ATTRS=id: documentation-home

Hederis Documentation

Hederis is a professional book publishing tool for creating beautiful, high-quality books. You provide a single Microsoft Word file containing your full book text along with any images that you use in the book (and a cover file if you’ve got one), and Hederis will process it automatically into a laid-out PDF, and a fully-accessible and standards-conformant EPUB file. You’ll also get an updated Microsoft Word file and an HTML version of your book. You can reuse a single design template for all of your books, or customize the design of every book you publish through Hederis, and adjust the line breaks and page breaks on any page as needed.

In the navigation menu, you’ll see a list of all the topics in this documentation, which should also give you a sense of all the things you can do with Hederis.

**Here are some useful links to get you started:**

The first thing you want to do is [upload a manuscript](#UploadAMS).

**After you’ve uploaded a manuscript for the first time:**

[Make sure you understand the difference between paragraphs, wrappers, and sections](#ParaWrapSect)

[Adjust the Word Styles and tagging in your updated Word file](#FinetuneWord)

[Add any images that you want to use in the book](#AddanImage)

**And of course, you’ll want to design your book:**

Import a design from the built-in templates or from another book

Customize the design of your text

Set up your running headers and footers

Lock your line breaks and page breaks so they can be reviewed

**You’ll need to take a few extra steps to prepare your files for distribution:**

[PDF preflight](#PDFPreflight)

[EPUB validation](#ValidateEPUB)

And finally, [here’s a sample workflow that you could follow as you use Hederis for your book production](#SampleWorkflow), but we’re always happy to meet with your team to help put together a workflow that works for you – email us at [info@hederis.com](mailto:info@hederis.com).

ATTRS=id : quick-start; data-tags: convert;

Quick Start

<iframe width="560" height="315" src="https://www.youtube.com/embed/vyuVLK4JIkg" frameborder="0" allow="accelerometer; autoplay; encrypted-media; gyroscope; picture-in-picture" allowfullscreen></iframe>

HTML=true

Hederis:Convert is a professional book publishing tool for quickly creating beautiful, high-quality books. You provide a single Microsoft Word file containing your full book text along with any images that you use in the book (and a cover file if you’ve got one), and Hederis:Convert will process it automatically into a laid-out, print-ready PDF, and a fully-accessible and standards-conformant EPUB file. You’ll also get an updated Microsoft Word file and an HTML version of your book.

In the navigation menu, you’ll see a list of all the topics in this documentation, which should also give you a sense of all the things you can do with Hederis:Convert.

**Here are some useful links to get you started:**

The first thing you want to do is [upload a manuscript](#UploadAMS).

**After you’ve uploaded a manuscript for the first time:**

[Make sure you understand the difference between paragraphs, wrappers, and sections](#ParaWrapSect)

[Adjust the Word Styles and tagging in your updated Word file](#FinetuneWord)

[Add any images that you want to use in the book](#AddanImage)

**You can also customize the design and make it your own:**

[Customize the design of specific paragraphs](#StylePI)

[Customize the design of entire groups of paragraphs](#GlobalStylePI)

[Create a custom design template](#UploadCustomTemplate)

**You’ll need to take a few extra steps to prepare your files for distribution:**

[PDF preflight](#PDFPreflight)

[EPUB validation](#ValidateEPUB)

And finally, [here’s a quick primer on how to create a publishing workflow using Hederis:Convert](#Overview), but we’re always happy to meet with your team to help put together a workflow that works for you – email us at [info@hederis.com](mailto:info@hederis.com).

ATTRS=id: guided-demo; data-tags: typeset;

Guided Demo

Welcome to the Hederis design demo! This guide will get you up-and-running with our professional book design tools. (Don’t want to dive in? Check out [the video here!](https://youtu.be/KjJA1HvvEhw))

We put together some sample files to help you get started—[you can download them here](https://www.dropbox.com/s/0t99hotj0svng8h/hederis-demo-files.zip?dl=0). Imagine you’re a designer, and you’re receiving clean, coded files from your production editorial team. (For non-publishing folks, “clean and coded” means that the text has been copyedited, cleaned up, and all the paragraphs have been labeled as titles, plain text, quotes, and so on.)\*

\*Our app actually helps with the labeling process too, via machine learning. [You can watch a demo of that here.](https://www.youtube.com/embed/vyuVLK4JIkg)

1. Go to [app.hederis.com](http://app.hederis.com/) and create an account.

If you use a Google account, creating a Hederis account is as simple as signing in with Google, but you also have the option of filling out a sign-up form using any email address, and choosing your own password. Since Typeset is still in beta, we don’t ask for a credit card and there are no extra steps required to sign up aside from confirming your email address.

1. Create a new Typeset project.

After you sign in, the first thing you should see is your list of projects, which is probably empty. Press the “Create a New Typeset Project” button at the bottom of the screen to create a new project. (You can also create a new Convert project, which is our pure automation product—you can read about it [here.](https://www.hederis.com/products.html))

createprojectbutton.png

A form will pop up, prompting you to enter a title, author name, and ISBNs. Type anything you like here! If you don’t have an ISBN, you can just type “000000” in those fields.

Click “Create New Project,” and wait to be taken to your new Project Dashboard.

createnewproject.png

1. Upload the cover.

After you create your new project, you’ll immediately be taken to your Project Dashboard, where you can manage your book assets (like cover images and Word documents) and set some basic export options that might change frequently.\*

\*If you get an error saying you don’t have access to your project, try hitting the refresh button on your browser and then try again. #betaproblems :D

Let’s upload a cover now. On the dashboard, click to open up “Step 1: Upload a Cover.”

uploadacover.png

Now, in your downloaded folder of sample files, find the file called “COVER.png,” and drag it onto the browser window. The window should turn gray and the text “Drop File Anywhere” should appear. Go ahead and drop it! You should see your cover show up in the big box at the top left. Now close the “Step 1” menu, and we’ll move on.

1. Upload the book text.

Uploading book text works pretty similarly to uploading a cover. Open up “Step 3: Upload DOCX,” drag your Word document onto the browser window, and when the window turns gray, release your mouse to drop the file.

Hederis kicks into action, analyzing your book text, doing its best to figure out where the chapter breaks are, where the chapter titles are, and so on, and then converting it to HTML.

When it’s done converting, you’ll see a little message pop up at the top of your screen that says “Conversion Complete!”. Now we can start designing!

conversioncomplete.png

1. Design your book.

Click either the “Step 4” option, or click “Design” in the top right toolbar to open the design tools, and follow the directions in your book text. (If you’re not using our sample text, then check out the documentation [here](https://www.hederis.com/demo.html).)

See you later!

1. Welcome back! Now let’s make a PDF.

Great work on your book design! Now let’s turn it into a PDF that you can send to a printer (or just admire).

Return to your dashboard if you haven’t already (there’s a button in the top right toolbar). Find the green “Rebuild” button beneath your cover, and press it.

Wait a few moments until you get a message that says “Build Complete!”

buildcomplete.png

Then in your list of downloadable files, click to download the PDF. When you open your downloaded file and scroll pages, you can see that the headings and text have all the design settings that you chose, and your running headers and footers are filled with the text and variables you set.

That’s it! Next steps would be to adjust your page breaks (sometimes called “paging” in publishing lingo) to fix any widows or orphans or weird hyphenations that you might have spotted—you can do that in the “Page Layout” menu on the Design tab—read more about that in “[Adjusting letter spacing, line breaks, and page breaks (PDF-only)](#TypesetPaging)”.

ATTRS=id: overview; data-tags: convert;

Overview

Hederis:Convert is based on the concept of “single-source publishing”. The fundamental principle of this type of publishing 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.

ATTRS=id: sample-workflow; data-tags: typeset;

A Real Sample Workflow

Here’s a sample workflow that a publisher might follow, using Hederis. In this scenario, we’ll begin when the manuscript isn’t quite done, but it’s time to start the design process and/or prepare a galley file. Steps that should occur in Hederis are marked with the Hederis logo, as well as which mode in the app you should be using at that point.

workflow-start.png

ATTRS=data-step-type: start

Upload the manuscript to Hederis

ATTRS=data-step-type: dashboard

Review the paragraph styles/coding and adjust as needed (in the Hederis text editor, or in Microsoft Word).

ATTRS=data-step-type: structure

If working in Word, reupload the updated manuscript to Hederis.

ATTRS=data-step-type: dashboard

Upload the book cover (to be used in the EPUB file), and any images that are used in your book (including logo images on the title page).

ATTRS=data-step-type: dashboard

ATTRS=data-step-type: single

Outside of Hederis, finish working on your manuscript (editing, copyediting, etc.).

ATTRS=data-step-type: external

ATTRS=data-step-type: left

Start creating the design in the Design tab (you can also import a design template from another book and use it as-is, or add customizations on top of it).

ATTRS=data-step-type: design-design

Build the PDF and EPUB files to use for your galley or ARC.

ATTRS=data-step-type: dashboard

ATTRS=data-step-type: right

ATTRS=data-step-type: bifurcate

Reupload final manuscript when it is ready.

ATTRS=data-step-type: dashboard

Upload the final book cover, and any retouched images that need to be updated.

ATTRS=data-step-type: dashboard

In the Design tab, finalize the design (taking into account any new styles that weren’t being used during the draft phase).

ATTRS=data-step-type: design-design

In the Page Layout tab, lock your pages so that the proofreader can mark-up line breaks and page breaks (see “Lock chapters to prevent reflow” for more information about this).

ATTRS=data-step-type: design-pagelayout

Rebuild and send out the PDF for proofread/first pass.

ATTRS=data-step-type: dashboard

Enter edits in the Design tab. For advanced text editing, make your changes in the text editor. (But beware of lock syncing! See “Lock chapters to prevent reflow” for more information about this.)

ATTRS=data-step-type: design-design

Make page layout adjustments in the Page Layout tab (tightening and loosening letter spacing, forcing page breaks, etc.).

ATTRS=data-step-type: design-pagelayout

Rebuild the PDF and repeat entering edits/rebuilding for more review passes as needed.

ATTRS=data-step-type: dashboard

Set your PDF export settings to comply with your printer’s requirements (bleed sizes, trim marks, grayscaling, etc.).

ATTRS=data-step-type: dashboard

Rebuild the final files (PDF, EPUB, Kindle EPUB, HTML).

ATTRS=data-step-type: dashboard

Send the PDF to your printer.

ATTRS=data-step-type: external

Extract sample content from the Hederis HTML, to post on your website, blogs, etc.

ATTRS=data-step-type: external

Validate your EPUB files (the standard EPUBCheck validation tool is built into the Hederis dashboard).

ATTRS=data-step-type: dashboard

Convert the Kindle EPUB to kf8 (using Kindle Previewer or a similar tool).

ATTRS=data-step-type: external

Distribute using your normal distribution method.

ATTRS=data-step-type: external

ATTRS=data-step-type: single

workflow-end.png

ATTRS=data-step-type: end

ATTRS=id: projects-home

Projects and Sharing

ATTRS=id: create-project

Create a New Project

ATTRS=id: projects-list

See All Your Projects

ATTRS=id: share-project

Share a Project

ATTRS=id: images-home

Images

ATTRS=id: add-an-image; data-tags: convert,typeset;

Add an image in Word

Hederis 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 (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.

ATTRS=id: images-with-captions-etc; data-tags: convert,typeset;

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

ATTRS=id: upload-a-cover; data-tags: convert,typeset;

Upload a cover file

Hederis 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 user interface.

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

ATTRS=id: include-full-page-images; data-tags: convert,typeset;

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 layout 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

ATTRS=id: resize-images; data-tags: typeset;

Resize an image in the design preview

You can resize images in the design preview using the Width and Height design options, which are located towards the bottom of the design tools sidebar on the left side of the screen.

To resize just a single image, do the following:

1. Click on the image in the design preview.
2. Choose “Only this Image holder” from the Selectors menu (located just below the Style List drop down menu).

resize-img-1.png

1. Scroll down to find the Width box, and enter your desired width (or height, in the Height box).

resize-img-2.png

1. Click Save and Run Layout.

To set all of the images in your book to the same width or height, perform the previous steps, but skip step 2 (the Selectors menu should read “All Image holders”). You can also combine both approaches: set a consistent width or height for all the images in your book, and then set a custom width or height for only certain images as needed.

ATTRS=id: grayscale-images; data-tags: convert,typeset;

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.

ATTRS=id: manuscripts-home

Manuscripts and Book Text

ATTRS=id: upload-a-manuscript; data-tags: convert,typeset;

Upload a Manuscript

To upload a Word manuscript to Hederis, 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 delete empty paragraphs when it processes your file - check the “Strip empty paragraphs” box to select this option.

ATTRS=id: semantic-tagging; data-tags: convert,typeset;

About Styles

“Styles” are a way to add semantic tagging to your manuscript. 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, 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.

ATTRS=id: paragraphs-wrappers-and-sections; data-tags: convert,typeset;

Paragraphs, Wrappers, Sections, and Inlines

<iframe width="800" height="450" src="https://www.youtube.com/embed/vAIajtvdjKM" frameborder="0" allow="accelerometer;encrypted-media;gyroscope;picture-in-picture" allowfullscreen></iframe>

HTML=true

There are four categories of styles 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, quote 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 be wrapped accordingly. Some other examples are poems, letters, epigraphs, and lists. See “[Add a Wrapper](#AddAWrapper)” for more on this.

In your Word manuscript, wrappers look like this:

wrapper1.png

Many people are accustomed to using paragraph styles for everything, which results in very large style sets. For example, you’d need separate styles for body text vs. a text paragraph inside an extract, or for an extract title vs. a sidebar title. By using wrappers, we make it much easier to manage the number of paragraph styles you need to use. You can use the *HED Plain text paragraph* style for both your main body text and for the text inside your extracts, and because your extracts are enclosed in a wrapper, you’ll still be able to design those paragraphs differently if you want to.

**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). These section break styles tell our app where and how to split up your manuscript, and these breaks are used to create book features like your ebook table of contents (you can have more granular control over that if you want to – check out “[Automatically Generate a Table of Contents](#TOCAutoGen)” for more). In Word, section breaks look like this:

sectbr.png

**Inlines** are the individual letters, words, and other symbols that make up your text. When you want to add a special meaning or style to a span of letters or words within a paragraph, you’d use an Inline style, like HED SPAN Bold, HED SPAN Small Caps, or HED SPAN Key phrase. [See the appendix](#ListofStyles) for a full list of our Inline styles.

Note

To request a new style for a type of content we don’t have covered with our existing styles, email us at [help@hederis.com](mailto:help@hederis.com).

ATTRS=id: edit-text-mode; data-tags: typeset;

Edit Text Mode

Access Edit Text mode by clicking the menu option in the top toolbar.

ATTRS=id: fine-tune-styles; data-tags: convert,typeset;

Working with Microsoft Word

When you upload a Word manuscript to Hederis, 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 instructions 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

The button to open the Styles pane looks different depending on which version of Word you’re using. Here are two examples of what it might look like.

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

stylespane2.png

The Styles pane will pop up either next to your document, or in a window of its own, and should look something like this.

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 the instructions here: <https://confluence.macmillan.com/display/PBL/View+Styles+Manually#ViewStylesManually-TheStylesPaneandStyleInspector>

ATTRS=id: add-a-wrapper; data-tags: convert,typeset;

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* style 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

Here’s how to add a wrapper around a group of paragraphs.

In the Hederis Edit Text mode, do the following:

1. Find the paragraph above which you want to add your new wrapper, and click to select it.
2. In the top menu, select Insert Wrapper, and choose the type of wrapper you’d like to insert.

Two new paragraphs will be inserted: one to mark the start of the wrapper, and one to mark the end. You can now move existing content inside the wrapper (see “Moving Text Around”), or add new paragraphs (see “Add a Paragraph”).

wrapper2.png

In Microsoft Word, do the following:

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

ATTRS=id: add-a-section; data-tags: convert,typeset;

Add a Section

Hederis 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. In your Word manuscript, section breaks look like this:

sectbr.png

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.

ATTRS=id: autogen-a-toc; data-tags: convert,typeset;

Automatically Generate a Table of Contents

Hederis can automatically generate a Table of Contents for you, and insert it into your print file in any location you choose. Additionally, you can specify not to include certain chapters or sections in your generated Table of Contents, and specify how many levels deep you want the Table of Contents to go (for example, you can include only chapter-level headings, or include nested subsections to any level). Here’s how:

Note

EPUB files will always include an auto-generated Table of Contents. You can use the same processing instruction option (see step 5 below) to exclude a section from the EPUB Table of Contents.

1. In your Word manuscript, insert a paragraph in the exact location that you’d like your Table of Contents to appear. This paragraph can use any style, and contain any text, which will be deleted when your generated Table of Contents is inserted.
2. Insert another paragraph below this placeholder paragraph, and style it with the *HED Processing instruction* style.
3. Inside this processing instruction paragraph, type the following text: **ATTRS=data-auto-toc: true; data-toc-level: 2**.

tocplaceholder.png

1. Set the level number to the depth of subsections that you’d like to include. For example, data-toc-level: 1 would only include chapter-level headings; data-toc-level:2 would also include the first level of subsections within any chapters; data-toc-level: 3 would include a further level of nested subsections within the first level of subsections; and so on.
2. To exclude a chapter or section from being listed in your Table of Contents, go to the section divider paragraph for the section that you want to exclude and insert a *HED Processing instruction* paragraph below the section divider paragraph.

If you already have a *HED Processing instruction* paragraph in that location, then there’s no need to insert another one—simply type a **+** after your existing processing instruction text, and then proceed to the next step.

1. Type the following text in your processing instruction paragraph: **ATTRS=data-toc-display: none**.

tocexclude.png

Here we have two examples of sections to be excluded from a Table of Contents. The first section also uses a processing instruction to suppress it from the print version of the book.

The next time you upload and build your PDF, a Table of Contents will automatically be created and inserted in the text. If you’d like your Table of Contents to appear in its own section, precede it with a *HED SECT TOC* paragraph, like this:

tocsection.png

For even finer control over your Table of Contents (e.g., to customize all the text that appears in each Table of Contents item), you can insert a Table of Contents manually. See “[Set up a Table of Contents Manually](#SetupTOC)” for instructions.

ATTRS=id: setup-a-toc; data-tags: convert,typeset;

Set up a Table of Contents Manually

You can customize the text that appears in your Table of Contents by setting it up manually in your Word file; once you’ve got it set up, Hederis will automatically add the final page numbers for you when you build the PDF. To set up a Table of Contents for Hederis, you 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 also 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

Finally, we’ll create the TOC links. Go back to the Table of Contents text that you added in the first step and do the following:

1. Select the whole text of one of your TOC items.
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.

ATTRS=id: include-custom-content; data-tags: convert,typeset;

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 layout 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.

ATTRS=id: design-home

Designing the Text

ATTRS=id: typeset-view-toolbar; data-tags: typeset;

The top-right toolbar: Single View, Guides, Grid, and Run Layout

<iframe width="800" height="450" src="https://www.youtube.com/embed/uJFdCjW8Rl8" frameborder="0" allow="accelerometer; encrypted-media; gyroscope; picture-in-picture" allowfullscreen></iframe>

HTML=true

At the top right of the previewer, you should see three rows of buttons. At the top are your standard page navigation buttons, to take you back to the Dashboard, to your Settings options, and the book info editor.

righttoolbar.png

Just below that, you have three buttons:

1. Single View: This doesn’t do much right now, but soon it will allow you toggle between viewing your pages as spreads or as single pages.
2. Guides: This button toggles your page guides on and off. This guides highlight the different margin areas and the page content area, so that you can see how everything lines up.
3. Grid: This toggles on and off your baseline grid, which is determined by your line-height setting in the General Page Design menu. When you turn this on, you’ll see a grid of horizontal lines on all your pages, so that you can adjust your text margins and padding as needed to ensure it all lines up with the baseline grid.

Below your view options, you’ll see the current page count for your book, and the Run Layout button. The Run Layout button will become your best “frenemy” as you use the app, and is how you reflow your content through your pages after you update the design.

Reflowing your content can take up to a couple of minutes, especially for longer books, so instead of forcing you to wait a couple of minutes every time you make one change, we’re putting you in control over when to reflow your pages. You can make a bunch of design adjustments all at once, and most of the changes will automatically appear in the previewer window (an example of things that won’t appear until after you click Run Layout are changes to margins and padding), but your text won’t reflow, which means that pages might run short or overflow as you make adjustments. Once you’ve made a handful of changes and really need to see the new pages (and page count), click Run Layout to trigger the page reflow.

Note

Improving the speed of the page reflow is one of our top priorities!

ATTRS=id: typeset-left-sidebar; data-tags: typeset;

The left sidebar: Design tools

The left sidebar is where you’ll find all your text design tools.

leftsidebar.png

At the top, you see your Save and Cancel buttons—remember to save early and often!

Below those buttons, you have menu tabs for Design and Page Layout, with the design tools selected by default.

The design tools are split into three different toolsets: General Page Design, Page Templates, and Sections & Text. You can jump between these toolsets using the dropdown menu at the top of the Design tab. We’ll describe those toolsets in detail in the following sections.

ATTRS=id: typeset-general-design; data-tags: typeset;

General Page Design

<iframe width="800" height="450" src="https://www.youtube.com/embed/uJFdCjW8Rl8" frameborder="0" allow="accelerometer; encrypted-media; gyroscope; picture-in-picture" allowfullscreen></iframe>

HTML=true

In this toolset, you can configure your trim size, as well as type settings that will cascade down to all the elements in your book (but you can customize each element, as described in Sections & Text).

ATTRS=id: typeset-master-pages; data-tags: typeset;

Page Templates

<iframe width="800" height="450" src="https://www.youtube.com/embed/OVFvTesq8-E" frameborder="0" allow="accelerometer; autoplay; encrypted-media; gyroscope; picture-in-picture" allowfullscreen></iframe>

HTML=true

Page templates control the general layout of all the different sections in your book. This is different from a book’s design template: a design template includes design instructions for all the paragraphs and elements in your book, as well as the running content, margin widths, and so on. Page templates, however, determine only the page margins, where the running headers and footers go and what kind of content should appear in them, and how to format that text. Page templates are just one part of a book’s design template.

You can configure 5 different page templates: chapters, 2 types of frontmatter, backmatter, and parts. While these page templates are applied to certain types of sections by default, you can change the page template that is used in any section, in the Sections & Text toolset.

Note

We include two types of frontmatter page templates because books will often have certain frontmatter—like title pages and copyright pages—that needs a different page layout (e.g., reduced top margin height, or removing all the content from the running headers and footers).

Each type of page template has 4 pages that can be configured:

1. **The first page of the section:** You can change the top and bottom margins for the first page of the section, or change the running header and footer content. For example, you might choose to insert just the page number at the bottom of the first page, and then to include full running headers and footers on your recto and verso pages.
2. **Recto and verso pages:** These are the main content pages of your section, and this is also where you set the inside and outside margins that will be applied to all the pages in your section (including first and blank pages).
3. **Blank pages:** Sometimes a section will include pages that don’t include any book content—for example, if this section ends on a recto page, but the next section is required to also start on a recto page, then an extra blank verso page will be added to the end of the first section. In these cases, you can choose to suppress the running header and footer content, or have different running headers and footers appear.

Running headers and footers can consist of text content, or use our built-in variables. To add text to your running headers or footers:

1. Click the margin area that you want to add content to.
2. Click inside the text box, and type an opening quotation mark (“).
3. Now type the text that you want to appear, and then type a closing quotation mark (”).
4. Finally, press the Enter or Return key. Your text will appear as a gray bubble. To remove your typed text, simply press the X immediately to the right of the gray bubble.

Variables let you insert dynamic content that is pulled right from your book text, like the most recent chapter title, the book title, or the author name. You can also insert a variable to dynamically add the up-to-date page number. To include a variable, simply click on it and it will appear in the text box as a green bubble.

runheadfoot.png

This example shows a running footer that uses our built-in Page Number variable, and a running header with text content.

You can also combine text and variables, by following the same steps above for each type of content you want to include.

ATTRS=id: typeset-text-design; data-tags: typeset;

Sections & Text

This is where you’ll find all the tools for designing the text of your book, and where you’ll probably spend most of your time. The options that appear here change based on the type of element you have selected. The first thing in this toolset is the element selection dropdown menu, which lists all the types of elements in your book. Choose a type of element, and you’ll see a variety of options appear, as outlined in the next sections.

By default, your designs will apply to every element of a certain type within your book (e.g., every wrapper that uses the “BOX extract” style, or every paragraph that uses the “Plain text paragraph” style), but you can limit your design to a subset or even just a single element. Click on a paragraph in the preview window, and the Selection dropdown menu will become activated and give you a variety of options:

* **Only this element.** You can customize the formatting of any individual element or paragraph.
* **This type of element inside this type of parent.** Because of the way that book content is nested in Hederis, you can limit your formatting based on the type of element that your selected paragraph is inside of. For example, “Plain text paragraphs” inside of “Extract wrappers,” or “Chapter Titles” that only occur inside of Chapters (but not Prefaces or Appendixes or any other type of section).
* **First element like this inside this type of parent.** Similarly, you can limit your formatting to apply only to the first occurrence of a type of paragraph inside its parent.
* **This type of element that follows the previous type of element.** You can also limit your formatting to apply only to elements that follow a specific other type of element. This is great for removing the indent from chapter opener paragraphs: you can format all “Plain text paragraphs” that follow a “Chapter Title.”

subselectors.png

Here's an example of what you might see in the Selection dropdown menu when you click on a “Plain text paragraph” in the preview window.

ATTRS=id: typeset-sect-design; data-tags: typeset;

Designing SECT elements (sections)

All the content in your book is split up into different types of sections (see “[Paragraphs, Wrappers, and Sections](#ParaWrapSect)”), and you have just a few options for designing each section:

The first option, Page, is where you choose the type of page template to apply to this type of section. You can also choose to always start this type of section on a recto page, and to restart the page numbering at 1 for this specific section (for example, if this is the first chapter after the frontmatter).

sectelements.png

ATTRS=id: typeset-box-design; data-tags: typeset;

Designing BOX elements (wrappers)

Sometimes text needs to be set aside from the main flow of text in some way, for example as an extract or note (see “[Paragraphs, Wrappers, and Sections](#ParaWrapSect)” for more about this). You can format the text in your wrappers differently from the rest of your text, and you can add borders and extra spacing around your wrappers. You can also set a specific width or height for your wrappers, or let the wrappers size themselves automatically based on the width of the text inside the wrapper (choose “auto”).

ATTRS=id: typeset-para-design; data-tags: typeset;

Designing text paragraphs

You can completely customize the text formatting for every type of paragraph in your book, including the font family, size, line height, alignment, and more. You can also add borders to your paragraphs, and add extra space above and below.

If you turn on the “Float to bottom?” checkbox, that type of paragraph will get positioned at the bottom of the current page. This is great for titlepages, for example if you want to position the publisher name at the bottom of the page.

ATTRS=id: custom-font; data-tags: typeset;

Use a Custom Font

You can upload your own fonts from the Sections & Text menu in the Design preview. Choose an element to design, scroll down to the Font section, and click the “Upload Font” button.

ATTRS=id: selectors; data-tags: typeset;

Adjusting the design of only certain paragraphs

Sometimes you only want to adjust the design of a specific paragraph, or a subset of paragraphs. For example, you may want to design Plain Text Paragraphs that appear inside of Note boxes differently than the Plain Text Paragraphs in your main text flow. Or, you may want to remove the text indent from every Plain Text Paragraph that follows a heading.

The great news is that you don’t need to create new styles for all of these types of variations; when you’re working with HTML, you can do this with the power of selectors! When you click on a paragraph in your paged preview, you’ll see another dropdown menu in your design tools sidebar, below the paragraph style name—these are your selector options. There are 5 types of selectors you can choose from:

selectors.png

When you click on a paragraph in your paged preview, you’ll have 5 options in the Selectors dropdown menu.

* **All**: The design you choose will apply to all paragraphs that use this style name. This is the default, and is what will happen if you choose a style name from the previous dropdown menu, rather than clicking on a paragraph.
* **Only thi**s: Your design settings will only apply to the currently selected paragraph (i.e., the paragraph that you clicked on).

**Note:** When you’re working with these kinds of selectors, the changes may not immediately appear in the preview window, but if you click Save and then Run Layout, you’ll see your new design applied.

* **Inside**: This option lets you limit the scope of your design to only apply to paragraphs that use this style and are inside the same kind of parent element that your currently selected paragraph is inside of. For example, if you were to click on a paragraph inside an extract, then this option would read “Plain text paragraphs inside BOX Extract.” This allows us to reuse the same style name inside different types of parents, but create different designs depending on the container—you can use this selector to make all plain text paragraphs inside an extract look different than the rest of the plain text paragraphs in the chapter.
* **First**: Similarly, you can also limit your design to only the first instance of this style inside of a specific parent. For example, you could remove the indent from the first plain text paragraph inside your extract.
* **Following**: Finally, you can create designs based on the order of elements in your book. For example, if you want to remove the indent from every plain text paragraph that follows a chapter title, you’d use this option (note that you have to actually find an instance in your book of a plain text paragraph following a chapter title, and then click on it, in order for this option to appear in your Selector menu). This is great for adding spacing around elements, without needing to create all new styles.

**Note:** When you’re using these kinds of selectors, it’s very important that you re-download the Word file from Hederis any time you want to make extensive changes to the text. This allows us to store information about which paragraphs in the manuscript have custom designs applied. If you don’t use the updated Word file, then all your custom design work could get lost!

ATTRS=id: adjust-trim-and-margins; data-tags: convert;

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.

ATTRS=id: add-printer-marks; data-tags: convert,typeset;

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.

ATTRS=id: view-baseline-grid; data-tags: convert;

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.

ATTRS=id: custom-design; data-tags: convert,typeset;

Add special layout instructions

You can tweak the design and layout of specific paragraphs, sections, or wrappers in your book by adding special instructions to your Word file, called *processing instructions*. We use processing instructions to convey a variety of different types of instructions: customizing running header content, adding CSS styles, adding attributes to the HTML, fixing image sizes, and more.

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 these design and layout instructions: “HED Processing instruction”.

PI1.png

To add your processing 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

Tip

Some processing instructions accept extra options that change their behavior. For example, the GLOBAL STYLE and ATTRS processing instructions can both accept the SCOPE-BODY option, which will apply your custom instruction to the entire document, rather than to just a single element or group of elements. See “[Customize the design of an entire group of paragraphs, wrappers, or sections](#GlobalStylePI)” and “[Add custom HTML attributes](#AttrPI)” for more info on how to do this.

Processing Instruction codes:

|  |  |  |  |
| --- | --- | --- | --- |
| **Code** | **Possible values** | **Notes** | **Documentation** |
| 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. | See “[Include full-page images in the PDF](#FullpageImg)” |
| STYLE | Any valid CSS property/value combination ([see this reference](https://developer.mozilla.org/en-US/docs/Web/CSS/Reference)) |  | See “[Customize the design of specific paragraphs, wrappers, or sections](#StylePI)” |
| FORMAT | ebook, print | Display a certain paragraph, wrapper, or section only in the ebook or PDF file. Default value is “both”. | See “[Include content only in the PDF or EPUB](#CustomContent)” |
| GLOBAL STYLE | Any valid CSS property/value combination ([see this reference](https://developer.mozilla.org/en-US/docs/Web/CSS/Reference)). Also supports the “SCOPE-BODY” option. | To add custom design formatting to an entire group of elements (for example, to add a border around every extract in the entire book). | See “[Customize the design of an entire group of paragraphs, wrappers, or sections](#GlobalStylePI)” |
| ATTRS | The name and value of one or more [HTML attributes](https://developer.mozilla.org/en-US/docs/Web/HTML/Attributes). Multiple attributes should be separated by a semi-colon. Also supports the “SCOPE-BODY” option. | You can use [predefined HTML attributes](https://developer.mozilla.org/en-US/docs/Web/HTML/Attributes), or make up your own attributes that start with the “data-” prefix. | See “[Add custom HTML attributes](#AttrPI)” |

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

ATTRS=id: custom-paragraph-design; data-tags: convert;

Customize the design of specific paragraphs, wrappers, or sections

You can use processing instructions (see “[Add special layout instructions](#AddPIs)”) to customize the design of individual paragraphs, wrappers, or sections in your manuscript. These design instructions are created with CSS, and will apply to both the PDF layout and the EPUB file. For the best results, make sure your CSS is valid, and add it without any extra line breaks or carriage returns (see the images below for examples). You can [learn more about CSS here](https://developer.mozilla.org/en-US/docs/Web/CSS/Reference).

To customize a paragraph’s design:

1. Find the paragraph that you want to customize, and insert a new HED Processing instruction paragraph below it (for more details on how to do this, see “[Add special layout instructions](#AddPIs)”).
2. In your processing instruction paragraph, type the text STYLE=, and then type the CSS that you want to apply to your paragraph.

pi2.png

If you want to customize a wrapper, insert the processing instruction paragraph after **either** the wrapper “start” or “end” paragraphs, as shown below:

stylepiwrapper.png

To customize an entire section, insert the processing instruction paragraph after the section start paragraph, as shown here:

stylepisection.png

Note that your custom design will be applied to both the PDF and EPUB formats, as best as possible, so you may need to include fallbacks in case a certain CSS value is supported in one format but not the other. One example of this is color spaces: while you may want to use CMYK colors in your PDF output, the CMYK color space is generally not supported in the EPUB format. To get around this, include a fallback, like this:

stylepicolorfallback.png

Here, the layout engine will attempt to use the CMYK value first, and if it finds that it is not supported, it will fall back to the web value (which is supported on all web browsers and EPUB reading devices).

ATTRS=id: global-paragraph-design; data-tags: convert;

Customize the design of an entire group of paragraphs, wrappers, or sections

You can also use processing instructions to customize the design of an entire style. For example, you can customize the design of every paragraph in your book that uses the “HED Box type” style. Similarly, you can customize the design of wrappers and sections in your book (for example, every letter in the book, or every appendix section). Follow the instructions in the previous section, but instead of using the STYLE processing instruction keyword, use GLOBAL STYLE, like this:

globalstyle.png

Using the SCOPE-BODY Option

You can also apply styles to your entire document, by using the SCOPE-BODY option in your GLOBAL STYLE processing instruction. This will expand the scope of your custom styles, so that they apply to the entire body of your manuscript, rather than being limited to just a group of elements. To do this:

1. Type your GLOBAL STYLE processing instruction, as described above.
2. At the very end of this processing instruction (but before any additional processing instructions that you’ll be adding via the “+” option, as described in “[Add special layout instructions](#AddPIs)”), type: SCOPE-BODY.

Your styles will now be applied to the entire manuscript.

globalscopebody.png

In this processing instruction, we’re overriding the running header text with our own custom text. You can read more about this code snippet in “[Custom Styles Library](#StyleLibrary)”.

ATTRS=id: convert-template-designer; data-tags: convert;

Create a custom design template

You can use the simple template designer to customize the look and feel of your Hederis:Comvert projects. On the Project Dashboard, go to “Step 3: Pick or Create a Template”, and click the Create Template button. You’ll be taken to the template builder, where you can configure a variety of design options, as follows:

General Page Setup

You can configure the default trim size for your new template, and choose whether or not chapters should always start on a recto (right-hand) page.

Page Margins

In this menu, you can set the default margins for your chapters, and also configure the running header and footer content. Running headers and footers can consist of text content, or use our built-in variables. To add text to your running headers or footers:

1. Click inside the text box, and type an opening quotation mark (“).
2. Now type the text that you want to appear, and then type a closing quotation mark (”).
3. Finally, press the Enter or Return key. Your text will appear as a gray bubble. To remove your typed text, simply press the X immediately to the right of the gray bubble.

Variables let you insert dynamic content that is pulled right from your book text, like the most recent chapter title, the book title, or the author name. You can also insert a variable to dynamically add the up-to-date page number. To include a variable, simply click on it and it will appear in the text box as a green bubble.

runheadfoot.png

This example shows a running footer that uses our built-in Page Number variable, and a running header with text content.

You can also combine text and variables, by following the same steps above for each type of content you want to include.

Margin Text Formatting

You configured the content of your running headers and footers in the previous menu, but this is where you configure the actual appearance of all your running headers and footers. You can choose the font family, font size, and whether the text should be bold or italic.

Main Text Formatting

This is where you set some of the over-arching features of your book text. You can choose different fonts and text settings for your main text versus your headings, and set your general line-height and text-indent values.

To keep all your text lined up with the baseline grid, we let you add space above and below your headings in increments of your line height. For example, if your line height is 14pt, and you set Heading Lines Above to “2”, this will translate to a space above your headings of 28pt.

Note

If you need more control over different elements in your book—for example, to set different font and text settings for extracts or individual paragraphs, you can either use [processing instructions](#StylePI), or change your project to use our Typeset app, which gives you full visual control over every element in your book.

Titlepage Text Formatting

Titlepages and half-titlepages often need to be laid out differently than the rest of your text, so we give you extra options here. You can configure the font size, alignment, and more in this menu.

Frontmatter, Part, Backmatter

You can also customize the headings and chapter openers for your frontmatter sections, backmatter, and part pages.

Additionally, you can choose to use lower-roman numerals for your frontmatter page numbers.

ATTRS=id: custom-design-templates; data-tags: convert,typeset;

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? Email info@hederis.com to learn more about this option.

ATTRS=id: templates-home

Design Templates

ATTRS=id: paging-home

Paging

ATTRS=id: page-locking;

Lock chapters to prevent reflow

Locking is a potentially important part of the Hederis workflow.

ATTRS=id: page-layout-menu; data-tags: typeset;

Adjusting letter spacing, line breaks, and page breaks (PDF-only)

In the left sidebar, next to the Design tab, you should see the Page Layout tab, which is where all your paging tools live: tightening and loosening text, and inserting line breaks and page breaks. Select some text in the preview window, and the options will be activated.

ATTRS=id: adjust-line-breaks; data-tags: convert;

Adjust letter spacing (PDF-only)

You will undoubtedly find that there are page breaks or line breaks in your PDF that are less than optimal, or lines that are set with too much (or too little) white space. One way to adjust these is to adjust 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.

ATTRS=id: force-line-break; data-tags: convert;

Force a line break (PDF-only)

If the lines in a paragraph aren’t breaking quite where you’d like them, you can use character styles to adjust them. Use the *HED SPAN Line break after* character style to force a line to break after a specific word or character. These breaks will only appear in the PDF, and your EPUB file will still reflow and break naturally. Here’s how to insert specific line breaks:

1. Find the word or character that you want the line to break after. This character will appear at the end of the current line, and any text following it will appear at the beginning of a new line.
2. Select the word or character, and in the Styles pane (see “[Fine-tune Word Styles](#FinetuneWord)” for more about the Styles pane), click to apply the *HED SPAN Line break after* character style*.*

forcelinebr.png

You won’t notice a major change in your Word document, but the next time you create a PDF, you should see the lines break in the location you chose.

**To remove the break**: select the text again (we recommend selecting a bit of extra text before and after the styled text as well, just to be safe), and in the Styles pane, click the *Normal* character style to apply it.

ATTRS=id: force-page-break; data-tags: convert;

Force a page break (PDF-only)

While our pagination algorithm does its best to break pages in the best location, sometimes it falls short of your expectations. You can use character styles and processing instructions to insert page breaks after specific words or characters, or after a specific paragraph. These page breaks will only appear in your PDF, and your EPUB will still reflow and break naturally.

Force a page break after a specific character

You can insert a page break after a specific word or character in your text by using character styles. Here’s how:

1. Find the word or character that you want the page to break after. This character will appear at the end of the current page, and any text following it will appear at the beginning of the next page.
2. Select the word or character, and in the Styles pane (see “[Fine-tune Word Styles](#FinetuneWord)” for more about the Styles pane), click to apply the *HED SPAN Page break after* character style*.*

forcecharbr.png

You won’t notice a major change in your Word document, but the next time you create a PDF, you should see the page break in the location you chose.

**To remove the break**: select the text again (we recommend selecting a bit of extra text before and after the styled text as well, just to be safe), and in the Styles pane, click the *Normal* character style to apply it.

Force a page break after a paragraph

To force a page to break after an entire paragraph, you’ll use a processing instruction (see “[Add special layout instructions](#AddPIs)” for more background info). Here’s how:

1. In your Word document, find the paragraph that you want the page to break after.
2. Insert a new paragraph directly after that chosen paragraph.
3. In the Styles pane, find the *HED Processing instruction* style, and click to apply it to your new paragraph.
4. In your new processing instruction paragraph, type the following:

ATTRS=class: pageBreakAfter

forcebr.png

The next time you create a PDF, you should see the page break in the location you chose.

To remove the break, simply delete the new processing instruction paragraph that you created in the steps above.

ATTRS=id: validation-home

Validation and Preflight

ATTRS=id: pdf-preflight; data-tags: convert,typeset;

PDF preflight and prepress

PDF preflight is not currently built into Hederis. 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.

ATTRS=id: epub-validation; data-tags: convert,typeset;

EPUB Validation

We recommend that you run the epubcheck validation tool on your files before distribution, to ensure that there are no errors. You can run the standard EPUBCheck validation tool right from your project Dashboard.

1. Scroll down to find the menu labeled “Validate you files” and click to expand it.
2. Click the “Validate with EPUBCheck” button, and wait for the validation to finish.

The EPUBCheck results will be printed right there on your Dashboard, along with the book metadata that EPUBCheck detected in your file. This report will disappear when you close the menu option, but you can re-run it at any time.

If there are any validation errors, let us know and we can help you troubleshoot solutions: help@hederis.com

ATTRS=id: groups

Users, Groups, and Billing

ATTRS=id: billing-info; data-tags: typeset;

Add Your Billing Information

ATTRS=id: about-groups

About Groups

ATTRS=id: create-group; data-tags: typeset;

Create a Group

ATTRS=id: group-billing; data-tags: typeset;

Set Up Billing for Your Group

ATTRS=id: files-home

File Management

ATTRS=id: appendix-home

Appendix

ATTRS=id: custom-attributes; data-tags: convert,typeset;

Add custom HTML attributes

You can add custom HTML attributes to your final HTML, if you’ll be using the HTML in your own processes later – these attributes will also be included in your EPUB file. For example, you can customize the ID for a section, or you can add special role attributes to certain paragraphs so that your EPUB conforms to your company’s internal specification.

To add a custom attribute, use a [processing instruction](#AddPIs), like this:

1. Find the paragraph that you want to add custom attributes to, and insert a new “HED Processing instruction” paragraph below it (for more details on how to do this, see “[Add special layout instructions](#AddPIs)”).
2. In your processing instruction paragraph, type the text ATTRS=.
3. Next, type the attribute name, followed by a colon, and then the attribute value.
4. To add more custom attributes, type a semi-colon, and then type the next attribute name, followed by a colon, and then the attribute value, and so on.

customattrs.png

To add a custom attribute to a wrapper, insert the processing instruction paragraph after **either** the wrapper “start” or “end” paragraphs. (See “Customize the design of specific paragraphs, wrappers, or sections” for an example of what this looks like.)

To add a custom attribute to an entire section, insert the processing instruction paragraph after the section start paragraph. (See “Customize the design of specific paragraphs, wrappers, or sections” for an example of what this looks like.)

Using the SCOPE-BODY Option

You can also apply attributes to your entire document, by using the SCOPE-BODY option in your ATTRS processing instruction. This will apply the selected attribute to the main container element of your manuscript, rather than being applied to the immediately preceding element. To do this:

1. Type your ATTRS processing instruction, as described above.
2. After the custom attribute value, but before the closing semi-colon, type: SCOPE-BODY.

Your attribute will now be applied to the body element.

globalscopebody.png

In this processing instruction, we’re overriding the running header text with our own custom text. You can read more about this code snippet in “[Custom Styles Library](#StyleLibrary)”.

Note that the SCOPE-BODY option must be invoked for each attribute that you want to apply to the body. For example, in the image below, because only the “data-author-name” attribute invokes the SCOPE-BODY option, only that attribute will be applied to the entire body, and the “id” attribute will be applied to the immediately preceding element (in this case, the chapter title) as usual.

attrscopebody.png

ATTRS=id: custom-style-library; data-tags: convert;

Custom Code Library

Here are some custom processing instructions that you can copy, for frequently-requested customizations:

Override the author name in the running header

GLOBAL STYLE= string-set: authorname attr(data-author-name); SCOPE-BODY+ATTRS=data-author-name: **INSERT YOUR NAME** SCOPE-BODY;

This processing instruction allows you to override the author name that appears in the running header of your predefined template; include it after any paragraph, wrapper, or section. The author name text is traditionally pulled from any paragraph on your title page that is tagged with the *HED Author name* style; by using this processing instruction, you override that default text.

This processing instruction consists of two parts: a GLOBAL STYLE instruction that applies your custom text to the entire manuscript, and then an ATTRS instruction that contains a custom attribute with your new author name text, which will be applied to the main body container of your manuscript. In this snippet, the only bit that you need to change is the bolded “INSERT YOUR NAME” text – replace this with the text of your choice.

Override the book title in the running header

GLOBAL STYLE= string-set: booktitle attr(data-book-title); SCOPE-BODY+ATTRS=data-book-title: **INSERT YOUR TITLE** SCOPE-BODY;

This processing instruction allows you to override the book title that appears in the running header of your predefined template; include it after any paragraph, wrapper, or section. The book title text is traditionally pulled from any paragraph on your title page that is tagged with the *HED Chapter title* style; by using this processing instruction, you override that default text.

This processing instruction consists of two parts: a GLOBAL STYLE instruction that applies your custom text to the entire manuscript, and then an ATTRS instruction that contains a custom attribute with your new book title text, which will be applied to the main body container of your manuscript. In this snippet, the only bit that you need to change is the bolded “INSERT YOUR TITLE” text – replace this with the text of your choice.

ATTRS=id: list-of-word-styles; data-tags: convert,typeset;

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

Number labels for any book section or wrapper, e.g., “Chapter 1”, or “Example 12”.

HED Chapter/Section title

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

HED Closing

The closing line of a letter, e.g., “Sincerely,”.

HED Code paragraph

A block of computer code.

HED Contributor

A book or section contributor, other than the author. For example, the name of an illustrator or editor that might appear on the titlepage or at the beginning of a chapter.

HED Dateline

A dateline.

HED Definition definition

The definition paragraph in a set of term/definition pairs. This paragraph is an example of the definition paragraph that corresponds to the term above.

HED Definition definition (contd)

A continuation paragraph for a multi-paragraph definition, as defined above.

HED Definition term

A term to be defined, often followed by a *HED Definition definition* paragraph.

HED Dialogue paragraph

Dialogue.

HED Endnote paragraph

A paragraph in an endnote.

HED Footnote paragraph

A paragraph in a footnote.

HED Generic heading

A generic heading, often used in the middle of boxes or sidebars when you want to introduce a block of text without creating a formal sub-section. Also often used as a heading preceding a letter body, e.g., “CONFIDENTIAL”.

HED Generic subheading

Similar to the generic heading, a second level of heading that can be used when you want to create a logical grouping of text without creating a formal sub-section.

HED Image holder

A placeholder for an image. See “[Add an image](#AddanImage)” for more.

HED Image source

The source of an image, e.g. “Courtesy of Getty Images”.

HED Imprint name

The name of your imprint, often included on a titlepage.

HED Line space

A line space, often used to create a logical break in time or context.

HED List item (contd)

A second paragraph in a multi-paragraph list item (can be used for both bulleted and numbered list items).

HED List item – Bulleted

A bulleted or unordered list item. For multi-level lists, use the *HED BOX Bullet List* wrapper, nesting multiple levels of list wrappers within it, like this:

nestbulllist.png

HED List item – Numbered

A numbered or ordered list item. For multi-level lists, use the *HED BOX Num List* wrapper, nesting multiple levels of list wrappers within it, like this:

nestnumlist.png

HED Location

A location, for example the location of your office as it appears on the book titlepage, or the location in which a chapter is set.

HED Mark for Deletion

A paragraph that should be deleted in the final output.

HED Ornamental space

An ornamental break in the text, often used to create a logical break in time or context and containing a visual ornament.

HED Plain text paragraph

This versatile style is used for plain text, for example in the main flow of a chapter, or a paragraph of text in an extract, or the body text of a letter. See “[Paragraphs, Wrappers, and Sections](#ParaWrapSect)” for more about this.

HED Plain text paragraph (contd)

If a paragraph is broken up by an image or other content, use this style for the continuing text of the paragraph.

HED Postscript

A postscript, as in a letter or foreword, e.g., “P.S., don’t forget to buy milk!”.

HED Processing instruction

This special Hederis style is used to add extra instructions about how to transform the paragraphs and sections of your manuscript. See “[Add special layout instructions](#AddPIs)” to learn all about processing instructions.

HED Publisher name

The name of your publisher, for example appearing on a titlepage.

HED Quote paragraph

A quote, that you don’t necessarily want to appear inside an extract.

HED Salutation

A salutation, for example in a letter or foreword, e.g. “Dear reader,”.

HED Signature

The signature of the author of a block of text, for example in a letter or foreword.

HED Speaker name

A speaker in a block of dialogue.

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

A table of contents entry for a backmatter section.

HED TOC entry – chapter

A table of contents entry for a chapter.

HED TOC entry – frontmatter

A table of contents entry for a frontmatter section.

HED TOC entry – part

A table of contents entry for a 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

Inline styles are styles that you apply just to a few words or characters within a paragraph, without affecting the rest of the text in the paragraph. Hederis supports most of Word’s built-in character formatting tools (like italics, bold, underline, etc.), so you don’t need to use inline styles for everything. However, there are a few cases where inline styles come in handy:

HED SPAN Small Caps Text

HED SPAN Emphasis Text

Text that should be emphasized both visually and while being read aloud. This style is typically represented as italics. (In modern web development, “emphasis” has replaced “italic” as a code to add emphasis to your text.)

Note that you can use Word’s built-in Italic formatting button, and this style will automatically be applied when the .docx file is converted in Hederis.

HED SPAN Strong Text

This style is typically used for bold text. (In modern web development, “strong” has replaced “boldas a code to add weight to your text.)

Note that you can use Word’s built-in bold formatting button, and this style will automatically be applied when the .docx file is converted in Hederis.

HED SPAN Superscript Text

HED SPAN Subscript Text

HED SPAN Inline Link

A Link or url.

HED SPAN Abbreviation Text

An abbreviation.

HED SPAN Key phrase

A word or phrase that should be differentiated from the rest of the text, but doesn’t fall into any of the other Inline Style categories.

HED SPAN Number

A numbered element, nested inside another paragraph. For example, this tag would be used to style a chapter number that runs in with the chapter title text, e.g. “1 Down the Rabbit Hole”.

HED SPAN Introductory text

The first few letters or words of a paragraph or chapter.

HED SPAN Loosen spacing

Loosen the character spacing in a span of text in the PDF. See “[Adjust letter spacing (PDF-only)](#AdjustPageBreaks)” for more.

HED SPAN Tighten spacing

Tighten the character spacing in a span of text in the PDF. See “[Adjust letter spacing (PDF-only)](#AdjustPageBreaks)” for more.

HED SPAN Line break after

Insert a line break after a word or character. See “[Force a line break (PDF-only)](#ForceLinebr)” for more.

HED SPAN Page break after

Insert a line break after a word or character. See “[Force a page break (PDF-only)](#ForcePagebr)” for more.

HED SPAN Note reference

HED SPAN Note marker

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 Ad Card

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