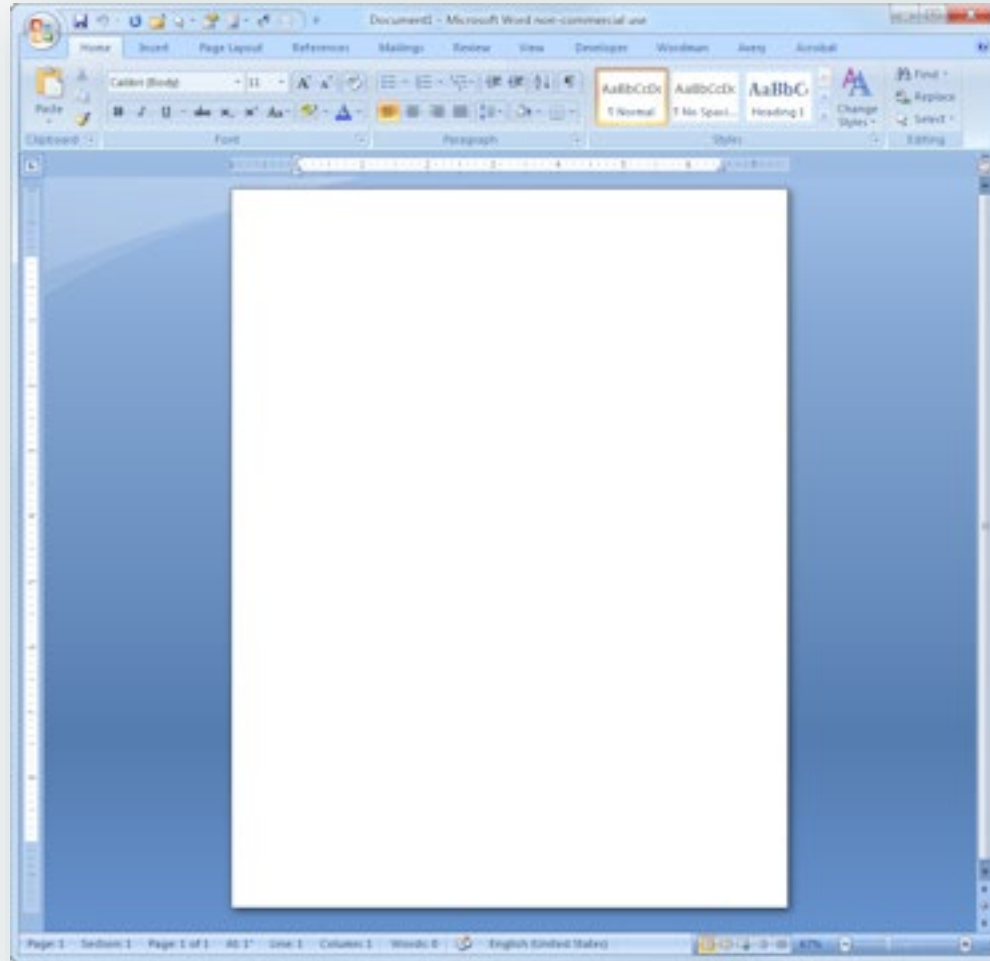*APMP SOCAL Chapter:*

The Proposal Process from Start to Finish

*Start to Finish:
From New Word Document
to Proposal Template*

*Dick Eassom, AF.APMP
(aka Wordman)*

The dilemma
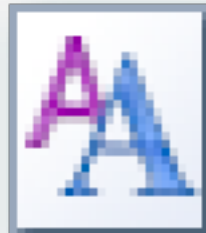
1. Don't Panic!   2. Now what?
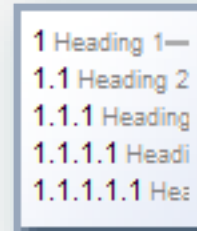
What makes a template?

Page layout: size, margins and columns

Header and footer design

Styles

Heading numbering

1 Heading 1
1.1 Heading 2
1.1.1 Heading
1.1.1.1 Headi
1.1.1.1.1 Hea

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:
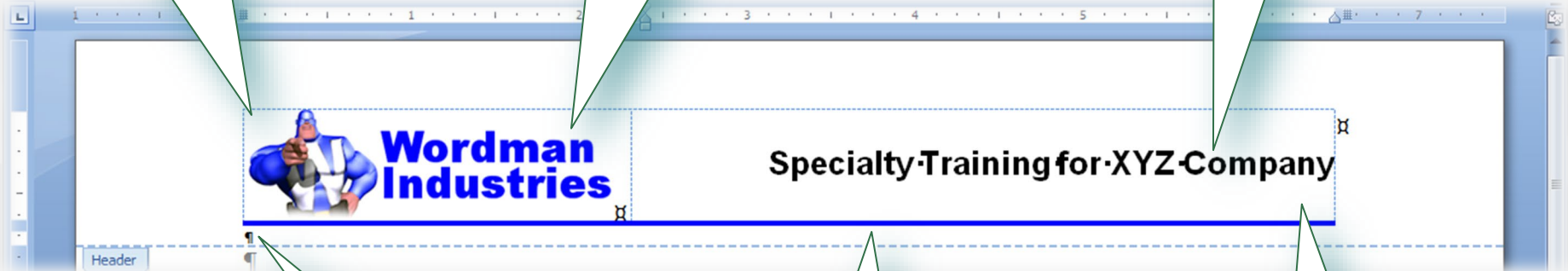 - The table format, the right-align format, and the tab format

The table format

Cell aligned left, left cell margin 0"

Logo at 150ppi, PNG format

Header style

Wordman Industries

Specialty·Training·for·XYZ·Company

Paragraph below table font height set to 6pt
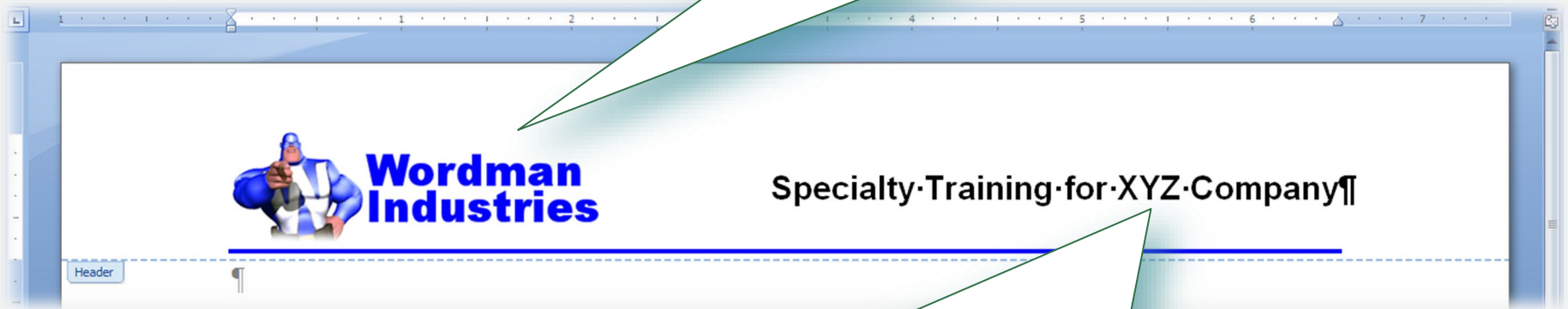
Bottom border 2.25pt colored line

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

Wordman Industries

Specialty·Training·for·XYZ·Company¶

Header

¶

Header style:
- Right-aligned
- 2.25pt colored bottom border, 15pt* from text
- 15pt* spacing before
- 6pt spacing after
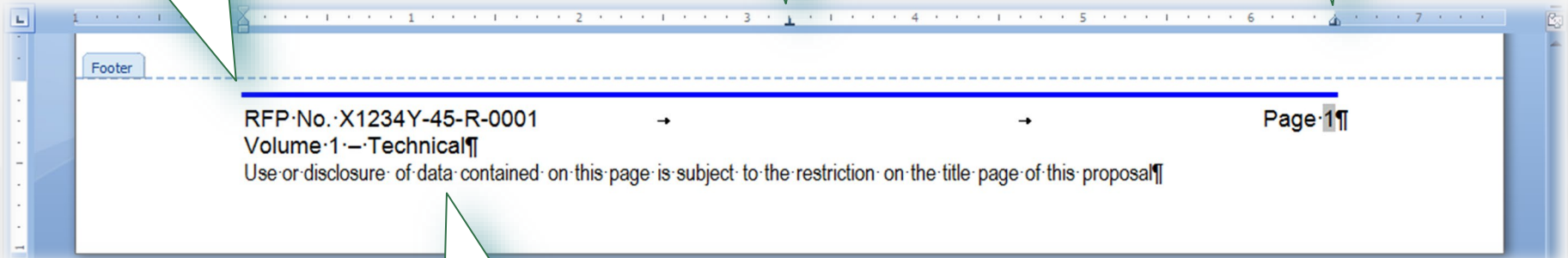
* Adjust to suit logo and text size

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

RFP·No.·X1234Y-45-R-0001 → → Page·1¶
Volume·1·–·Technical¶
Use·or·disclosure·of·data·contained·on·this·page·is·subject·to·the·restriction·on·the·title·page·of·this·proposal¶

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

Child, e.g. Bullet 1

Manage which styles are displayed

Click Manage Styles at bottom of Styles pane

Sort alphabetically to easily find styles you want to use

Set priority value to list styles in order

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
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
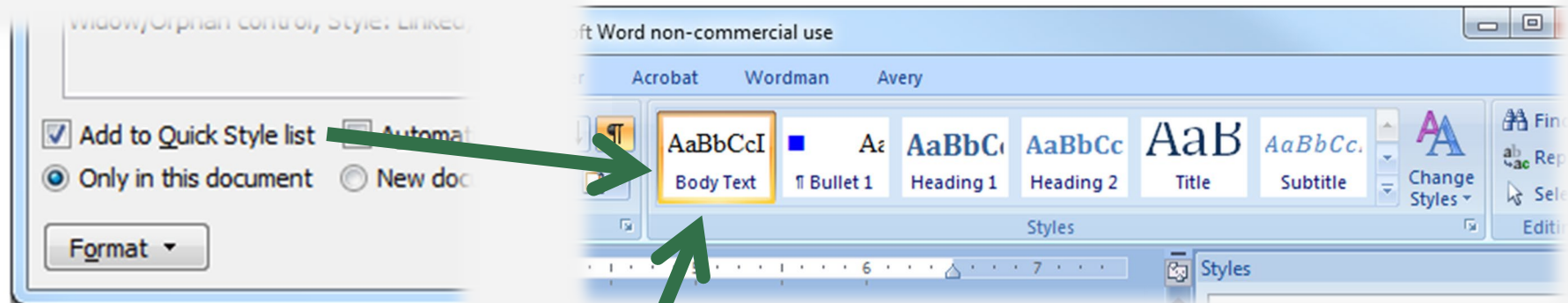
Assign Va

Enter a priority value for the selected styles:

1

OK   Cancel

Add styles to Quick Style Gallery
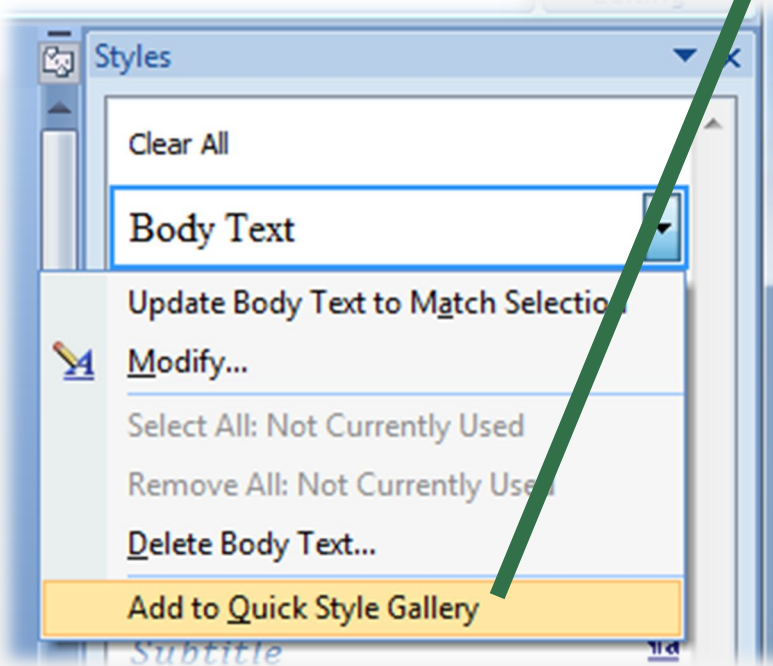
To add styles to the Quick Style Gallery, either:
1. Check Add to Quick Style list on Format Style dialog, or
2. Click Add to Quick Style Gallery on Style dropdown

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…
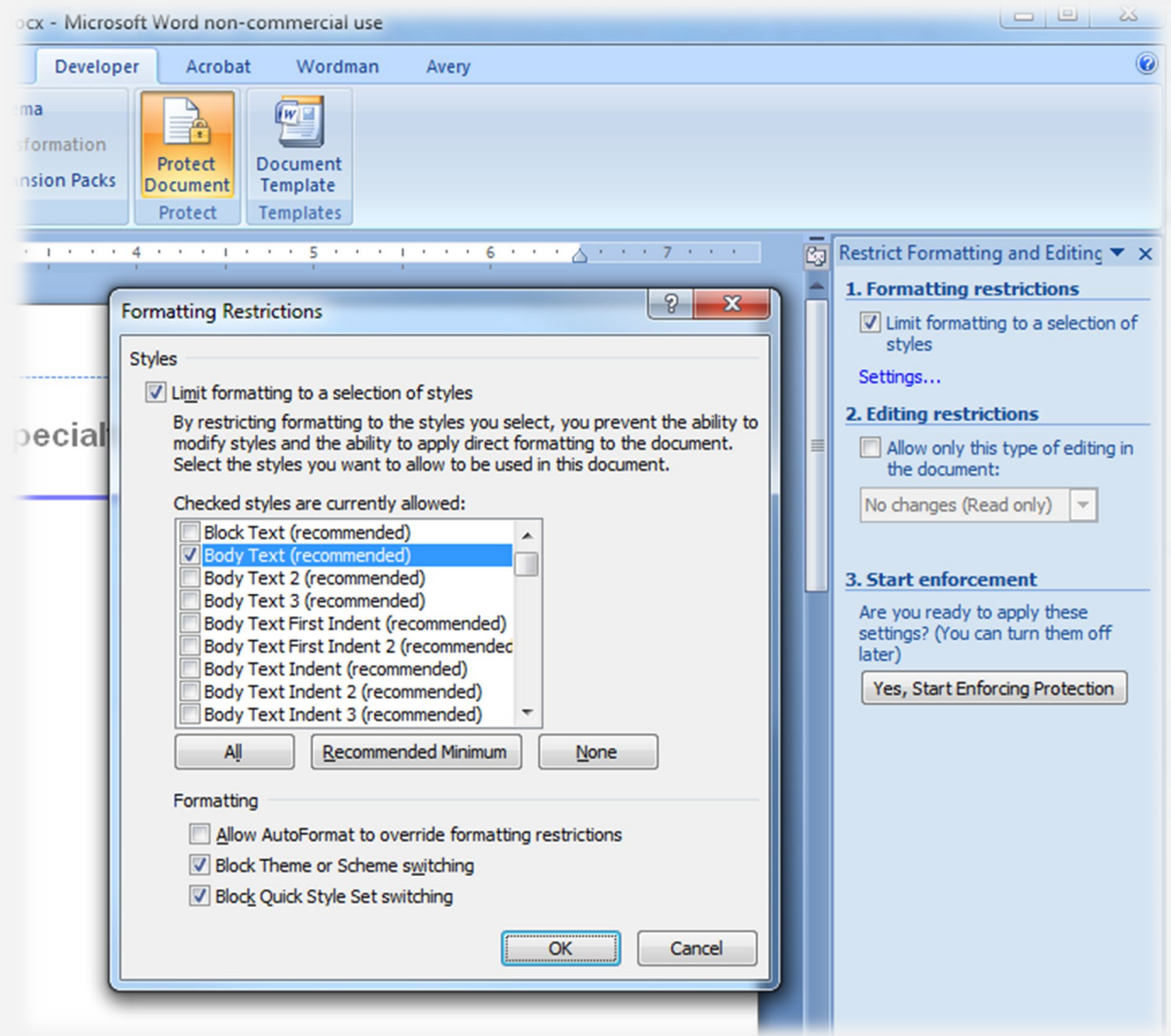
Heading styles

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

	Manual	Automatic
👍	• Easy to use • Easy to manage unusual numbering sequences	• Heading numbers automatic • Can cross-reference to headings • Can use chapter numbers in figure captions, page numbers
👎	• Cross-references to headings must be inserted (and updated) manually • Number sequence must be inserted and checked manually	• Need to manually set sequence starting number if not "1" • Need to use hidden text to manage unusual numbering sequences

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"
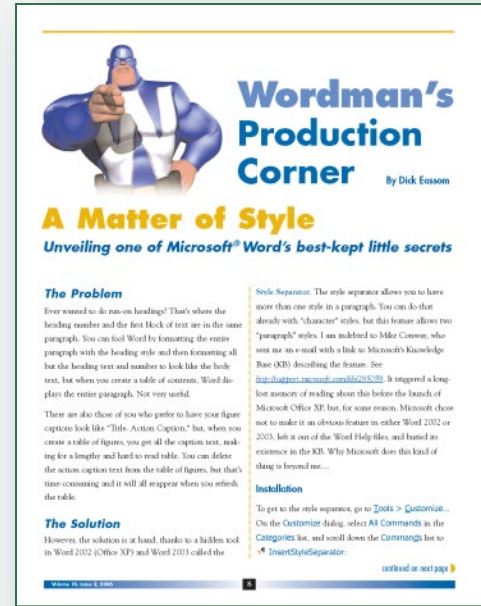
www.apmp.org/?page=WMArticles

Focus boxes

	Use a frame	Use a floating table	Use a text box
👍	• Reapplying FB styles restores size, color and position • Frame vertical height expands automatic-ally as text is added	• Table row vertical height expands automatically as text is added	• Full range of border, shading, and effects formatting available (dubious benefit?)
👎	• FB styles must contain identical frame information, or FB will split up! • Difficult to create sub-bullets • Limited formatting available	• Limited formatting available • Table must be repositioned and resized manually if accidentally moved	• 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 boses

- 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

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"

www.apmp.org/?page=WMArticles

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
👍	• Can contain any style, e.g. for nested table • Only needs two styles: Artwork and Caption	• Reapplying styles relocates and resizes frame • Visible anchor allows easy relocation of frame to another paragraph
👎	• No visible anchor • Automatic caption numbers can get out of position when two-column page contains more than one single-column table	• 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"

www.apmp.org/?page=WMArticles

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