Things I Wish Proposal Writers Knew About Word

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This is for those of us who have to take multiple Word documents, with graphics and tables, and integrate them into a professional, compelling, winning proposal!

Don't you wish that if your writers (and other contributors) knew a bit more about Word, then your job would be much easier?

This presentation contains tips for writers to get the best results (plus a few for you to consider!)

Getting your writers to follow these guidelines will save you hours of stressful integration during end game!

Don't paste that into my proposal!

- Writers obviously need to reuse material from old proposals, technical documents, PowerPoint presentations, and even websites
- Content copied and then pasted into Word can:
  - paste styles and formatting that do not comply with your proposal template
  - be non-compliant due to font size or face
  - occasionally corrupt existing styles in your document
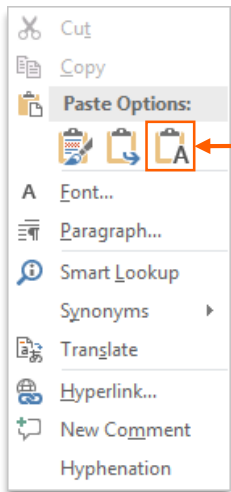- This can cause problems during end game—for you!
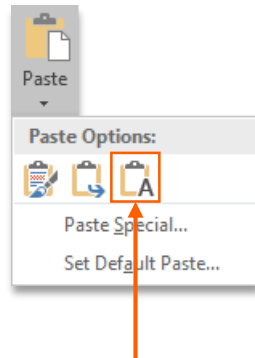
What can writers do to help you?

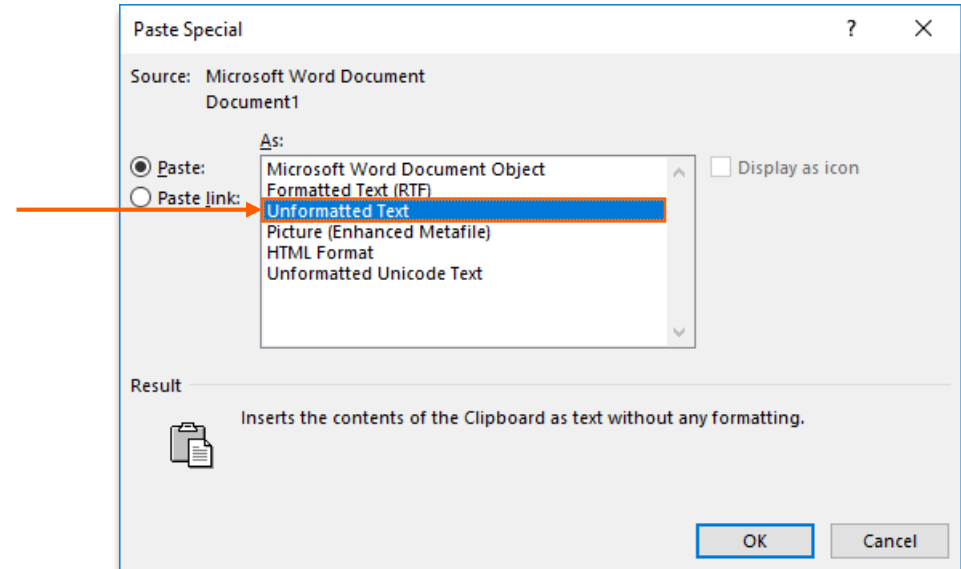• Always Paste Special > Keep Text Only

How?

Right click >
Paste Options:

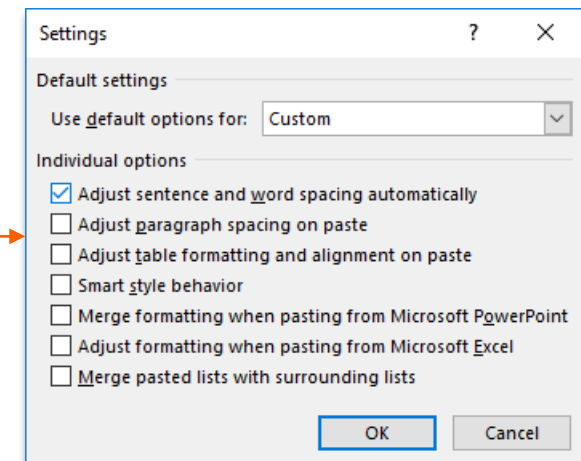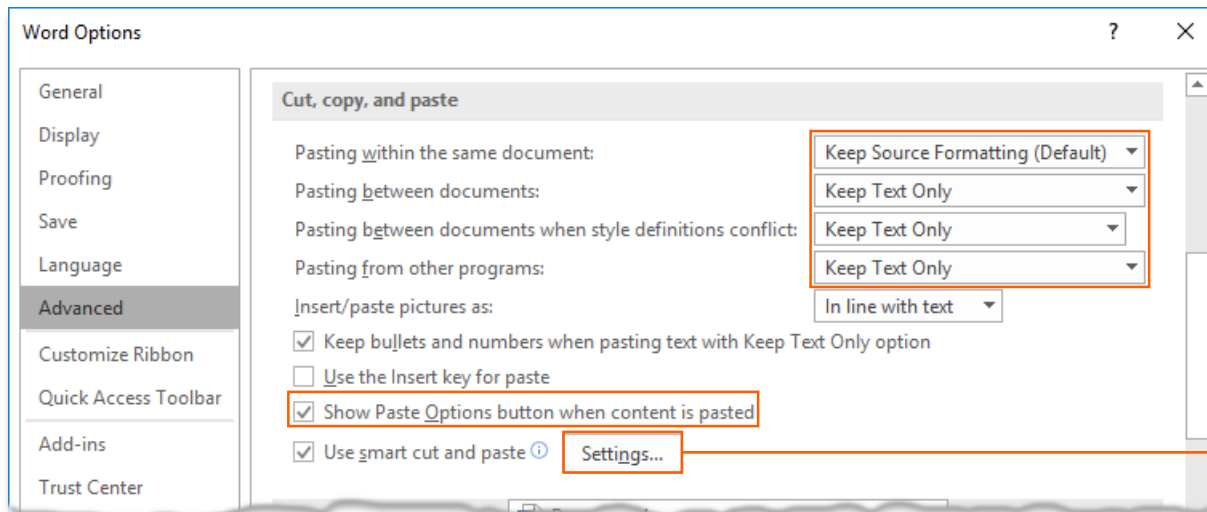Home > Paste >
Paste Options:

Ctrl+Alt+V

Don't paste that into my proposal! (cont.)

The optimum solution: get writers to set default paste

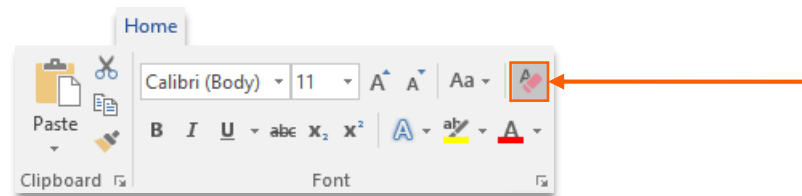• Go to Home > Paste > Set Default Paste…

How to paste that table into my proposal!

If you don't want to lose the structure of a table:

• Copy tables separately from the regular text

• Paste, but click the Paste Options button and choose Merge Formatting:

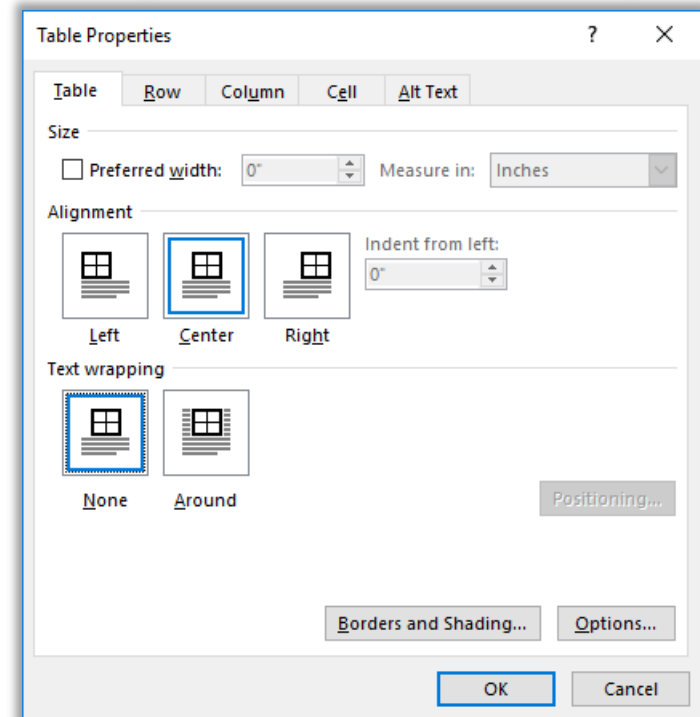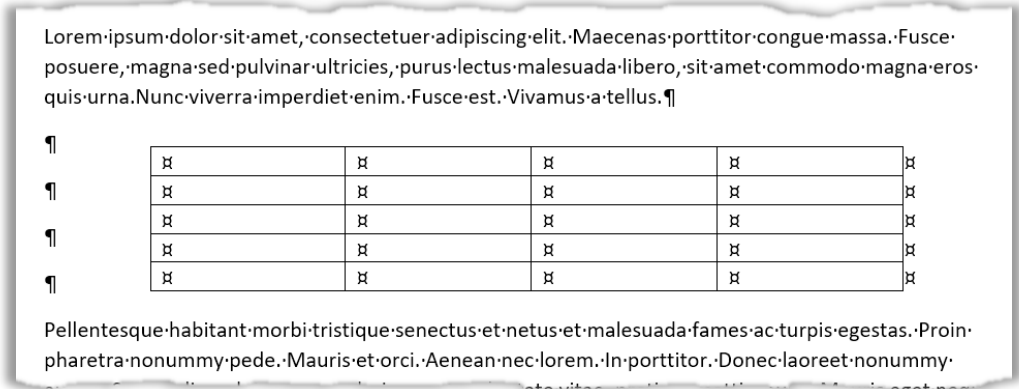

• Clear all (text) formatting

• Apply the table style provided

Sink your floating tables

How many times have you seen this?

- There is no default setting for how tables are created (or inserted), but floating tables sometimes get in your documents
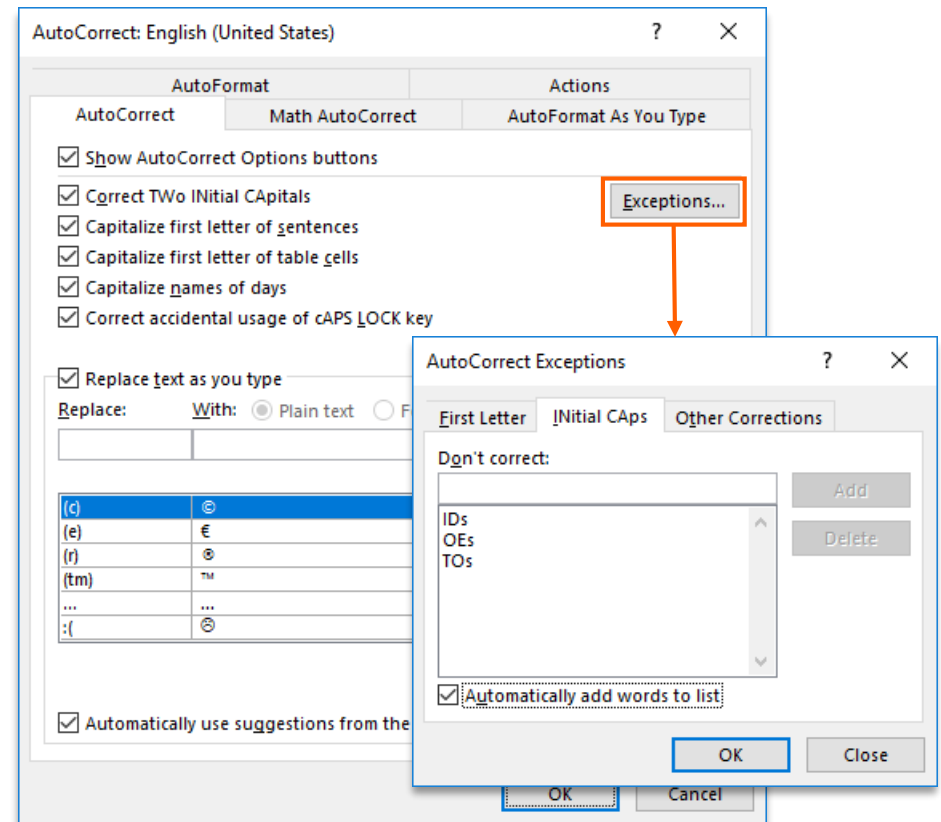
- Go to Table Tools > Layout > Table > Properties
- Set Text wrapping to None

Autocorrect can be a friend or foe to writers

- You can add common exceptions: go to File > Options > Proofing > AutoCorrect Options…

- Delete legitimate Replace text as you type entries

- Click Exceptions
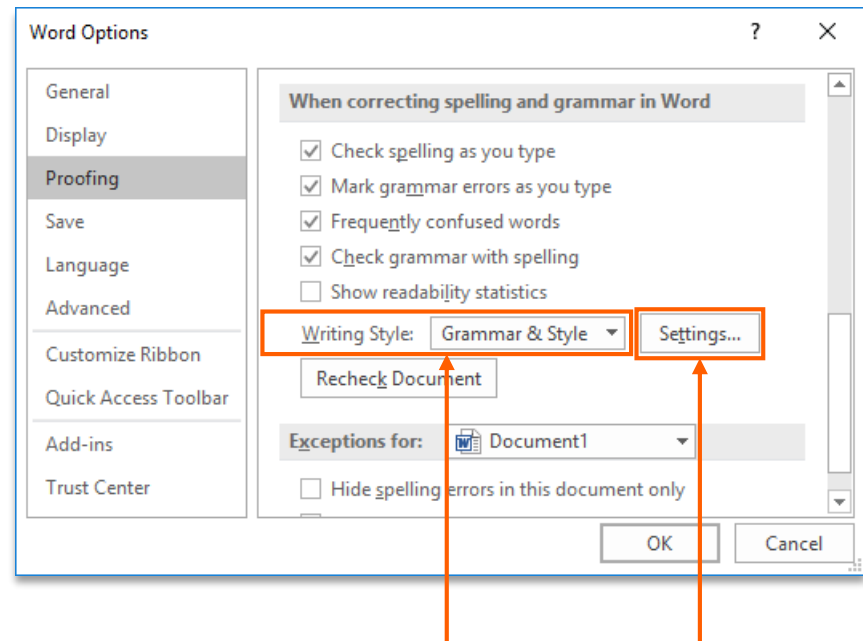
- Add Initial Caps options relevant to your business

Check your spelling, grammar, and style

First person, active voice, present tense…

- It's not always easy for writers to write this way, so this time, Word **CAN** help!

How?

- Go to File > Options > Proofing
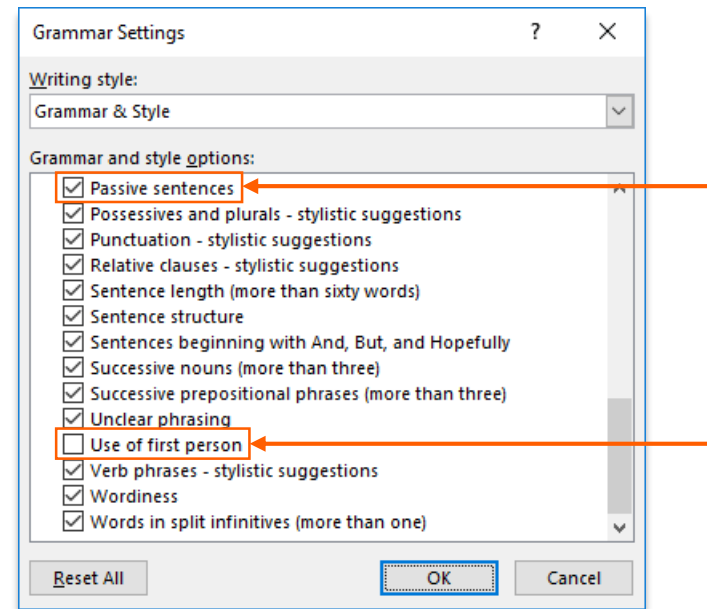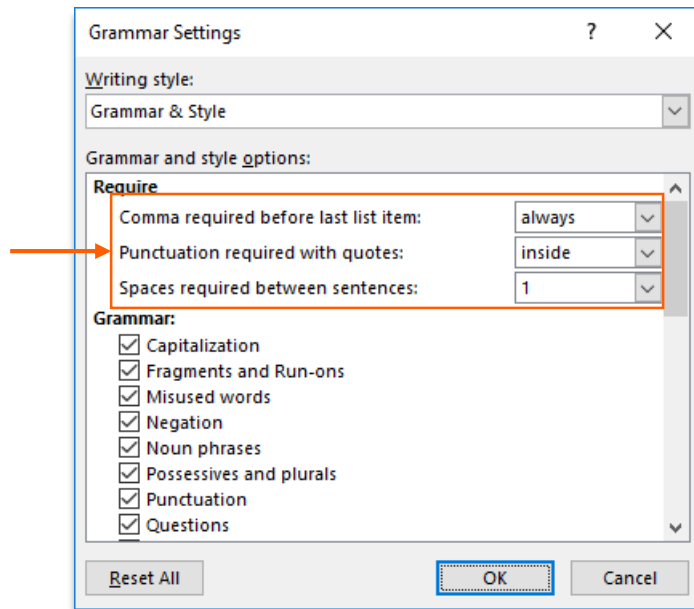- Set Writing Style to Grammar & Style
- Click Settings…

Check your spelling, grammar, and style (cont.)

Comma required before last item – the "Oxford comma"
Punctuation between quotes – inside
Spaces required between sentences – 1

Passive sentences – checked
Use of first person – unchecked

Only one space, please

Back in "the day," typewriters and computer printers only had fixed-width (aka monospaced) fonts:

`The Quick Brown Fox in Courier`

And we were taught to put two spaces after a period to make the ends of sentences more noticeable.

And then along came the laser printer, and proportionally-spaced (aka proportional) fonts were available:

The Quick Brown Fox in Times New Roman

And we no longer need to put two spaces after a period. Ever.
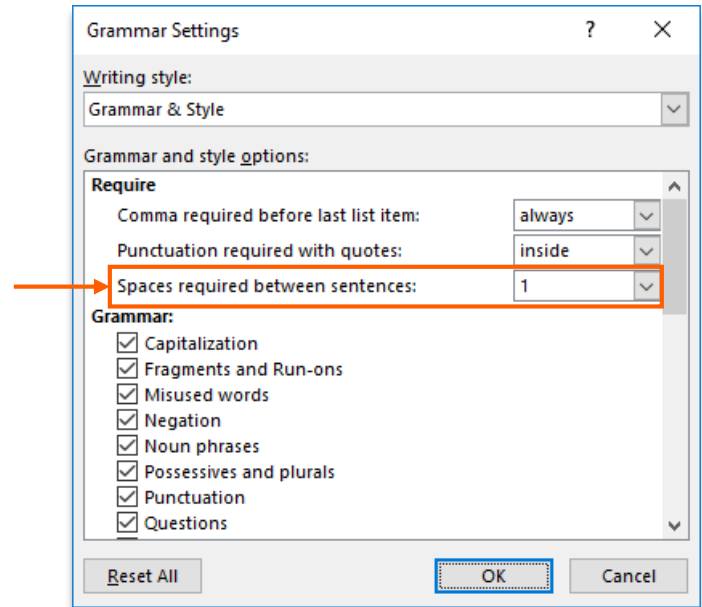
Only one space, please (cont.)

What can writers do to help you?

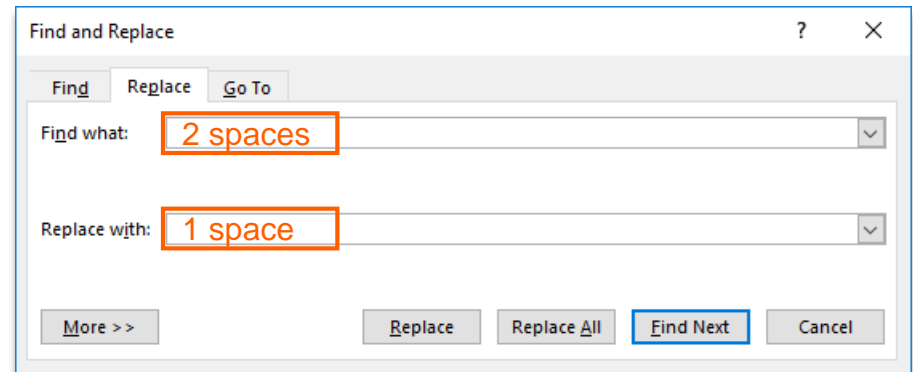- Get Word to show them when they more than 1 space after a period

How?

- Set Spaces required between sentences to 1

And if they forget, press Ctrl+H, type two spaces in Find what, one space in Replace with, and then click Replace All until there are no more left!

No autoformatting, please!

Word tries to "help" as you type:

- Type 1. and press any key, and Word thinks you want a numbered list:

- Type * and press and key, and Word thinks you want a bulleted list
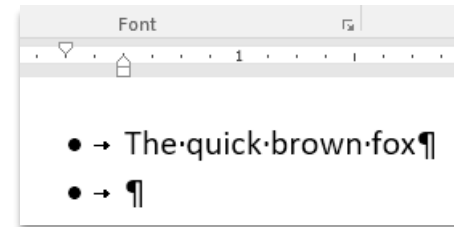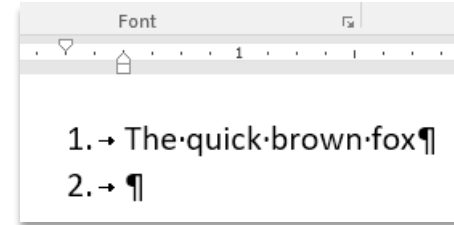
But this interferes with our List Number (X) and List Bullet (X) styles in our proposal template

What can writers do to help you?

• Disable AutoFormat options

How?

• Go to File > Options > Proofing
• Click AutoCorrect Options…
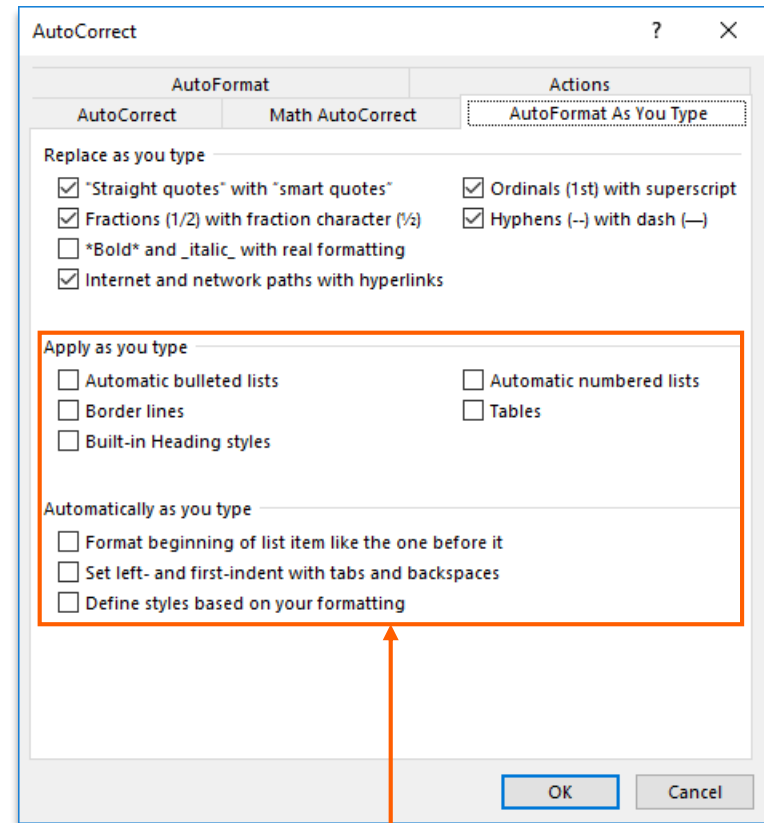• Select AutoFormat As You Type tab
• Uncheck all Apply as you type and Automatically as you type options

Don't type over my fields & content controls!

Fields automatically generate text, based on their code
- Typical examples are page numbers, caption numbers, and cross references:

{ PAGE }

Figure { SEQ Figure * ARABIC }: Action Caption

See { REF _Ref495151563 \h }

→

1

Figure 1: Action Caption

See Figure 1

- Content Controls allow selectable text, such as a date, or act as content placeholders:

[Submission Date] → Submission Date [Submission Date] ▼

October 2017
Su Mo Tu We Th Fr Sa
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31 1 2 3 4
 5 6 7 8 9 10 11

Today

→ October 7, 2017

- Writers can accidentally delete or overwrite either of these tools

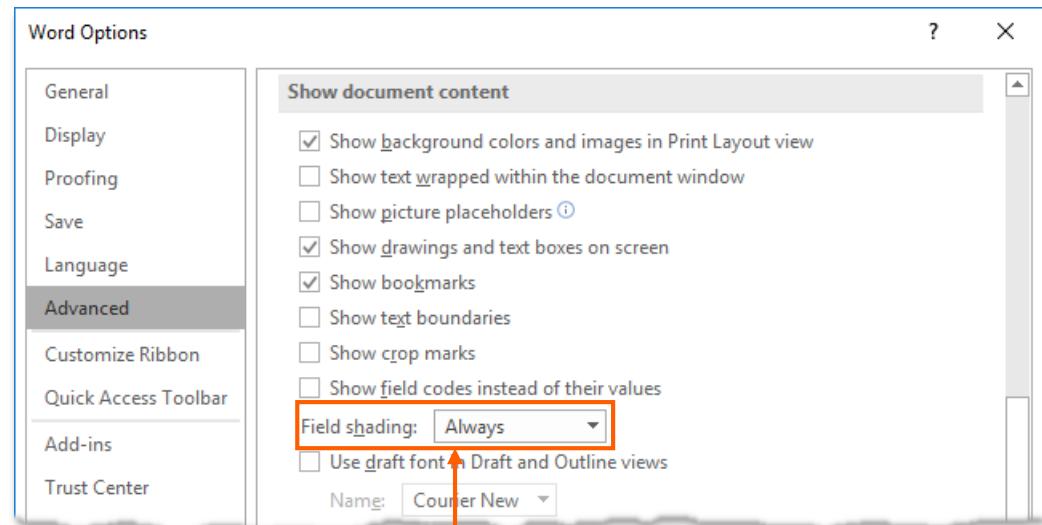# Don't type over my fields… (cont.)

What can writers do to help you?

- Permanently display when text is generated by a field code

How?

- Go to File > Options > Advanced
- Scroll to Show document content
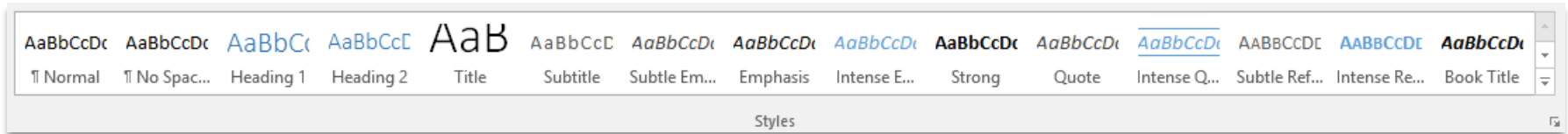- Set Field shading to Always
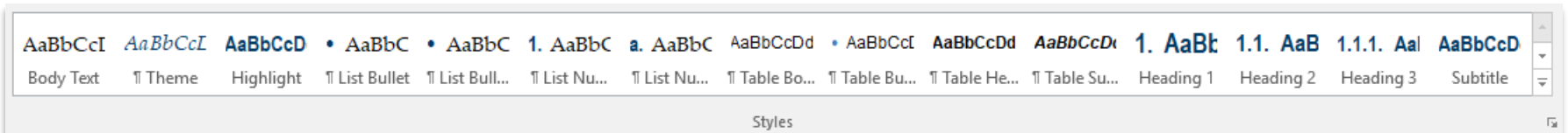

(Content Controls are always visible)

Don't DIY: use the styles I provided

The easiest solution to getting writers to help you!

- Word's default styles, courtesy of normal.dotx:

- Styles from a custom-designed template: all the writer needs!

- See my APMP Bid & Proposal Con presentation and APMP *Perspective* articles: give me your business card and I'll email

That's not how you do an indent!

Ever had this one?

> ················Video·provides·a·powerful·way·to·help·you·prove·your·point.·When·you·click·Online·Video,·you¶
> ···············can·paste·in·the·embed·code·for·the·video·you·want·to·add.·You·can·also·type·a·keyword·to¶
> ···············search·online·for·the·video·that·best·fits·your·document.·To·make·your·document·look¶
> ···············professionally·produced,·Word·provides·header,·footer,·cover·page,·and·text·box·designs·that¶
> ···············complement·each·other.·For·example,·you·can·add·a·matching·cover·page,·header,·and·sidebar.¶

This can happen:

- When text is pasted in from a PDF that has been OCR'd
- When the writer has no idea how to indent text, or create a hanging indent

As usual, there are multiple ways for writers to create indents…

- Ideally, you'll have a Body Text Indent style in your template, but you can't deal with every scenario…

- Use the shortcut keys:
    - Ctrl+M – increase left indent by one tab stop
    - Ctrl+Shift+M – decrease left indent by one tab stop
    - Ctrl+T – increase hanging indent by one tab stop
    - Ctrl+Shift+T – decrease hanging indent by one tab stop
- Use the ruler:
    - Check View > Ruler if it is not displayed
    - Drag ▽ to change the First Line Indent
    - Drag △ to change the Hanging Indent
   - Drag ☐ to change the Left Indent
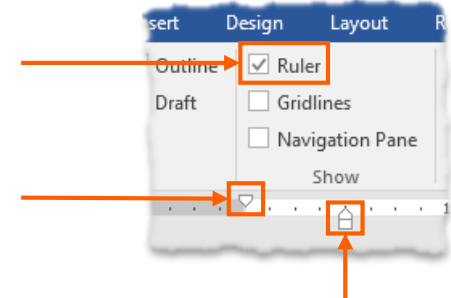
Templates & documents: what's the diff?

- Some define a 'template' as a Word document pre-populated with headings and default text…
- A Word template can be that too, but it is used to create new Word documents
- The new document contains:
  - The same page layout as the template (margins, headers, footers, columns, etc.)
  - The same styles as the template
- The new document does not contain:
  - Any Quick Parts, aka building blocks, in the template
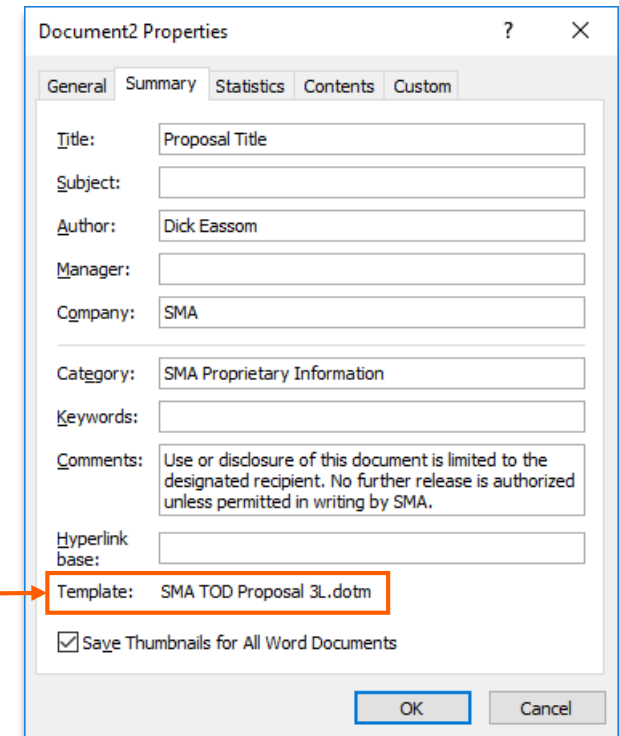 - Any macros in the template

All documents remember their template:

- Go to File, click Properties, and then click Advanced Properties:
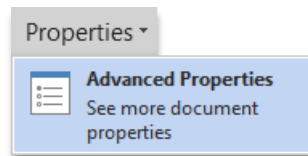
- The Document Properties dialog shows the template name that the document was created from:

- You can use this document–template relationship to restore styles to their original definition, even if the writer has modified them

First, make sure you have the Developer tab displayed:

- Go to File > Options > Customize Ribbon, and check Developer in the right box:
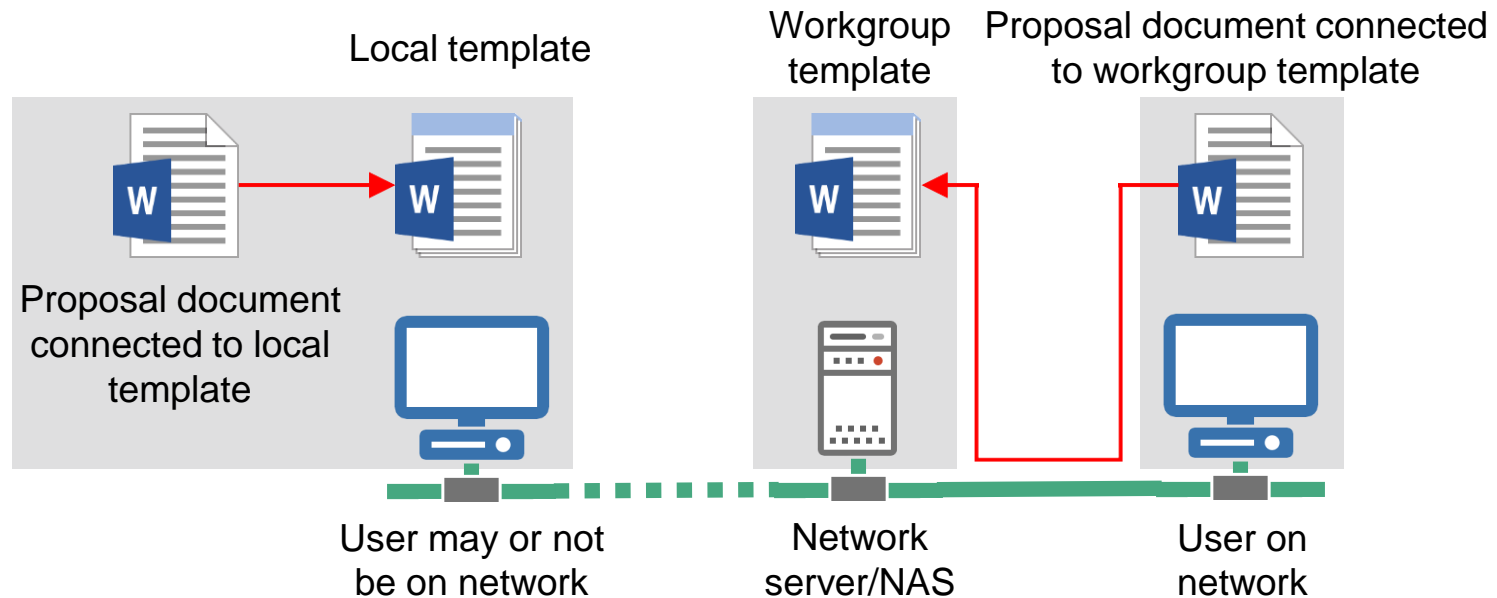
- Now go to Developer > Document Template:
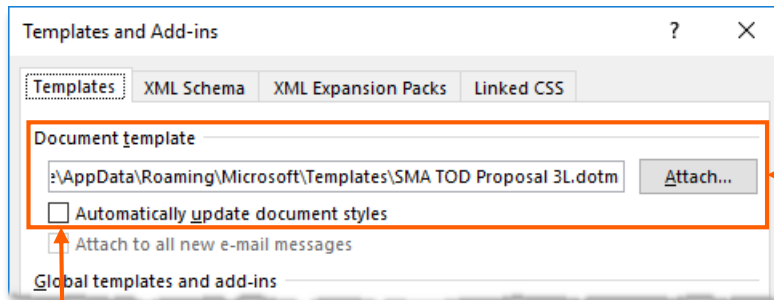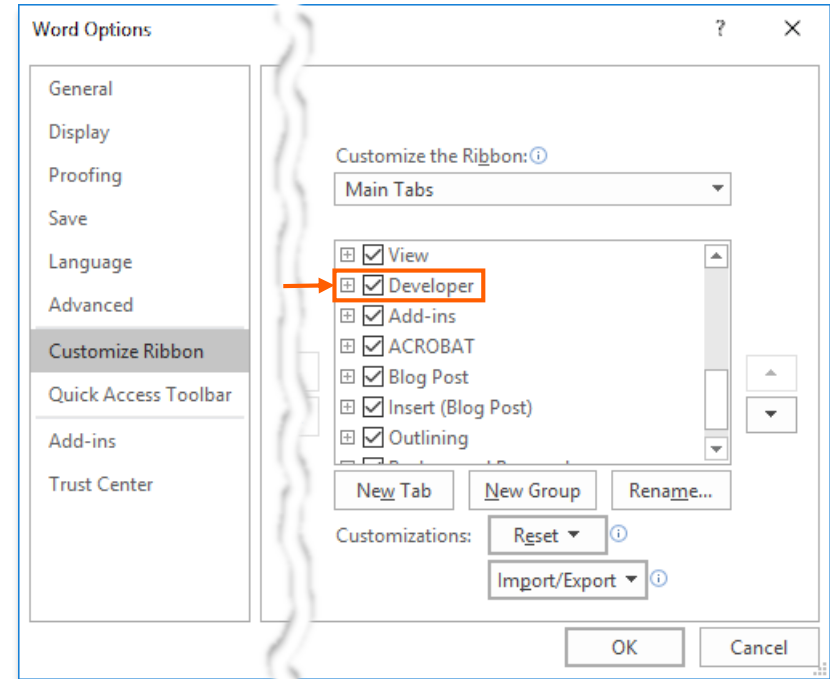
If this is the wrong template, click Attach and browse to the correct template

Check Automatically update document styles to fix styles

You can help your writers by distributing the .dotx template

- You can either distribute the template to each user, or set up a workgroup shared location

Local template

Workgroup template

Proposal document connected to workgroup template

Proposal document connected to local template

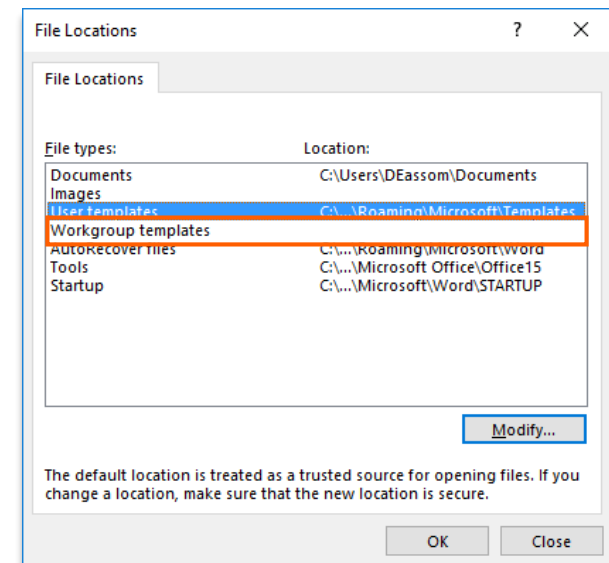User may or not be on network

Network server/NAS

User on network

Templates & documents (cont.)

Personal template: save to %appdata%/microsoft/templates. Go to File > Options > Save and enter path into Default personal templates location:
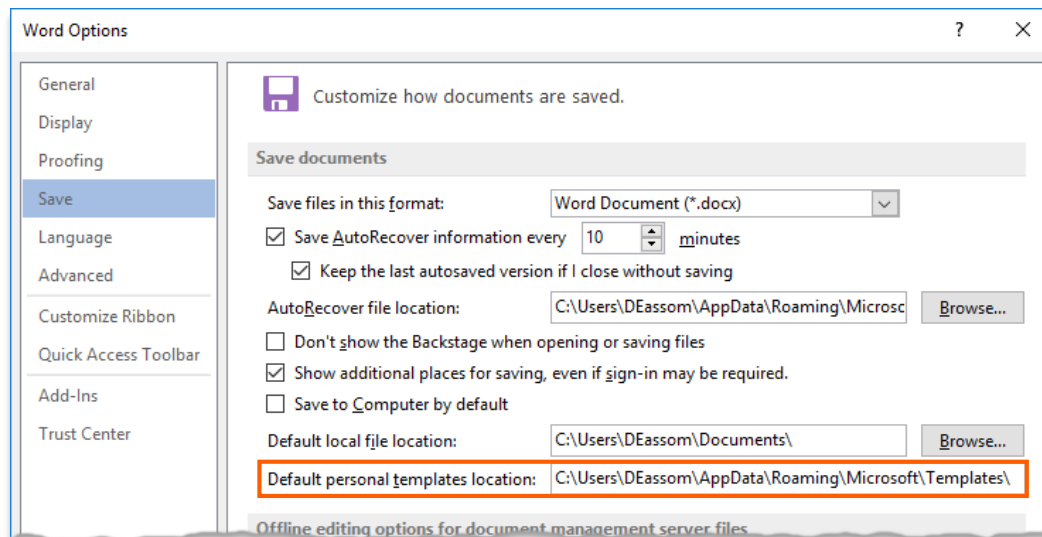
Workgroup: go to File > Options > Advanced > File Locations and enter path in Workgroup templates:

APMP CALIFORNIA CHAPTER

Some of my pet hates:

- …including, but not limited to,… → …including…
- …to include… → …including…
- …in order to… → …to…
- …five (5)… → …five…

(use numerals above ten)

Some of these habits are hard to unlearn, but the benefits of improved readability, extra space for content, and less editing time, are obvious

Don't overinitialcapitalize!

- Not every noun is important!
- And we're writing in English, not German!
- Does "Project Manager" really need those initial caps?

- Over initial capitalization makes text harder to read, and takes up more space

- And capitalization can really change a sentence. For example:
  - I love to eat candy
  - I love to eat capitalization

Bonus round: who's into hyphenation?

- Word has excellent hyphenation tools:
  go to Layout > Page Setup > Hyphenation

- To make them easier go get to, add to your QAT

- Go to File > Options > Quick Access Toolbar

- Select Choose commands from > Layout Tab

- Scroll down to Hyphenation Manual

- Click Add >>
  to add to your
  QAT
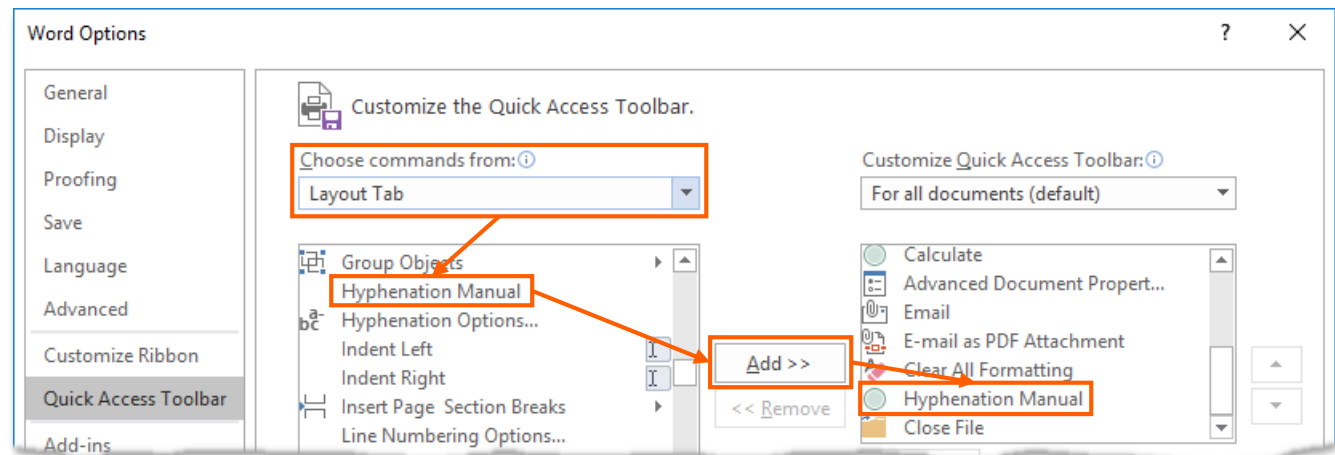
- Unfortunately, Hyphenation Manual doesn't have a real icon:

- But to use it, select the word you want to hyphenate, the click the Hyphenation Manual icon

- Word displays the Hyphenation Manual dialog with the selected word and shows where you can correctly hyphenate it

- Select the hyphenation point you want and then click Yes
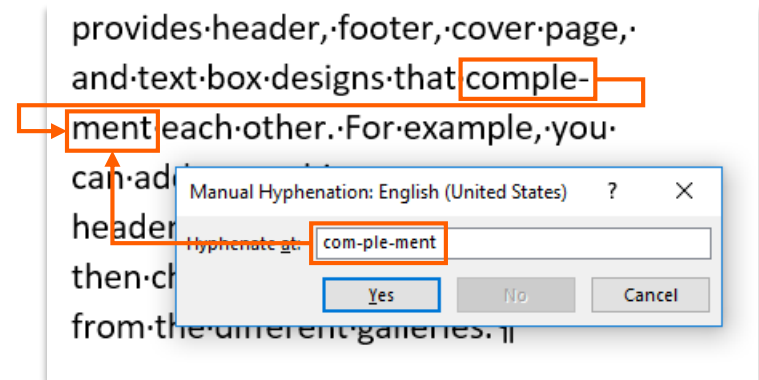
Hyphenation can improve readability and save space when using narrow columns

You can find Wordman at…

www.iamwordman.com

word.man@cox.net

twitter.com/IAmWordman

www.facebook.com/iamwordman

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