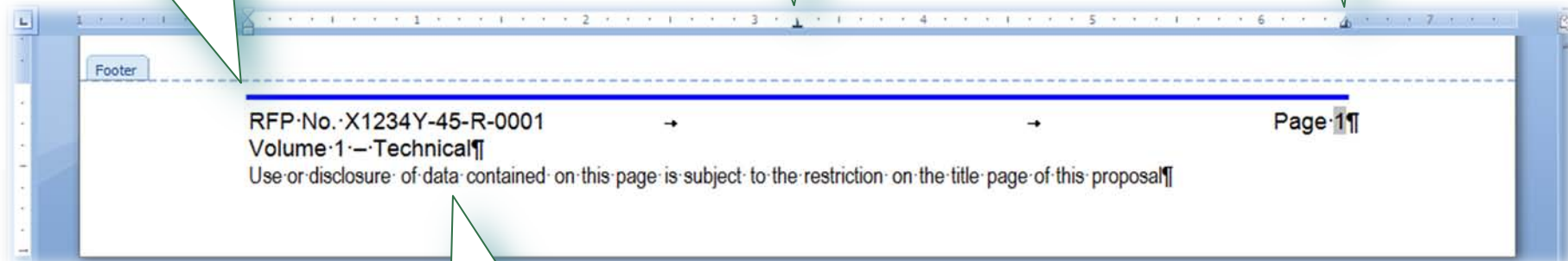


1st paragraph:

- 2.25pt colored top border, 3pt from text
- 6pt spacing before

Center tab at
3.25"

Right tab
at 6.5"



Footer style(s)



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 😊



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



Parent and child styles



Parent, e.g. Body Text


Modify Style

Properties

Name: Body Text

Style type: Linked (paragraph and character)

Style based on: (no style)

Style for following paragraph:  Body Text

Formatting


Child, e.g. Bullet 1


Create New Style from Formatting

Properties

Name: Bullet 1

Style type: Paragraph

Style based on:  Body Text

Style for following paragraph:  Bullet 1

Formatting



Manage which styles are displayed



Click Manage Styles at bottom of Styles pane

Click Show (or Hide for styles you don't want to use)

Manage Styles

Edit Recommend Restrict Set Defaults

Sort order: Alphabetical Show recommended styles only

Select one or more styles to set whether the style appears by default in the recommended list and the order in which the styles appear

last	1 / 1.1 / 1.1.1	(Hide Until Used)
last	1 / a / i	(Hide Until Used)
last	Article / Section	(Hide Until Used)
last	Balloon Text	(Hide Until Used)
38	Bibliography	(Hide Until Used)
last	Block Text	(Hide Until Used)
1	Body Text	(Hide Until Used)
last	Body Text 2	(Hide Until Used)
last	Body Text 3	(Hide Until Used)
last	Body Text First Indent	(Hide Until Used)

Select All Select Built-in

Set priority to use when sorting in recommended order

Move Up Move Down

Make Last Assign Value...

Set whether style shows when viewing recommended styles

Show Hide until used Hide

Only in this document New documents based on this template

Import/Export... OK Cancel

Sort alphabetically to easily find styles you want to use

Set priority value to list styles in order

Assign Value

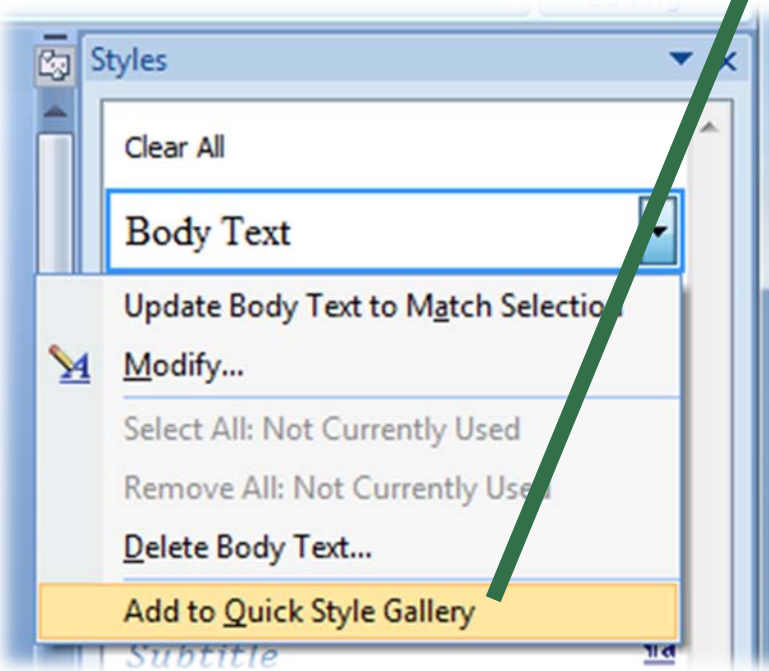
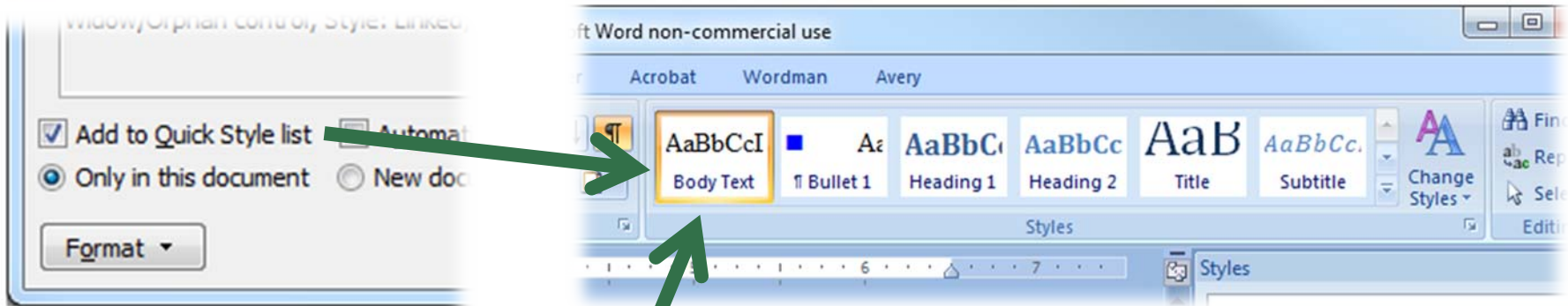
Enter a priority value for the selected styles:

1

OK Cancel



Add styles to Quick Style Gallery



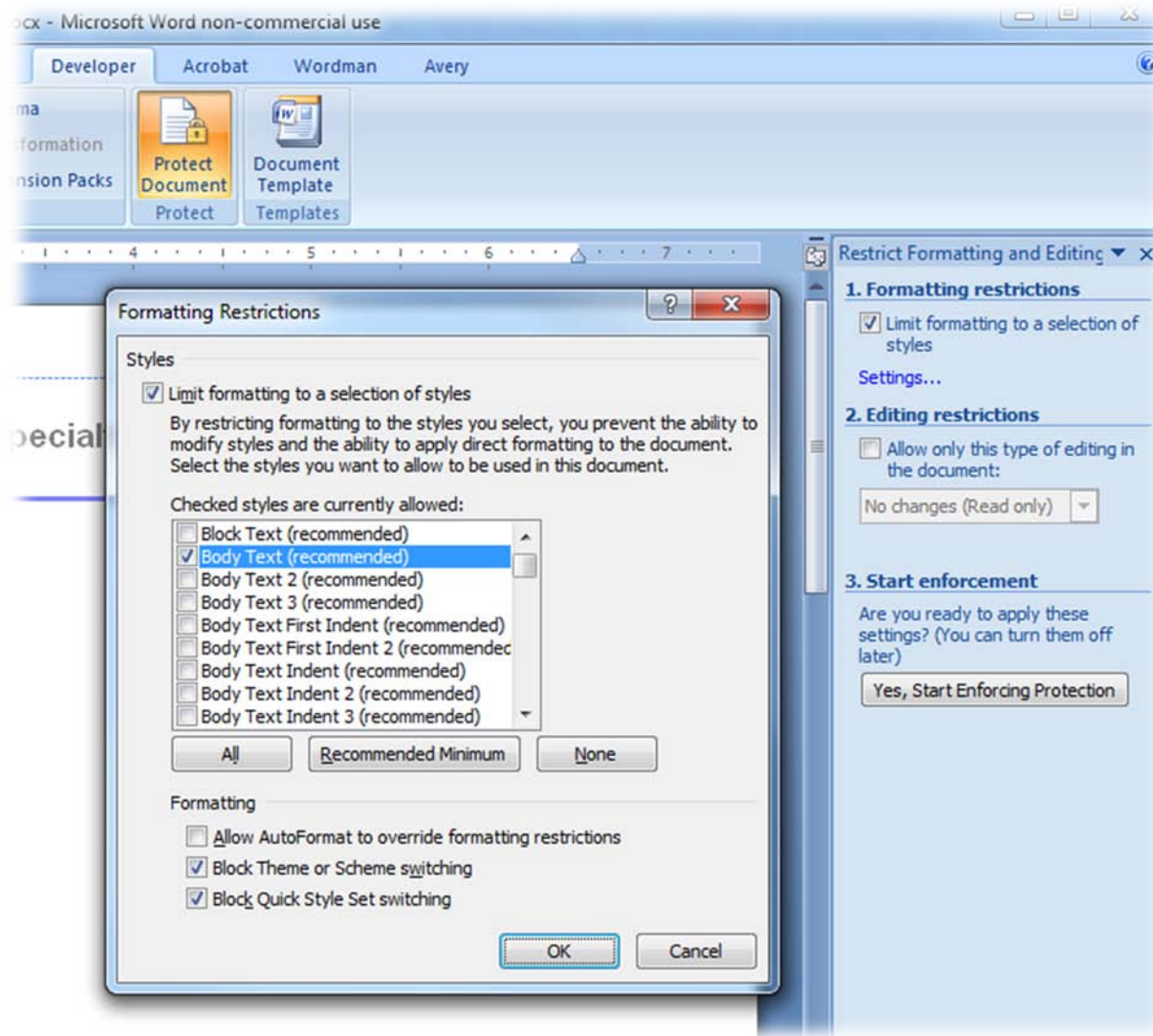
- To add styles to the Quick Style Gallery, either:
1. Check Add to Quick Style list on Format Style dialog, or
 2. Click Add to Quick Style Gallery on Style dropdown
- Styles are displayed in priority order, lowest first



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...







Heading styles

1 Heading 1—
1.1 Heading 2
1.1.1 Heading
1.1.1.1 Headi
1.1.1.1.1 Hez

- 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

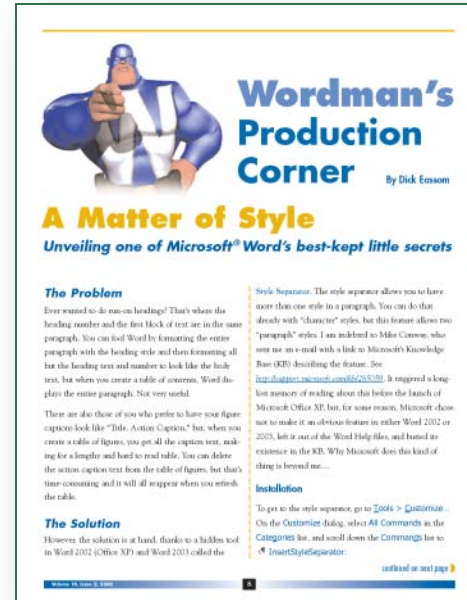


Heading styles (continued)

1 Heading 1—
1.1 Heading 2
1.1.1 Heading
1.1.1.1 Headi
1.1.1.1.1 Hez

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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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



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

Focus-Box-Header-(Table)α

- → Focus-Box-Bullet¶
- → Focus-Box-Bullet¶
- → Focus-Box-Bullet¶
- → Focus-Box-Bulletα

Focus-Box-Header-(Text-Box)¶

- → Focus-Box-Bullet¶
- → Focus-Box-Bullet¶
- → Focus-Box-Bullet¶
- → Focus-Box-Bullet¶

Focus-Box-Header-(Frame)¶

- → Focus-Box-Bullet¶
- → Focus-Box-Bullet¶
- → Focus-Box-Bullet¶
- → Focus-Box-Bullet¶

* calculations are in the notes to this slide



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?					



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



Embedding graphics in more detail



Read Wordman 33: “Almost a Desktop Publisher”

Wordman's Production Corner
By Dick Essom, AEAPMP

Almost a Desktop Publisher

...graphics layouts concepts revisited

The Problem

Thanks to everyone who attended my 7th Annual Wordman Workshop at the 21st Annual APMP International Conference & Exhibits in Orlando. I was extremely grateful to have 75 attendees on the last day of the conference!

As usual, we covered a wide range of Word-related topics. I hope you learnt at least one thing you could use when you get back to your job, and, as I stressed at the beginning of the workshop, I was reminded of a couple of features I had forgotten.

Inevitably, we got to the topic of graphics placement. Many proposal layouts either use a two-column format to maximize text space, or at least place graphics at the top, bottom or corners of the page. Since we all want captions tied to those graphics, we have a number of different ways to achieve the optimum layout. I have my favorite "fixes" but one attendee was a fan of using tables. So, I thought it was time to start off a presentation I gave at the 2003 Annual Conference in New Orleans called "Microsoft Word: Almost a Desktop Publisher" and explain my reasons for processing tables as the optimum tool. Coincidentally, the first Wordman workshop was held at that conference, starting as an ad hoc gathering on the final day.

In the introduction to my 2003 presentation, I explained that desktop publishers are PAGE based, i.e. inserted graphics and other objects are anchored to specific pages, allowing text to flow freely around them. Being a word processor, Word is PARAGRAPH based, i.e. inserted graphics and other objects are anchored to specific paragraphs and, although text can be set to flow freely around them, they will always stay on the same page as the anchoring paragraph. Therefore, understanding how to control paragraph-anchored graphics is the key to successfully managing Word as a desktop publisher.

continued on next page

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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)



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

