

Design tasks

The previous chapter covered the process of manipulating the content of the book. Now let's switch gears for a discussion of how that content is going to look.

I'd like to pause a minute to point out that the process of going from author to editor to typesetter to designer to printer does not have to be a perfectly linear process. In fact, many times these roles get all mixed up and tasks are done out of order. For example, you might have a graphic artist design the book and provide you with a template to use while writing. That way, you could live with the design for a while and decide whether it suits you. Some tasks have to be done prior to others, but what is particularly interesting about wearing multiple hats is that you find out how important it is for each of the participants to work together and make each other's job easier.

Choosing a size for your book

One of the most critical decisions, one that will impact virtually everyone else's job, is the size of your book. You need to decide on a size before you can make design decisions regarding type size and column width. It also must be done before you begin scanning any photographs or sizing tables. Your size decision will determine the amount of space the book takes up on the shelf and the envelope you'll need to fit it in for mailing. It will also have implications for the book's binding method and the cover.

For the sake of simplicity, I strongly recommend that you choose a size based on a standard 8½” x 11” sheet. Use of this standard size will simplify production and keep the overall cost of the job down. The 8½” x 11” size is also well suited to digital printing devices that will print cost-effective short print runs (as opposed to offset printing presses that are the traditional method for printing many copies of books). If you have your heart set on an unusual size, go ahead and see what kind of price your print shop offers you. Print shops can do many things for you, but they are most effective (and they will give you the best price) when you ask them to do things that are easy for them.

It is possible to create books or booklets using common paper sizes other than 8½” x 11”. (For example, 11” x 17” and 8½” x 14” sheets are commonly available in digital print and copy shops.) It is also possible to create books and booklets made from folded 8½” x 11” sheets (or even folded 11” x 17” or 8½” x 14” sheets). You can take advantage of these sheets to produce books and booklets in a variety of sizes. You can even use Microsoft Word to create a page of just about any size. It’s just that when you move away from an 8½” x 11” page, things get a lot more complex.

For example, half of an 8½” x 14” sheet is 8½” x 7”, which is very close to a typical 9”-high by 7”-wide paperback. You could create an 8½” x 7” layout in Word, but your print shop would have to have the expertise (and software) to print your 8½” x 7” layout twice side-by-side on an 8½” x 14” sheet. This so-called 2-up layout would then be printed in proper page order and trimmed down the middle into two 7” x 8½” unbound book blocks. With the right software this isn’t hard to do, but you can’t assume that any print shop will be able to do it. And it’s not as simple as printing out an 8½” x 11” book and binding it.

If you do choose to use a size other than 8½” x 11”, be sure to consult with your print shop very early in the process. You need to

be sure that these decisions about the format of your book do not create production problems for the print shop.

Fonts and typefaces

A font is a computer file that determines how letters are rendered on your computer screen or printer. The terms “font” and “typeface” have a similar, but not identical meaning. A font is the source of a printed (or viewed) letter shape. A typeface, on the other hand, is the printed (or viewed) result of a font. For example, if you had a rubber stamp with the letter “A” on it the rubber stamp would be the font, and the printed result would be the typeface. With a computer, the font is the actual source computer file with the information on the shape of each letter.

If you use Microsoft’s Windows operating system on your computer, chances are that you are using “TrueType” fonts. Later on in the “Production tasks” chapter you will read about another kind of font called a PostScript font. You can use either type, but for reasons that will become clearer later, I recommend that you find and install some PostScript fonts on your machine. If you attend printing trade shows, you may be able to get a free CD from Adobe Systems (one provider of PostScript fonts) that includes some PostScript fonts. You can also purchase from Adobe a collection called Type Basics, which includes sixty-five PostScript fonts for \$65. Look for additional information on Adobe’s web site: <http://www.adobe.com>

An Adobe font utility called Adobe Type Manager (ATM) is another useful tool that helps you install the fonts on your computer.

You really don’t need very many fonts to do a book. In general, a sans-serif font for the headings and a good readable serif font for

the text will do.²⁵ I have used Adobe’s Garamond previously because it is easy to read and I like the way it looks. This book’s text is set in Goudy. The headings are Adobe’s Myriad Roman. Both typefaces come with the full suite of fonts, including roman, italic, bold, and bold italic. (This avoids any computer-generated imitations of the italic or bold variations.)

Figure 8 – A serif typeface (left) next to a sans-serif typeface (right)

Word Word

Intelligent selection of fonts can make your words look good in print. Poorly chosen fonts can make your book unreadable. We’ll discuss fonts in greater detail in the “Production tasks” chapter.

Working with Word templates

Once you have determined a size for your book, then you need to find, adjust, or create a Microsoft Word template that is appropriate for your document. A Word template contains the instructions for the fonts, spacing, and other parameters used to format the document.

I’m going to assume that you have installed the required fonts. However, you should go through the exercise in this chapter even if you haven’t. You can always go back and change your fonts later.

Books generally have a few key design elements. Microsoft Word provides you with the ability to create a template that includes

²⁵ If you have never heard of serif and sans-serif fonts, then compare the type in the headings and text of this book. The chapter headings are sans-serif. The text is serif. The strokes of the serif text are more elaborate and finish with fine lines and small embellishments. The strokes of the sans-serif chapter headings are not adorned with any extra embellishments.

styles that will make it easy for you to format your book. In this section, I'll show you how to create a set of styles for your book. These styles will cover:

- Headings and subheads
- Body text
- Headers and footers
- Tables of contents and indexes
- Title page elements
- Other elements like notes or tables

To start, open a new document in Word. Whenever you open a new document in Word, Word will ask you which template you want to use. Choose “Blank Document” under the “General” tab. This will open a new document based on the “General” template.

Setting the page size and margins

To set the page size and margins, go to the “Page Setup” selection under the “File” menu. This will display four tabs:

- Margins – This tab allows you to set the margins between the edge of the page and the text block. It also allows you to position the header and footer. The default margins (1” on the top and bottom and 1.25” on both sides) give your page plenty of breathing space. If you click the “Mirror margins” box, Word will show you two facing pages and allow you to make adjustments on them. I recommend that you stick to the simple one-page view. The default positioning for the headers and footers (½” from the top and bottom) is also good. Any of these figures can be adjusted if you wish to gain more space for text or increase the margins.
- Paper Size – The default paper size is a portrait letter page (i.e., 8½” x 11”). Leave this as is unless you want to use another paper size.

- Paper Source – This tab refers to the printer’s paper tray and does not need to be altered.
- Layout – Among other things, this tab allows you to set whether your headers and footers are different for right- and left-hand pages. Most books have different right- and left-hand headers/footers, so check this box. You can also set a different header/footer for the first page of a section, and you may wish to do this if you don’t want a header/footer to appear on the title page. Unfortunately, Word has a number of quirky features and setting a different header/footer for the first page of a section is one of them. I have found that the header/footer of the first page is sometimes corrupted for some unknown reason when the table of contents or index is updated. You should pay close attention to these headers, particularly if you try to include graphics within the header. If you want a more secure workaround for eliminating the header/footer from certain pages, you can cover a header/footer with an opaque white text or graphic box. (This is the electronic version of “white-out”.) Just be sure that you do this late in the process because if you add extra pages, you will find that your blank header/footer will remain on its original page even though the page you really wanted it to be on has moved elsewhere in the document.

Creating a header and footer

You laid the groundwork for your headers and footers when you set different right- and left-hand pages under “Page Setup”, now you need to create them. Go to “Header and Footer” under the “View” menu. This brings up a floating menu and allows you to add text to the header and footer text blocks. The menu has some useful tools that you will need to understand. Three buttons at the far right of the menu allow you to maneuver between the header and footer as well as between the right- and left-hand pages. The button that looks like an open book brings up the Page Layout tab from Page Setup in case you need to make any adjustments there.

There are also several buttons that allow you to insert information like the date, time, page number, and number of pages. You may wish to include the date and time in a header for the purpose of identifying when a given draft was done, but you'll want to remove this from the final version. The "number of pages" button is useful if you want to note that this is "page 3 of 100" but unfortunately this is another one of the quirky features of Word, and I would avoid doing this if I were you. Too often this number is not correct when you reopen a document. (For example, the header or footer may appear as "page 3 of 2".)

Figure 9 – Header and footer floating menu



For this book, I created fairly simplistic headers and footers. (Have a look!) For the headers, I have simply centered the book title over a thin rule. To do this, insert your cursor within the header, hit a tab (which brings it to a pre-set centered tab), and type the book title. For the footers, I have inserted a page number at the outside edge²⁶ of the page and a brief copyright line with the year and my name. For the left-hand page, type the word "Page" and then space. Next press the "Insert Page Number" button. (It's the one with the number sign inside.) Then hit two tabs and type whatever name and copyright information you desire.²⁷ For the right-hand page, type the name and copyright information first,

²⁶ Open any book so that you can view two pages side-by-side. Of course, the left-hand page, also called a verso, is on the left, and the right-hand page, also called a recto, is on the right. Readers generally look for the page numbers toward the outside edge of the page (i.e., away from the gutter at the center of the open book). The page number can either be in the header or the footer. Sometimes the page numbers are centered in the header or footer, but more frequently they are to the outside, so you have to place them differently for a right-hand and left-hand page. (If a designer really wants to confuse the reader, he/she puts the page number somewhere outside of these generally accepted areas.)

²⁷ If you are using the "Auto Correct" feature and type an open paren, a lower case "c", and a close paren, it will convert those characters automatically to a copyright symbol.

then tab twice, and then put in the “Page” and insert the automatic page number. I will describe how to set the style for headers and footers below. This will also include a discussion of how to make a rule above or below.

About styles in Word

The Microsoft Word template that you opened (“General”) already has some existing styles. You need to adjust these to reflect the styles that are appropriate for a book. Once you do this, everything to which you apply that style will be formatted in the appropriate way.

Be sure that you are in “Page Layout” mode (under “View”), then insert your cursor near some text. To the upper left side of your screen, you should see three white rectangles (see below). The first contains the name of the style, the second contains the name of the font, and the third contains the size of the font.²⁸ All three boxes have pull-down arrows that allow you to change the settings. Choose the pull-down arrow by the “Style” box at the far left. You should see a pull-down menu of style selections including Heading 1, Heading 2, and Normal, etc. Choose “Normal”.

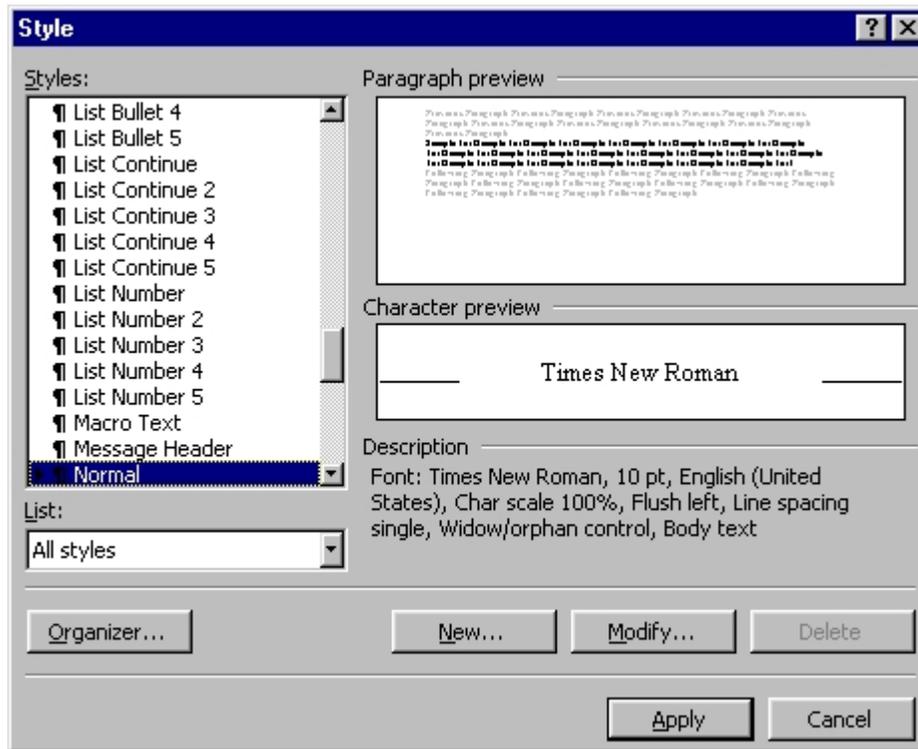
Figure 10 – Style, Font, and Font Size boxes



We will now change the Normal style so that it is suitable as the body text of your book. Under “Format” select “Style”. This brings up a menu that shows you a brief description of the style along with a visual preview. You may also select a new style at this point from a list at the left.

²⁸ If you select a large amount of text, you may notice that one or more of these boxes is blank. For example, the font size will be blank if the text you have selected contains two or more sizes.

Figure 11 – The Style menu



For the moment, let's stick with the Normal style. Choose the "Modify" button. This brings up another menu with a variety of choices. The most important selection is called "Format", which allows you to change settings like Font, Paragraph, Tabs, Border, Language, Frame, and Numbering. You will spend most of your time in the Font and Paragraph areas. However there are a few points worth mentioning here before we move on:

- Style for the following paragraph – A selection in the upper right hand corner allows you to select the style for the following paragraph. In other words, if I am typing a paragraph with the Normal style and then hit "Enter", it will apply the specified style to the following paragraph. In this case, the following paragraph should be Normal, because you generally do want to type multiple text paragraphs in a row, and Normal is the Style we're using for text. With headers, you generally want the following paragraph style to be Normal too, because text follows all headers. This makes it easier for you while you are

writing because the most appropriate styles are applied automatically.

- Add to template – A check box allows you to add the corrections to your template. You do not need to check this for now. Later, we will save the completed template for future use. If you make subsequent changes to styles later on, you may wish to add them to your template.²⁹
- Automatically update – If checked, this feature will automatically make corrections to styles as you update them in your document. You should also leave this unchecked because it has the potential to cause a ripple of drastic changes automatically through your document. For example, if you change the size of some Normal text and the “Automatically update” box is checked, Word will change all the Normal paragraphs to that size.
- Shortcut key – You can create shortcuts for your styles so that you can apply style changes with a keystroke (rather than a click of the mouse). Honestly, setting styles with the mouse is not that hard, so I don’t think that much is gained by this. If you choose to use this, you need to reassign certain keys on your keyboard to be a shortcut key. The most appropriate choices are from the numeric keypad.

The next selection on the Modify Style menu is “Format”. If you press the format button, you get the following choices: Font, Paragraph, Tabs, Border, Language, Frame, and Numbering. We’ll discuss each individually:

- Font – The “Font” selection brings up a menu with three tabs: Font, Character Spacing, and Animation. The Font tab gives you the ability to change the font, its style (italic, bold, bold italic), and its size. You can also change color, add an

²⁹ This is really only important if you intend to do multiple books with the same style.

underline, or apply some special effects. (Don't be tempted to use the underline or the special effects. If you want to add emphasis, you should do so through the judicious use of fonts rather than through these high-tech tricks.) There is also a preview screen that shows you the impact of your selections. It will also report additional information about the font, for example, whether it's a TrueType, scaleable printer font (i.e., a PostScript font), or even whether it's installed on your machine at all. (If you use a template with a style that includes a font that is not installed on your system, Word will substitute "the closest available" font.) One last word of warning: Be careful how you use the "Font Style" setting. In general, it should be set to "Regular" and not to "Bold", "Italic", or "Bold Italic". You should then choose the appropriate font in the "Font" setting. If you want to choose a bold font, then find a bold font, rather than setting the style as "Bold". For example, I have often used an Adobe family of fonts called Garamond. This included both a regular and bold version. When I needed bold, I simply chose the bold version. In some cases, you will find writers who assign the "Bold" setting to an already bold font. This makes the font look bloated and unattractive.

- Paragraph – The "Paragraph" selection gives you control over characteristics like indentation, spacing, and selected line or page breaks. The menu includes two tabs: "Indents and Spacing", and "Line and Page Breaks". Under "Indents and Spacing", you can define the characteristics that determine how the paragraph aligns (left, center, right, and justified) as well as the spacing above and below it. You can set an indent for the entire paragraph, or just for the first line. You can set the line spacing if you want, but generally you should leave it set at single spacing. You can set the outline level, which is important because it allows you to include the style in a table of contents if you desire. There is also a link to the Tabs menu, should you

wish to associate any tab settings with your styles. In addition, a preview screen shows you the impact of your decisions. Under “Line and Page Breaks”, your choices include “Widow/orphan control”, “Keep lines together”, “Keep with next”, “Page break before”, “Suppress line numbers”, and “Don’t hyphenate”. You will see how these choices come in handy as we assign the styles for a typical book. For example, you will use “Keep with next” to assure that a heading is not separated from the text that follows it.

- **Tabs** – This is a small menu that allows you to set tabs for a given style. In general, you will set indents rather than tabs for most book styles, but you may find this feature useful if you use colons within a heading style and you want the position of the following text to fall in a consistent location. For example, with “Chapter 4: Accounting”, an appropriately set tab following the colon would assure that the word “Accounting” falls in a consistent location relative to other chapter headings.
- **Border** – “Border” is a powerful menu that allows you to format the rules, boxes, and fills surrounding a block of text. I recommend that you use only a small piece of its capability, that is, the ability to draw rules above and/or below a heading or text block. To do this, choose the Borders tab and select the Box setting, the solid line style, the color black, and the half point width. At that point you should see a full black box surrounding the text in the preview. Then, by either clicking directly on the side of the box that you want to remove, or by using the buttons to the side, you can set the line to fall above or below the text. The “Options” button allows you to set the distance from the line to the text. This feature comes in handy for page headers and footers, as well as headings within your book. These lines will continue the full length of the text

block.³⁰ The Border menu also gives you the ability to create sophisticated headings that drop white type out of a black background, but you should leave that kind of design work to the professionals unless you have some experience with graphic design.

- Language – This feature allows you to set the language used for spell and grammar checking. This is not generally something that you would change from one style to another in your document, but there are some useful aspects. For example, if you are using Word’s U.S. English dictionary, the spelling and grammar checker will have a hard time with text in foreign languages. You may choose to assign these sections a style that uses the appropriate dictionary. Or, you may choose to mark these “(no proofing)” so that they are ignored by the spell and grammar checker. This can be useful for direct quotes, which may intentionally include misspellings or improper usage. In addition, there is something particularly absurd about applying Word’s spelling and grammar check to the work of famous authors who you may have quoted in your book. However, be very careful with the “no proofing” feature, because you don’t want to accidentally turn off the proofing for other sections of your document. You may then assume (incorrectly) that they have been checked and passed by the spelling and grammar checker.
- Frame – “Frame” allows you to adjust the way that text flows around a graphic box. In general, I think that it is best not to have text flow around a graphic on all sides.
- Numbering – This selection brings up a “Bullets and Numbering” menu with three tabs that allow you to set the style for bulleted or numbered items. If you have very

³⁰ There may be a way to make them continue only for the length of the word, but if there is, I haven’t been able to find it.

sophisticated bulleting or outlining requirements, you may find this useful. In general, I have created a single bullet style and have used that whenever necessary.

Setting styles

The menus described above are ones that you will visit frequently. To show you how to use them, let's create some styles that are appropriate for a typical non-fiction book. If you are writing fiction, you will probably need even fewer styles.

For any of these style changes, start a new line by hitting "Enter" (i.e., a carriage return) and set the style to the style setting that you want to adjust. (Remember that you set the style by selecting the Style box toward the upper left hand corner of your screen.) In the following sections, I will describe how to adjust existing Word styles so that they are suitable for a book.

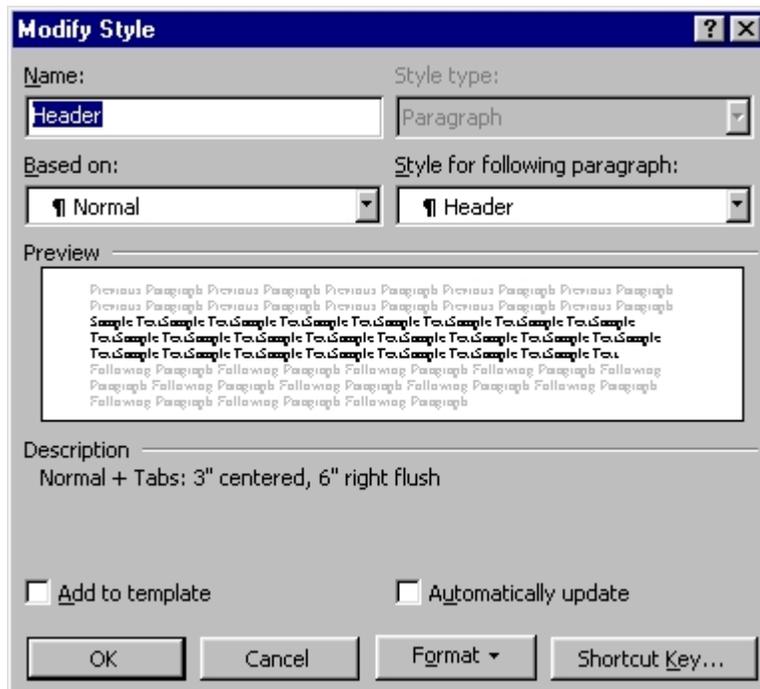
Headers and Footers

Let's start with the style for the headers and footers. To get to the headers and footers, choose "Headers and Footers" under the "View" menu. This should bring you to your first header. You will see that the Style window to the far left contains the style "Header". Now choose "Style" under the "Format" menu. This will bring up the style parameters for "Header". Press the "Modify" button to bring up the "Modify Style" Window. Then press the "Format" button and change the parameters that you wish. For example, you may wish to change the font size or add a rule under the header. Once your changes are complete, press "Okay". You will need to press "Okay" again to leave the "Modify Styles" menu. Then press "Apply" to apply your changes. If you don't like what you see you can always undo the changes.

Once you have accepted the changes to the Header style, you can move on to the Footer and apply changes in the same fashion. In general, the header should be somewhat smaller than the body text so that it does not attract undue attention away from the most

essential part of the book. I used the same font as the chapter heading, but made it smaller (ten points instead of fourteen points). I added a half point rule under the header and above the footer. I used the pre-set tabs to center the title in the header and to set the page number and copyright line in the appropriate places in the footer.

Figure 12 – Modify Style menu



The body text

The text of a book should be easy to read. Therefore you should make it large enough and also select a font that is intended as a text font.³¹ Times New Roman is an example of a TrueType font that is a very legible serif font that is often used for text. Designers tend to avoid Times New Roman because it is overused, but it is a safe choice for body text. In any case, you should select a serif font

³¹ Some fonts are created specifically for headlines and are not easy to read when they are reproduced in small sizes or with many words. Other fonts are intended for special purposes, like script fonts, and are not suitable for long blocks of text.

for your body text and set it no smaller than 12 or 14 points for good legibility.

Start with the Word style called “Normal” and adapt it as you wish. I chose a PostScript font called Goudy and set the size at 16 points. The paragraph is single spaced and set flush left. I added no space before and 6 points after. I set the outline level to “Body text”. I turned on Widow/orphan control, which assures that a single line (either the first or the last) from a paragraph is never stranded at the beginning or the end of a page.³²

I recommend that you either set your body text to flush left (like this book) or justified (where the text is stretched out so that the column edge is straight at both the right and the left). Except for poetry, which might be centered or perhaps flush right, I can’t think of any book that is not well served by the flush left or justified settings. However, justified text may not look good if you set your column too narrow or if there are only a few words in each sentence. With few words in a narrow column, the spaces between the words are often expanded to justify the text. For good readability, set your column width and font size so that a line does not contain more than fifteen or sixteen words.³³

Chapter title, headings, and subheadings

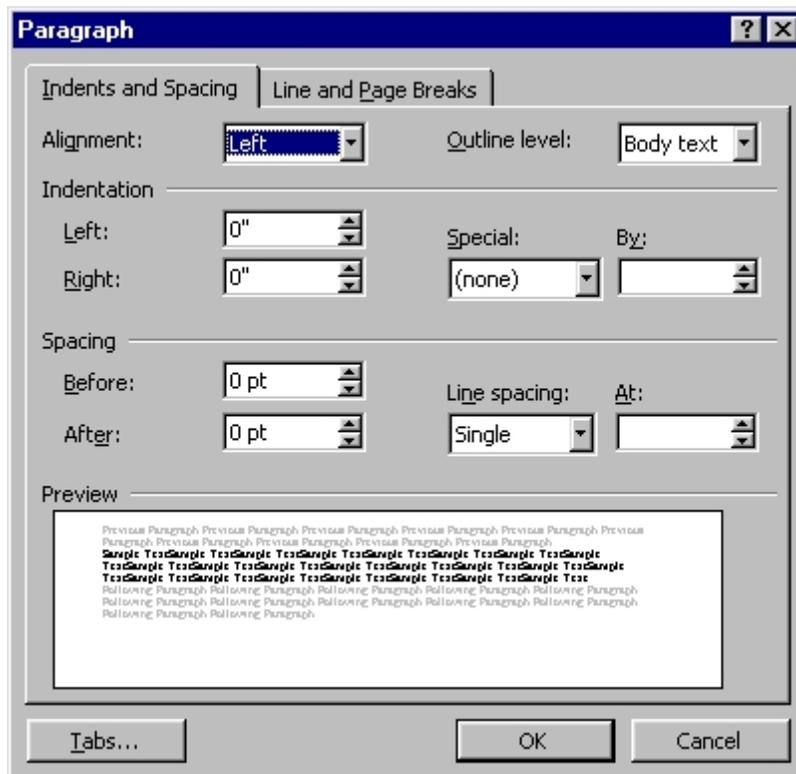
For the chapter title, I chose the style called “Heading 1” and adapted it so that each chapter would start on a new page with a large amount of space above the chapter title. To do this, modify “Heading 1” using the appropriate Format tools to increase the

³² It looks odd if a single line that is part of a paragraph stands by itself. To prevent this, Word pushes the line to the next page or brings a second line to accompany it so that there are never fewer than two lines standing alone.

³³ In the same way that you should limit the number of words in a line, you can also improve readability by limiting the length of paragraphs. There is no automated way to handle this, but as you write you should try to keep paragraphs from becoming excessively long. In general, paragraphs that exceed a dozen or so lines are visually boring. Breaking up long paragraphs into smaller pieces will make your book easier to read.

“Space before” to 100 points. (Here is how you get there: Format to Style to Modify to Format to Paragraph.) This is also where you can check the “Page break before” box. This feature is under the “Line and Page Breaks” tab.

Figure 13 – Paragraph menu



I chose a sans-serif PostScript font called Myriad Roman. I set it to “Bold” under Font Style. (I was able to do this because I have the whole font family and I knew that Word would select the proper font rather than artificially creating a computer-generated bold version.) I set it to 24 points and assigned it as a “Level 1” heading so that it would be at the top level when I created the table of contents.

By this point, you can begin to see the relationship between the body text you selected and the chapter heading. You should choose sizes that complement each other, and yet provide significant contrast for the other elements in your book. Book

designers typically choose a serif font for the text and a bolder sans-serif font for the top-level headings. Look at some of your favorite books to see how the various elements were handled.

Adjusting the headings and subheadings should be a pretty easy task for you now that you are familiar with Word's style features. I will describe how you might choose to format your major chapter headings as well as two levels of sub-headings.

The trick when you have numerous heads and subheads is to build a visual hierarchy that shows the relative importance of the headings. This hierarchy must be constructed between the boldest top level header and the body text. No header can appear less important than the body text. When you chose your chapter title and body text, in effect you were setting the two ends of the spectrum. For this book that meant that I had to make my headings and subheadings smaller or less bold than 24-point Myriad Roman Bold, but stronger than 16-point Goudy.

Table 1 – The styles used in this book

Function	Style name	Font	Size	Style	Indent	Position	Other
Chapter title	Heading 1	Myriad Roman	36 pt.	Bold	None	Centered	120 points before, 20 pt. after
Heading	Heading 2	Myriad Roman	18 pt.	Bold	None	Flush left	12 points before, 3 pt. after, keep with next
Subhead 1	Heading 3	Myriad Roman	18 pt.	Italic	0.2" (left)	Flush left	6 points before (otherwise based on Heading 2)
Subhead 2	Heading 4	Goudy	18 pt.	Roman	0.4" (left)	Flush left	(otherwise based on Heading 3)
Text	Normal	Goudy	16 pt.	Roman	None	Flush left	6 pt. after

The table on the previous page shows how I balanced size, style (bold, italic, and roman), spacing, and indents to build this hierarchy. I changed only two or three key elements from one heading to the next. By the last heading I am not even using a sans-serif font anymore. I have chosen a slightly larger version of the body text font.

You can see from the table below how I balanced size, style (bold, italic, and roman), spacing, and indents to build this hierarchy. I changed only two or three key elements from one heading to the next. By the last heading I am not even using a sans-serif font anymore. I have chosen a slightly larger version of the body text font.

The more heading levels you require, the harder the task becomes for the designer. It's also confusing for the reader, so you should try to limit the number of headings as much as possible.

Once you have had a chance to see how your selections work in practice, you may decide to change fonts, add or subtract space, or fine tune your styles in some other fashion. This is exactly the process that a book designer would use. No one, not even an experienced designer, is able to make design decisions without reviewing the impact of those decisions on appearance, legibility, and readability.

Footnotes, captions, tables, and other elements
Microsoft Word has some tremendous automated features for creating footnotes and captions, as well as for creating tables.

- Footnotes – Creating a footnote is simple. Just place your cursor where you want the reference number or symbol to appear and then select “Footnote” from the “Insert” menu. Word then opens a window where you can type in the footnote. If you choose to have numbers, Word will automatically sequentially number the footnotes and place them at the bottom of the

relevant page. You can double-click on the footnote number if you ever want to edit the footnote text.

- Captions – The “Caption” command also appears under the “Insert” menu. You can use this to sequentially number captions automatically.
- Tables – Making tables in Word takes a little bit of practice, but it is a very useful feature. This is particularly true if you want to insert information from a spreadsheet program like Microsoft Excel. You will want to use this feature for text that is tabular in nature and contains multiple columns. (See Table 1 in this chapter as an example.) If you find yourself typing multiple tabs to get text to align, or, if you are spending too much time trying to adjust tabs on the ruler bar, then you should take the time to learn more about Word’s Table feature.

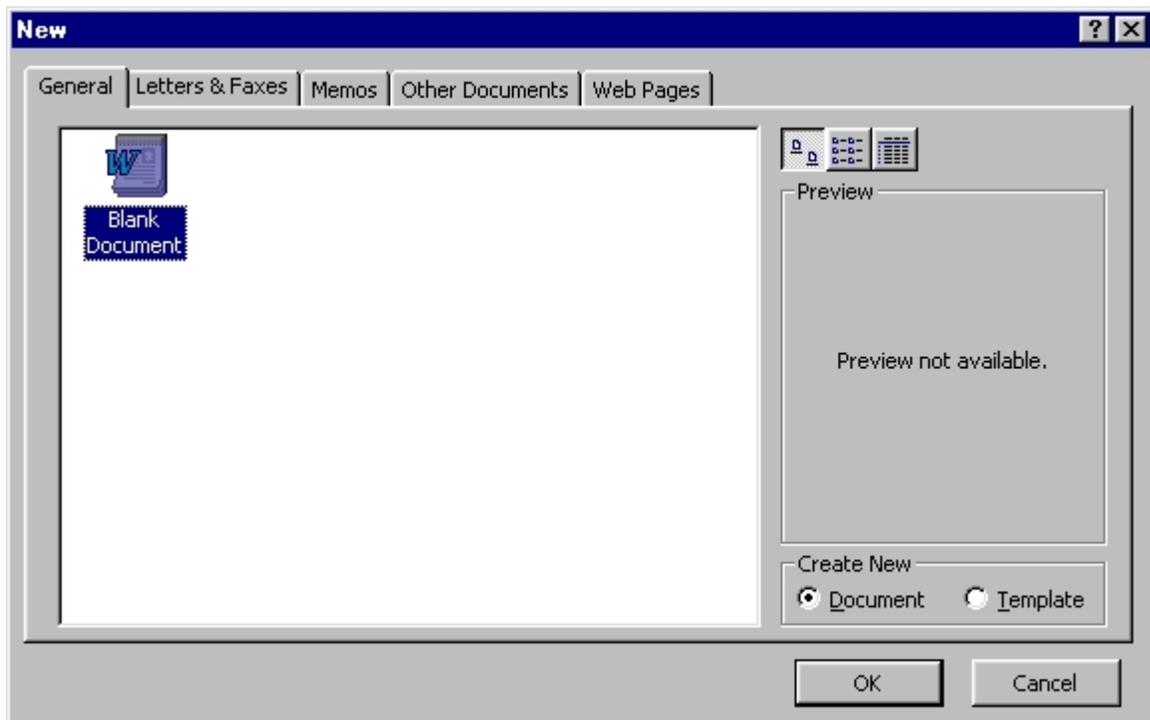
In the case of captions, footnotes, indices, and table of contents entries, there are styles associated with each of these. You may choose to have these based on your “Normal” text style, or you may want to differentiate them through the use of a different font. All of this is made possible by the use of styles in Word. Keep in mind that your table of contents and index may have multiple levels, and therefore multiple styles. These are often distinguished through the use of indentation.

There are a few types of pages that appear in many books, including the title page, copyright page, dedication page, and colophon. You may wish to handle the headings and spacing for these sections somewhat differently from other portions of your book. Since these pages appear only once in a book, you may not feel the need to create a separate style for them. However, it is generally best to do so, because you can then rest assured that you will not change them inadvertently if you adjust the style on which they are based.

Word's Professional Report template

If you would prefer to work from an existing Word template, there is one called “PROFREPO” (i.e., professional report) under “Reports” that will work well as a book format. This template was not installed on my computer, so I had to go back to my program CD and find it and copy it onto my computer in the “Templates” folder in the “Msoffice” folder. If you make a new folder in the “Templates” folder, that name will appear as a tab selection the next time you open a new Word file and select a template. When you open a document with the PROFREPO template, it includes some basic notes on how to use the template.

Figure 14 – The new document Template menu



If you create a document that you would like to use as a template for future documents, then save the document as a “Document Template” in the “Msoffice” folder. (Word identifies template files with the .dot file extension.) Word will then present this as an option the next time you open a new file. I created a “Books” folder for the templates I have created. The files that I use as

templates include examples of the key headings and text styles along with a brief explanation of the use of the template.

Size-dependent elements

Word's templates and styles are very flexible, and allow you to make global adjustments to your book very easily. If you decide later to use a different size for your book, and have used Word's templates and styles, it will be much easier to adjust your design to the new format. However there are a few common book elements that are dependent on size:

- Tables – The “Table” feature in Word allows you to create handsome tables, but the table needs to fit the page. If you change the book's size, the width of the text block, or the size of the type, you will have to re-work your tables.
- Scanned images or clip art – The printed quality of scanned images and clip art depends on the size at which they are reproduced. If you move your book to a larger size and wish to enlarge your images, these elements will have to be adjusted accordingly. If you move to a smaller size, you will probably want to make the resolution appropriate for the chosen size.³⁴

If you change the size of your book, you will have some significant work to do in the areas described above, so it's important to make a size decision and stick with it. However, if your book is text only, without tables, scans, or illustrations, then it is much easier to adjust to changes in size.

Manual page and line breaks

Manual page and line breaks are a handy tool for formatting pages and paragraphs in the way that you desire. When you insert a manual page break, it sends the subsequent text to the next page.

³⁴ The issue of scan resolution is discussed in detail in the “Art Tasks” chapter.

When you insert a manual line break, it creates a new line (but without starting a new paragraph).

To insert a manual page break, choose “Insert” from the main menu and then “Break”. A menu appears giving you a choice of “Page break” or “Column break”. Unless you have a multiple column document, you should choose “Page break”. You also are given the option of inserting some breaks, including “Next page”, “Continuous”, “Even page”, and “Odd page”. I have usually avoided section breaks, because when you create a new section, Word will sometimes restart the page numbering at 1. And though it is possible to adjust the page numbers for each section so that the numbering is continuous, I think it is best to avoid adding unneeded extra sections.

To insert a manual line break, press “Shift+Enter”. You might choose to use a manual line break because it moves the text to the next line without adding any space before or after the paragraph. (Starting a new paragraph by hitting “Enter” could add extra space, depending on the parameters of the style.) When you “Show” all non-printing characters, a manual page break appears at the end of a line as a small arrow.

Figure 15 – Paragraph mark (¶) and manual line break (↵)

In general, it is best to avoid inserting manual line and page breaks into a document until very late in the formatting process because changes elsewhere in the document may render them totally useless. However, once you have completed the bulk of your writing and editing, you may find the need to add page or line breaks to make document work out the way that you want. For example, I have inserted manual (so-called “hard”) page breaks for a couple of reasons:

- To get chapters to start on a right-hand page – As described earlier, it is possible to set a Word style so that it makes each chapter start on a new page. However, I haven’t been able to

figure out an automatic way to create a style so that all chapters start on a right-hand page. Therefore I manually added page breaks late in the process so that all the chapters started on right-hand pages. This ends up inserting blank pages, but I preferred that to having chapters start on left-hand pages. An easy way to check if the chapters are starting on right-hand pages is to look at the table of contents. If the chapter page numbers are all odd, then the chapters are all starting on right-hand pages.³⁵

- To break material at a logical place – In some cases it just made sense to move a paragraph to the following page.
- To fit an illustration in an appropriate place – Large illustrations can be difficult to place if you want them to be close to the text describing them. You may have to insert hard page breaks to accomplish this.

You may need a manual line break when you want to move a single line to the next page or push a word down to the next line. For example, in “The Writing 69th”, the words “B-17” and “B-24” appeared frequently. In many cases, the “B-“ would be left alone at the end of one line with the 17 or 24 beginning the next line. This looked odd so I used a manual line break to move the “B-“ down to the next line.³⁶

I am generally against putting such hard breaks into a document, but I couldn't figure out a way to automate the process in certain cases. Placing hard breaks in a document can cause significant problems if you change formatting (like font size or column width). When that happens, you'll find manual line breaks breaking sentences halfway across the column, or manual page

³⁵ This assumes that your book is duplex. If you are printing only on one side of the paper (i.e., simplex), then all of the pages with text will be right-hand pages.

³⁶ There is a way to do this automatically in Word using so-called “non-breaking hyphens”, but I could not get them to work consistently.

breaks creating nearly blank pages. If this should happen, you can use Word's Find/Replace feature to search for manual breaks. Word's Show/Hide feature will also help you identify these "invisible" non-printing characters like spaces and paragraph marks, but also manual line and page breaks.³⁷

If you find yourself inserting a lot of paragraph marks to move text to the next page, you should use a manual page break instead.

Ways to avoid manual formatting

Any time you see yourself doing a lot manual formatting, stop for a minute and think whether a Style change or the Find/Replace feature could make your task easier. Overall, be sure to avoid the following errors:

- Forgetting to use outline heading levels – Maybe you don't like the outlining feature in Word and therefore choose not to use it while you are writing. That's a bad move. Keep in mind that the outlines are not only useful in writing, but they are also extremely useful to the designer. When you use outlining you are building a sensible framework that will be particularly useful for formatting the book and creating the table of contents. In addition, learning how to use Word's Outline mode will come in handy when you want to understand how documents are formatted for display on the Internet. Web pages use a very similar type of hierarchical structure for displaying information.
- Manually assigning bold, italic or underlining – Don't assign bold, italic, or underlining using the menu buttons. If you manually assign bold, italic or underlining, you aren't taking advantage of the Style feature of Word. It is much better to update the appropriate Word style when you want to change a

³⁷ You can Show or Hide these invisible characters by pressing the Show/Hide button on the menu bar. You can also access this feature under the "Tools" menu by selecting "Options" and the "View" tab. Under "Non-printing characters, select "All".

font. This gives you much greater flexibility to change it automatically later. Now, you might not care about this if you were the author, but since you are taking the roles of author and designer, you should know that the designer will find his/her work much easier if you do this.³⁸

- Correcting spacing by adding spaces instead of setting tabs – When you make a table and use spaces instead of tabs to make the words line up, you are setting yourself up for problems later on. The width of a space changes depending on the font you use and its size. If you change the font (or the size) you will have to adjust everything manually to get it to line up again. If you set tabs, the spacing will be consistent even if the font changes. You can even set tabs as part of a style that can be updated as needed. So definitely use Word's Table feature, or, make appropriate use of tabs instead of spaces.

Word's Format Painter tool

Microsoft Word has a convenient tool for applying formats (and styles) to text blocks. The Format Painter tool appears as a paintbrush icon on the menu bar. To use Format Painter, select the text that has the formatting you want to copy and select the Format Painter icon with your mouse. Then select the text where you want to apply the formatting. You can apply the selected formatting to several locations, by double-clicking Format Painter. Click the button again when you're finished.

³⁸Here an exception to that rule: You might like to create a bullet in which the initial word or words are bold, but the rest of the text is roman. There may be a way within Word of creating a style that automatically recognizes that the words preceding the dash should be bold and those following it are roman, but I haven't been able to figure out how to do it. If you want to do this, you must do it manually.

Figure 16 – The Format Painter tool is the small paintbrush in the middle of the bottom row



When Word goes bad

Microsoft Word is a great tool, but even so, there are going to be times when it does unexpected things. For example, setting styles, creating an index, using Search/Replace, and executing many other normal tasks can all change your document in unintended and potentially destructive ways.

In most cases, Word is just doing what you told it to do. For example, you may make a small change, such as manually adjusting the font size in a heading, and then find that the change has been automatically applied to all of your headings. If this happens to you, you probably checked “Automatically update” in the “Modify styles” menu. This can be a handy tool, but in most cases you don’t want to have this feature turned on.

In other cases, weird things happen that appear to have no explanation. Chances are that some obscure Word feature is causing the problem, but sometimes it will turn out that you have discovered a software bug in Word. For example, I created a document with different left- and right-hand page headers that also had a first page header with an inserted graphic. Whenever I update the index, the first page header disappears! I have to reset the “Layout” tab under “Page Setup” and check the “Different first page” box for “Headers and Footers”. When I do so, the first page header reappears. I couldn’t figure out why this happens, so I just have to remember to check the first page header every time I update the index. When things like this occur, you’ll just have to figure them out the best you can.

Styles are another potential source of difficulty, particularly when you are copying and pasting text from other documents. Text that you copy from another document will carry with it the style name from the previous document. If that style name matches a style name in your document, then the style from your document will usually be applied to it. I say “usually” because sometimes it is and sometimes it isn’t. Frequently, the font will be assigned correctly but the size will not. This means that you need to check the styles of copied text very carefully to be sure that the font, size, and other parameters have been assigned correctly to copied text. In some cases, you will copy text that uses a style that is not one of the ones that you are using. Here again you will need to find any such instances and reassign an appropriate style to this text.

Whatever you do, be sure to save frequently (at least every half hour) and also back up your work on a daily basis. That way if something goes terribly wrong with your file and you can’t figure out the problem, then at least you will only have lost a limited amount of work.