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Step-by-Step Part 4: Design

In [Part 3](step-by-step-3.docx) you made sure your book was well-tagged (one of the most important parts of working with Hederis), and how to edit your book text. Now it’s time to design!

1. **Set up your book design.** You can create completely unique designs for every book in Hederis, or you can use our built-in design template, or designs from your other projects in Hederis.

There are a few ways to start designing in Hederis. If you just want to dive in with a clean slate, you can simply click the “Design” tab in the top navigation menu, or choose any chapter from the dropdown menu above your dashboard steps. Both will take you to the Design preview. Once you get there, press “Save Text” to initialize your design, and then dive in.

If you want to [clone a design template](design-templates.docx) from one of your other projects, on your Hederis project dashboard, go to “Design Your Book” and choose “Clone a Template From…” Then choose “From Another Project”, and choose the template that you want to clone. This will create a copy of that template that you can then customize as needed.

If you want to use one of the Hederis pre-designed templates, follow the steps above except choose “From Public Templates” in the second to last step.

All design templates are fully customizable for every book.

Tip

You can create multiple design templates for the same book. For example, you could have separate design templates for your hardcover, ebook, and paperback editions, all built on the same book text. [Learn more here.](pdf-epub-templates.docx)

1. **Open the Design Preview.** There are three ways to open the Design Preview, which is where all the design tools live: Click the Design tab in the menu near the top of the screen; jump straight to a specific section from the dropdown menu on your Project Dashboard; or click the Edit & Design button in the “Design Your Book” area of the Project Dashboard.
2. **Set your book trim size and general font settings.** In the Design Preview, choose “General Design Settings” from the first dropdown menu in the left sidebar. This is where you can set your book trim size, as well as some initial settings for the body font and font size (you can also specify font settings for individual types of paragraphs, but it’ll make your life easier to set some global font settings here first). The font settings you choose here will also determine how large to make [the baseline grid](baseline-grid.docx)—you should choose the font and font size that you want to use for the majority of your body text paragraphs. Press “Reflow Pages” when you’re done to see your changes take effect. [Learn more about the general design settings here.](typeset-general-design.docx)
3. **Set up your “Page Templates.**” If you’ve worked with InDesign, you might know these as “master pages.” This is where you set up your running headers and footers, add page numbers to your pages, configure the inside and outside margins, and more. [You can learn all about it here](typeset-master-pages.docx).
4. **Design your paragraphs and text.** When it comes to [designing your book text](typeset-text-design.docx), you have a lot of options! You can set text basics like fonts, italics, font weight, color, alignment, indent, space above/below/around, underline, etc.; and you can go even further to add background images, borders, a fixed height or width, drop caps, and OpenType settings. To access the design tools, simply click on a paragraph in the Design Preview, and all the options for that paragraph will appear in the sidebar to the left. Here are demos showing you how to design a few common text elements:

* **Chapter titles.** Set you chapter titles apart from the rest of the text, and even add a background image if you like. Watch the demo: *[coming soon]*
* **Body text paragraphs.** Set your design spec once, and see them apply to every body text paragraph in your book. Use the baseline grid to make sure you get balanced pages. Watch the demo: *[coming soon]*
* **Ornamental spaces.** Add an image to your ornamental space, to add some visual flare as your readers move through the text. Watch the demo: *[coming soon]*
* **Extract boxes.** You can design your wrappers as well, to add some formatting to all the text inside those wrappers. Watch the demo: *[coming soon]*

Learning more about the following options can help you streamline your design process:

* **Use the baseline grid.** The baseline grid is a tool that show your how your text lines up on each page, so that you can create what the industry calls “balanced pages”—[learn more here](baseline-grid.docx).
* **Add your own fonts and share them with your collaborators.** You can upload custom fonts, and configure them to be available to different folks depending on your license. [Learn more here](custom-font.docx).
* **Learn how to limit your design to subsets of your paragraph styles.** In Hederis, you can choose to limit your design to a subset of paragraphs—for example, remove the indent from the first body paragraph in every chapter—without needing to add extra styles. [Learn how here](selectors.docx).
* **Remove or adjust overrides.** As you start using the “Limit these changes” menu (see the previous paragraph), it can get tricky to know exactly what design are applied to each paragraph. [Learn some tips for how to spot and remove those kinds of overrides here](design-settings-and-inheritance.docx).

Next up: [Build](step-by-step-5.docx) (a.k.a export) your PDF and EPUB files…