Hederis:Convert Documentation

Overview

Hederis:Convert is based on the concept of the “single-source workflow”. The fundamental principle of this workflow is that your final book files (EPUB, print PDF, HTML, etc.) are all controlled by a single file where you make all changes and edits; you then transform that file into all the output formats that you need, and all of those output files are 100% up-to-date.

In the Hederis:Convert workflow, this single source of truth is your Microsoft Word manuscript. This manuscript contains your up-to-date book text, as well as any instructions for the creation of your final output files. These instructions are given in the form of Word Styles, including the semantic tagging of your manuscript text. See “[Semantic Tagging](#SemanticTagging)” for more on this.

workflow.png

A simple workflow example

Book production is a skilled craft, and requires fine-tuning from experts who understand the book’s text. Hederis:Convert reduces the time it takes to get laid out files into your review process, so that you can focus on creating a perfect single-source of truth (your Word manuscript). Don’t expect the results to be perfect after the first conversion - Hederis:Convert is a tool to help you in the book production process, and not a replacement for human experts.

A sample workflow might look like the diagram above:

1. You upload your raw Word manuscript.
2. In the background, Hederis:Convert processes this manuscript, applies the necessary tagging, and creates initial PDF, EPUB, HTML files, along with a new Word manuscript that contains the results of this analysis.
3. You download this new Word file, which becomes your new working manuscript. (If you don’t use this new Word file as your working file, then you’ll have to redo a lot of work throughout this process.)
4. Your team reviews the new Word file, checking to make sure all paragraphs use the correct styles (see “[Fine-tine Word Styles](#FinetuneWord)”), boxes are correctly wrapped (see “[Add a Wrapper](#AddAWrapper)”), and chapter breaks are in the right places (see “[Add a Section](#AddASection)”).

You also review the PDF and EPUB file to see if anything needs to be tweaked in the Word file to create a cleaner output (see “[Design](#Design)” for more on this).

Note

It’s generally best to do a thorough review of the Word file first to ensure that all the styles, wrappers, and section breaks are correct, and then re-convert the Word file before commencing PDF and EPUB review.

1. Make all required changes to your source Word file (which will be the most recent file created by Hederis).
2. Re-upload your latest-and-greatest Word file for conversion, and start a new review process to make sure your changes were correctly incorporated and to see if any new changes need to be made.

Images

Add an image

Hederis:Convert supports images in your book text. To include an image:

1. Insert a new, blank paragraph in the location that the image should appear.
2. Apply the style “HED Image holder” to your new paragraph.
3. In the paragraph, type the file name of the image, with no other text. It should look like this:

image-1.png

Once you upload the image file to Hederis:Convert (see “[Upload cover and image files](#UploadACover)”), the app will know to place that image file in the location you specified by inserting your image holder paragraph.

Note: If your image has a caption, source credit, or other extra content, there are a few extra steps. See “[Images with captions, sources, or other extra content](#ImagesWithCap)” for more.

Images with captions, sources, or other extra content

If your image has a caption, source credit, or other extra content that goes along with it, it needs to be wrapped in a Figure wrapper (see “[Add a Wrapper](#AddAWrapper)” to learn more). This will ensure that the caption, source, etc. are kept together with the image that they go with. Here’s how to do it:

1. Insert a new paragraph before the first item in your image content (this may be your image holder paragraph, caption, source paragraph, or something else).
2. In the Styles list, find the “HEDBOX Figure start” paragraph, and click to apply it to your new paragraph.

Note

Both your “start” and “end” paragraphs should not contain any text.

1. Insert another new paragraph after the last item in your image content.
2. In the Styles list, find the “HEDBOX Figure end” paragraph, and click to apply it to your new paragraph. Your Word manuscript should look like this:

image-2.png

Upload a cover file

Hederis:Convert will automatically include your book cover in the generated EPUB file, and will include any image files that are in your book text. To include cover and images files, upload them *before* you upload your Word manuscript, as indicated on the Hederis:Convert user interface.

To designate an image as the cover image, simply click on it to select it.

Include full-page images in the PDF

By default, all images in the PDF will be sized down to fit within your specified margin and page dimensions (see “[Adjust PDF trim size and margins](#AdjustTrim)”). However, you may designate an image to be “full bleed”, which means that it will take up the entire page and extend into the bleed area beyond the page, creating a graphic that is flush with the edge of the book in the final product. To do so, you’ll need to use a process instruction (see “[Add special design instructions](#AddPIs)”).

1. In your Word manuscript, find the “HED Image holder” paragraph that contains your image filename.
2. Insert a new paragraph below your image holder paragraph, and apply the “HED Processing instruction” style to it.
3. Type the following text inside your new HED Processing instruction paragraph: IMAGE-SIZE=fullbleed

Your Word manuscript should look like this:

fullbleed-1.png

Grayscale images in the PDF

You can choose to convert all images to grayscale for your PDF, by selecting “Grayscale Images” in the “Configure Export Settings” menu item on your project dashboard.

Manuscripts and Book Text

Upload a Manuscript

To upload a Word manuscript to Hederis:Convert, open the “Upload DOCX” menu item from your Project Dashboard, and click the “Upload a Docx” button or drag a .docx file from your computer file system onto the browser window.

Tip

Insert a page break before every section in your book (see “[Paragraphs, Wrappers, and Sections](#ParaWrapSect)”) to improve the Word import results.

You can choose to have Hederis:Convert delete empty paragraphs when it processes your file - check the “Strip empty paragraphs” to select this option.

Semantic Tagging

Semantic tagging is an extra layer of metadata about your book text. It consists of information about what kind of element each piece of text is: chapter title, body text, extract, and so on. This information is crucial both for knowing how to apply design elements to your text (e.g., adding a border around all extracts, making chapter titles larger, etc.), and for knowing how to parse your book text into the various output formats you need. For example, EPUB files are required to create a table of contents that points to all the chapters in your book, and correctly identifying all the chapter titles in your manuscript helps us to know what text to include in that table of contents.

When you upload a file to Hederis:Convert, we automatically make some guesses about the different parts of your manuscript, but you are the person who knows your content best. It’s a good idea to review our guesses, and adjust them as needed so that your manuscript is correctly tagged. See “[Fine-tune Word Styles](#FinetuneWord)” for details on how this works.

Paragraphs, Wrappers, and Sections

There are three categories of tags that we use in your Word manuscript: paragraphs, wrappers, and sections. Paragraphs are the types of content that you’re probably most familiar with: chapter titles, plain text paragraphs, quotes paragraphs, list items, and so on all fall into this category.

Wrappers are a way to group certain paragraphs together that should be set aside from the main flow of text in some way. For example, if you have multiple paragraphs in an extract, those would wrapped accordingly. Some other examples are poems, letters, epigraphs, and lists. See “[Add a Wrapper](#AddAWrapper)” for more on this.

Sections are the main chunks of your manuscript - you probably use words like chapters, parts, appendixes, prefaces, etc., to describe the sections in your book. At Hederis, we have special styles to mark your section breaks - see “[Add a Section](#AddASection)” to learn more.

Fine-tune Word Styles

When you upload a Word manuscript to Hederis:Convert, we automatically make some guesses about the parts of your document, but these will undoubtedly need to be adjusted and fleshed out. Hederis returns a new Word manuscript to you, that contains all of our tagging and conversion instructions - **you should be sure to download and use this new Word file going forward, or you’ll have to do this process all over again.**

Hederis uses a specific set of Word styles, that all start with the prefix “HED”. When you download and open your new Word file, you’ll see that all the paragraphs in your document have been tagged with one of these styles. Chances are, there will be at least a few paragraphs that you want to re-classify with different styles. ([See the appendix](#ListofStyles) for a full list of Hederis styles and notes about how to use them.) Here’s how to work with styles in your Word manuscript:

To see at a glance which styles your paragraphs are using, open your manuscript in Draft View:

stylesidebar1-callouts-01.png

If you don’t see the sidebar that lists your paragraph style names, open **Word > Preferences > View** (Mac), or **File > Options > Advanced** and scroll down to the **Display** section (PC), and enter a value in the “Style area width” box (2 inches is usually a safe size). Here are some step-by-step instruction on how to do this: <https://www.howtogeek.com/276836/how-to-see-all-the-paragraph-styles-used-in-your-word-document/>

stylesidebar4.png

Tip

You can also resize the style sidebar by clicking and holding your mouse button on the right border of the sidebar, and dragging to the left or right.

Now that you can see which styles are being used for all your paragraphs, scroll through the Word file to ensure that all paragraphs are correctly styled.

If you see a paragraph that needs to be re-styled, click on the paragraph, and then open the Styles pane by clicking the small button in the Home tab of your ribbon.

stylespane1-01.png

Scroll through the list of styles to find the correct style and click to apply it to your selected paragraph.

Note

Word often tries to “help” you by only showing you a selection of styles in the Styles pane. If you can’t find the style you’re looking for, this may be why. To show all available styles, follow this instructions here: <https://confluence.macmillan.com/display/PBL/View+Styles+Manually#ViewStylesManually-TheStylesPaneandStyleInspector>

Add a Wrapper

Certain groups of paragraphs need to be enclosed in a wrapper, which will add special design and formatting instructions for the paragraphs inside it. Examples of types of wrappers are: extracts, letters, code blocks, poems, complex lists, complex figures, and more. Wrapper styles all start with the prefix “HED BOX”, and always come in a pair: one style to mark the beginning of the wrapper, and one style to mark the end.

Many paragraph styles can be re-used both in the main flow of text and inside wrappers, and will appear differently depending on whether or not they’re in a wrapper. For example, the “HED Plain text paragraph” is used as the basic paragraph type for content in the main text, as well as for paragraphs inside boxes and sidebars, like this:

wrapper1.png

To add a wrapper:

1. Insert new paragraphs both before the first paragraph in your group of paragraphs, and after the last paragraph in the group.
2. Style the first new paragraph with the “start” style for the wrapper that you want to use. For example, if you’re inserting a letter, you should style this paragraph with the “HED BOX Letter start” style.
3. Style the second new paragraph with the “end” style for the wrapper that you want to use. For example, if you’re inserting a letter, you should style this paragraph with the “HED BOX Letter end” style.

letter1.png

Note

Wrappers can be nested inside other wrappers. For example, an epigraph might contain a block of poetry; and a bulleted list might contain a nested numbered list. Both of these would be accomplished using wrappers. Here’s an example of nested lists:

list1.png

Add a Section

Hederis:Convert will automatically interpret any page break in your document as the start of a new section. However, it’s likely that you’ll need to re-classify some sections, or add new sections.

To add a new section break:

1. Insert a blank paragraph in the location where you want the new section to start.
2. Click inside your new blank paragraph.
3. Open the Styles pane (see “[Fine-tune Word Styles](#FinetuneWord)”), find the name of the correct section break type for this new section, and click to apply it to your section break paragraph.
4. To re-classify a section:
5. Click anywhere inside the section break paragraph that you want to re-classify.
6. Open the Styles pane (see “[Fine-tune Word Styles](#FinetuneWord)”), find the name of the correct section break type, and click to apply it to your section break paragraph.

Set up a Table of Contents

For Hederis, a Table of Contents should use a combination of Bookmarks and hyperlinks. Bookmarks and hyperlinks are built-in features of Word, and allow you to create internal links in your document. The destination of the link should have a Bookmark, and the link itself should be inserted as a hyperlink. Here’s how:

Create Your Table of Contents

The first step is to create the text that will be included in your Table of Contents.

You do this the same way you’d insert any paragraph, simply place your cursor in the document, and start typing. For Hederis, there are some rules about how your Table of Contents should be styled:

TOC0-1.png

It should be wrapped in a Num List wrapper (see the section on Wrappers).

Each TOC item should be styled with one of the 4 following styles:

* HED TOC entry - frontmatter
* HED TOC entry - part
* HED TOC entry - chapter
* HED TOC entry - backmatter

Insert Bookmarks

You need to insert a Bookmark before every heading that you want to include in your Table of Contents. The general steps will be as follows:

1. Scroll through your document to find the heading that you want to link to.
2. Click before the first character of the heading text.

TOC1-1.png

1. Go to Insert > Bookmark…

TOC1-2.png

1. In the “Bookmark name” field, type a name for your Bookmark, and then click “Add”.

You won’t see anything happen, but when you go to insert your hyperlink, you’ll see the new Bookmark in your list of Bookmarks.

TOC1-3.png

Insert Hyperlinks

No go back to the Table of Contents text that you added in the first step. To create the TOC links, do the following:

1. Select the whole text of the TOC item.
2. Go to Insert > Hyperlink…

hyperlink1.png

1. Next to the “Anchor” box, click Locate.

hyperlink2.png

1. Expand the “Bookmarks” header and choose the Bookmark that you want to link to.

hyperlink4.png

1. Click OK, and then click OK again in the main Hyperlinks dialog box.

Your TOC item will appear blue and underlined, which means that your link was successfully inserted.

Include content only in the PDF or EPUB

You can designate part of the content in your to appear only in the PDF or EPUB output by using a processing instruction (see “[Add special design instructions](#AddPIs)”). The example below displays a different ISBN on the copyright page, depending on whether the output format is PDF or EPUB.

customcontent1.png

1. In your Word manuscript, find the paragraph, section, or wrapper that you want to hide in certain output formats.
2. If it’s a paragraph, insert a new paragraph below it. If it’s a section, insert a new paragraph just below the section break paragraph (see “[Add a Section](#AddASection)”). If it’s a wrapper, insert a new paragraph after either the start or end of the wrapper (see “[Add a Wrapper](#AddAWrapper)”). Here’s an example of a processing instruction applied to a whole section:

customcontent2.png

1. Style your new paragraph with the “HED Processing instruction” style (see Fine-tune Word Styles”).
2. Type the following text inside your new HED Processing instruction paragraph: FORMAT=, and then type one of the following keywords, depending on which output format you want the element to appear in: ebook, print.

Design

Adjust PDF trim size and margins

Go to your Project Dashboard and expand the option labeled “Configure Export Settings”.

To adjust your PDF trim size, enter your chosen values in the height and width boxes, select a unit of measurement from the dropdown options. Your selection is auto-saved.

To adjust PDF margin widths, enter values for each of the margins that you’d like to adjust.

Add printer marks

Go to your Project Dashboard and expand the option labeled “Configure Export Settings”. Click the box marked “Trim Marks”. To turn off printer marks, uncheck this box.

View baseline grid

If you’d like to see how your text aligns to the built-in baseline grid, to ensure that pages in your PDF are correctly balanced, you can turn it on by selecting “Show gridlines” in the “Configure Export Settings” option.

Add special design instructions

You can tweak the design of specific paragraphs, sections, or wrappers by adding special instructions to your Word file.

After you’ve converted your manuscript for the first time, you’ll receive a new Word file with all of the special Hederis styles applied. (See “[Fine-tune Word Styles](#FinetuneWord)” for more information on working with Word styles.) We have an extra style just for adding design and layout instructions: “HED Processing instruction”.

PI1.png

To add your design instructions:

1. Find the paragraph that you want to customize the design of, and insert a new paragraph after it (place your cursor at the end of the paragraph, and then press enter).
2. In your new paragraph, type the code for the type of instruction you’re adding, and then type an equals sign, and then type the code for the special design instruction. See the end of this section for a list of all of these codes. For example, if you want a paragraph to be centered instead of left-aligned, your text would look like this:

PI2.png

1. Finally, make sure your cursor is still in the new paragraph, and then open the Styles pane. Scroll to find the HED Processing instruction style name and click on it; this will apply it to your new paragraph.

You can apply a processing instruction to an entire section by inserting the processing instruction paragraph after the appropriate section start paragraph (see “[Add a Section](#AddASection)”), and to a box by inserting the processing instruction paragraph after either the wrapper start or end paragraph (see “[Add a Wrapper](#AddAWrapper)”).

Tip

If you don’t see the HED Processing instruction style in the Styles pane, try adjusting your Styles view options (see “[Fine-tune Word Styles](#FinetuneWord)”).

Tip

You can make sure the style was applied by viewing your document in Draft View and expanding the Style area (see “[Fine-tune Word Styles](#FinetuneWord)”).

Tip

You can apply multiple types of processing instructions to a single paragraph by separating each option with a “+”, like this:

PI3.png

Processing Instruction codes:

|  |  |  |
| --- | --- | --- |
| Options | Possible values | Notes |
| image-size | fullbleed | In the print file, this will create a fullbleed image that will fill an entire page and bleed area. See Images for more info. |
| style | Any valid CSS property/value combination [LINK to CSS properties] |  |
| format | ebook, print | Display a certain paragraph, wrapper, or section only in the ebook or PDF file. Default value is “both”. |

Have a suggestion for other types of instructions you might include? Email us! help@hederis.com

Adjust line-breaks and page-breaks (PDF-only)

You will undoubtedly find that there are page breaks or line breaks in your PDF that are less than optimal. You can attempt to adjust these by adjusting the character spacing in the paragraphs around the bad break, using the Hederis:Convert loosen and tighten character styles:

1. Select the span of text that you want to loosen or tighten. This can be just a few words in a paragraph, or the whole text of a paragraph (or even multiple paragraphs).
2. In the Styles pane (see “[Fine-tune Word Styles](#FinetuneWord)”), choose either “HED SPAN Loosen spacing” or “HED SPAN Tighten spacing”, depending on which you want to do.

The next time you upload your Word file to create a new PDF, you should see that the text is either looser or more compact.

Here’s an example of a single line of text styled with “HED SPAN Loosen spacing”, and an entire paragraph styled with “HED SPAN Tighten spacing”.

loosetight1.png

Note

This can be a delicate process, involving several attempts before you find a fix that works. Consider upgrading to our advanced tool for faster, more visual control over your final layout.

Upload a custom design template

To upload your own CSS design template, email us at help@hederis.com.

Want us to translate an InDesign template into CSS? Learn more.

PDF preflight and prepress

PDF preflight is not currently built into Hederis:Convert. You should implement a preflight process as recommended by your printer, but we’re happy to help you create a process around preflighting and finalizing your PDFs for printing.

EPUB Validation

We recommend that you run the epubcheck validation tool on your files before distribution, to ensure that there are no errors. We’ll be integrating epubcheck into our toolchain very soon, but we don’t want anything to slip by you in the meantime! If there are any validation errors, let us know and we can help you troubleshoot solutions: help@hederis.com

Appendix

List of Hederis Word Styles

Paragraphs

HED Address

An address, for example in a letter, on a copyright page, etc.

HED Attribution

The attribution to a quote.

HED Attribution (contd)

Continuation paragraphs for a quote attribution. An attribution can have multiple continuation paragraphs.

HED Author name

The name of an author. This could appear in a variety of places: on the main titlepage, following a preface title or chapter title, etc.

HED Box type

Some books include multiple types of boxes and sidebars, that appear multiple times within a book. For example, a book might have a type of box called “Quick Tips”, that contains different tips that correspond to the current book topic. This style would be used to tag that Type heading, and is different from the main box heading.

boxtype.png

HED Caption

A caption, for example to accompany an image or to follow a table.

HED Chap/Sect/Wrapper number

HED Chapter/Section title

Titles of main book sections, like chapters, prefaces, appendixes, parts, and so on.

HED Closing

HED Code paragraph

HED Contributor

HED Dateline

HED Definition definition

HED Definition definition (contd)

HED Definition term

HED Dialogue paragraph

HED Endnote paragraph

HED Footnote paragraph

HED Generic heading

HED Generic subheading

HED Image holder

HED Image source

HED Imprint name

HED Line space

HED List item (contd)

HED List item - Bulleted

HED List item - Numbered

HED Location

HED Mark for Deletion

HED Ornamental space

HED Plain text paragraph

HED Plain text paragraph (contd)

HED Postscript

HED Processing instruction

HED Publisher name

HED Quote paragraph

HED Salutation

HED Signature

HED Speaker name

HED Subtitle

Subtitles for any type of section or wrapper. For example, could be used both for a chapter subtitle, and for a subtitle in a sidebar.

HED TOC entry - backmatter

HED TOC entry - chapter

HED TOC entry - frontmatter

HED TOC entry - part

HED Verse paragraph

A single line of verse.

HED Wrapper title

Titles of wrappers and sub-sections. For example, for a sidebar title, extract title, sub-section title, etc.

HED separator

Inline Styles

HED SPAN Loosen spacing

HED SPAN Tighten spacing

Wrappers

HED BOX Box start, HED BOX Box end

HED BOX Bullet List start, HED BOX Bullet List end

HED BOX Code Block start, HED BOX Code Block end

HED BOX Definition List start, HED BOX Definition List end

HED BOX Endnote start, HED BOX Endnote end

HED BOX Epigraph start, HED BOX Epigraph end

HED BOX Extract start, HED BOX Extract end

HED BOX Figure start, HED BOX Figure end

HED BOX Footnote start, HED BOX Footnote end

HED BOX Letter start, HED BOX Letter end

HED BOX Note start, HED BOX Note end

HED BOX Num List start, HED BOX Num List end

HED BOX Poetry start, HED BOX Poetry end

HED BOX Sidebar start, HED BOX Sidebar end

HED BOX Simple List start, HED BOX Simple List end

HED BOX Sub-section start, HED BOX Sub-section end

HED BOX Table start, HED BOX Table end

Sections

HED SECT About the Author

HED SECT Acknowledgments

HED SECT Afterword

HED SECT Appendix

HED SECT Bibliography

HED SECT Chapter

HED SECT Colophon

HED SECT Conclusion

HED SECT Copyright Page

HED SECT Dedication

HED SECT Endnotes

HED SECT Epigraph

HED SECT Foreword

HED SECT Glossary

HED SECT Halftitle Page

HED SECT Index

HED SECT Interlude

HED SECT Introduction

HED SECT Part

HED SECT Preface

HED SECT TOC

HED SECT Titlepage