

## **Building & Modifying a Template**

**December 11th, 2014**

**Alrighty ladies. I am content with the document. Microsoft Word is one of those programs that's like mud-wrestling a pig— you get in there, get dirty, never win, and the pig likes it the whole time.**

I've sent you the document as a .doc and .pdf.

One of my concerns is that it will not display properly on your end—the .pdf will appear as I made it. The .doc may appear different.

Reason? Likely because you don't have the same fonts, so I've included both of them in this .zip file. Installing them should be your first course of action **before opening the .doc file.**

Alright, first is a style guide for you or future designers based on this document.

If you want changes to the design of the document, obviously the style guide will have to change.

What I've done is list the the rules I built first, then I supply a reference index covering the 'how-to' of certain styles that you may or may not know how to do.

That reference appendix is alphabetical.

Anything I think you'll want reference to, **I've indicated in red.**

# Style Guide

COLORS



House Blue  
RGB: 27,40,86  
Hex: #1C2956



House Blue  
RGB: 227,231,191  
Hex: #E3E7BF



Document Grey  
RGB: 37,37,37  
Hex: #231F20



Light Grey  
RGB: 166,165,165  
Hex: #A6A5A5



Logo is positioned top left of first page, within the first 1" margin. It should have margins equal on left and top sides.

**BAY AREA UASI**

Title is set in Gotham Medium, House Blue. **Text is expanded by 4pt.** It should be indented 1/3 of the way down the page.

*[Name of Jurisdiction]*

Subtitle should be set in Bell MT, Light Grey 18 pt. In the case of the current content, substitutable text is bracketed with House Green square brackets. These are not italicized.

COVER PAGE

Continuity of Operations  
Sample Plan Template

Document Description should be set in Bell MT Regular, Document Grey, 18pt

*September 24, 2014*

Document Date should be set in Bell MT, Regular, Document Grey, Italic, 18pt

It should be set 1/3 from the bottom of the page

TABLE OF CONTENTS

TABLE OF CONTENTS

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Header is set in Gotham Medium, 14 pt, House Blue. Text is expanded by 3pt.  
**Line Spacing is set** at Multiple 1.25.  
**Border is set on bottom** as 3pt, House Blue.

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Section Headings are set in Gotham Medium, 12 pt, House Blue, **small caps**.

The dots leading to the number are set in House Blue, Bell MT. Text is expanded by 4pt.

I. EXECUTIVE SUMMARY ..... 3

Two spaces are placed at the end of the header to space it out from the dots.

The number itself is set in Gotham Medium, 11pt.

The first section header (directly below ToC header) has a **line spacing before set at 12pt**.

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Sub Section Headings are set in Bell MT, 11pt.

The dots leading to the number are set in Light Grey, Bell MT. Text is expanded by 4pt.

The number itself is set in Bell MT, 11pt.

Any ‘ands’ have been replaced with ampersands. These ampersands are italicized.

Any acronyms have been set in small caps, 10pt. The text is expanded by 1pt.

Time-Phased COOP Implementation ..... 6  
    *Phase 1: Activation & Relocation* ..... 7

**BODY  
CONTENTS**

**I. EXECUTIVE SUMMARY**

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Headings are set in Gotham Medium, 14 pt, House Blue. Text is expanded by 3pt, except the roman numeral.

Insert a brief outline of the organization

Body text is set in Bell MT Regular, 11pt, Document Grey.

Line spacing is set at Exactly 14 pt.

'Return' is pressed twice to make paragraphs.

**Note:** In certain instances, the Line Spacing before has been modified by a range of 1-4pts in order to keep sections together.

Designer discretion—more important that there are no 'hanging lines' than exact, constant spacing document-wide.

Continuity of Operations Plan (COOP)

The first use of an acronymized agency or plan has been bolded, as well as its acronym.

PURPOSE

Section subheadings are set in Gotham Medium, House Blue, 12pt.

Line spacing is set to 14 pt exactly, 16pt before, 3pt after.

**BODY  
CONTENTS**

**Prioritized Listing of Critical Functions**

*COOP Workbook*

**Essential Functions** are those functions that enable an organization to:

1. *Maintain the Safety of the General Public*
2. *Provide vital services*
3. *Those required by Law*
4. *Sustain the industrial and economic base*

- Reduce disruptions to operations;
- Protect critical facilities, equipment, records, and other assets;
- Assess and minimize damages and losses;
- Provide organizational and operational stability;
- Facilitate decision-making during an emergency;

Sections of provided materials are bolded for emphasis.

The Handbooks or Workbooks they are supplied in are italicized.

Callout Textboxes are set in Bell MT, 9pt, Document Grey.

The first few words or major concept are bolded.

**Set the Autoshape border** to weight of 3pt, House Green, with a double-line style.

As much as possible, given Word's maneuvering constraints, the text is set equally from all sides. **Or**, if the text is wider than it is tall, more margin is provided in width. If it is taller than wide, then vice versa. The example here is taller than wide.

Bullets are set to indent at 0.35" with a Tab Stop added at .5".

**The bullet itself is set in Light Grey.**

**BODY  
CONTENTS**

**PHASE**

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**Table headings are set in Gotham Light, 11pt, small caps, House Blue.**

**The line spacing after is set to 5pt.**

**The border is set on bottom to a single line, 1/2pt, House Blue**

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*Phase 3 –  
Reconstitution*

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**Table Cells that serve as ‘categories’ or ‘headings’ are set in Bell MT 11pt.**

**I’ve italicized ‘Phase x’ and I’ve put a return after em-dash to make the headings identical in form.**

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- 
- Provide guidance to contingency team personnel and information to the public.
  - Identify replacements for missing personnel (delegation of authority and orders of succession).
  - Etc.
- 

**Table Cells with multiple points of information are set in Bell MT, 10pt.**

**All Table Cells are set with a border on the bottom, 1/2 pt, Light Grey.**

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This project is funded by the Bay Area UASI with over  
CONTINUITY OF OPERATIONS PL

**The footer is set in Bell MT, 9 pt, Light Grey**

**The Title of the document is set in small caps, expanded by 1 pt.**

**SMALLER  
RULES**

Test, Training & Exercises  
**NOTIFICATION & ALERT**

Ampersands are set at 2pts smaller than the surrounding text so that they are not overbearing in size.

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Phase 1: **Activation & Relocation**

Instances of 'organized lists', the Heading has been set in Gotham Light and Gotham Medium, Document Grey, 9pt.

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# Reference Index

**Border is set on bottom**

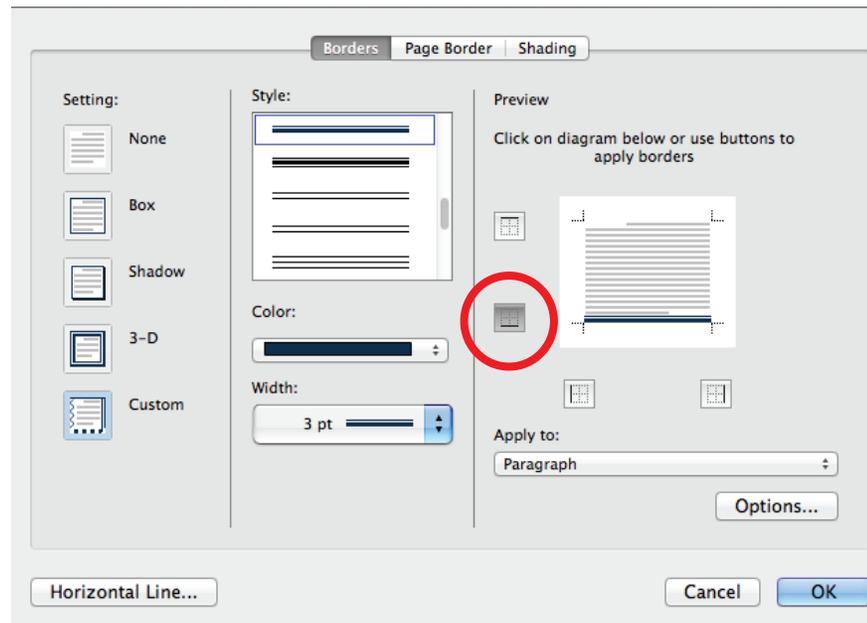
**Highlight the text you want to affect the border on.**

**Go to the menu 'Format' and drag down to 'Borders and Shading'**

**Select the style you want to set.**

**Select the color and the width.**

**If a style has already been selected as it is here, after you make your changes, click once on the 'Border Bottom' indicator (in red) to remove the current formatting, and then click it again to apply the new changes.:**



**Then hit OK.**

**I lost some moments trying to figure this one out ;)**

## Line Spacing is Set & Line Spacing before set at 12pt

This is crucial to formatting vertical space in Word.

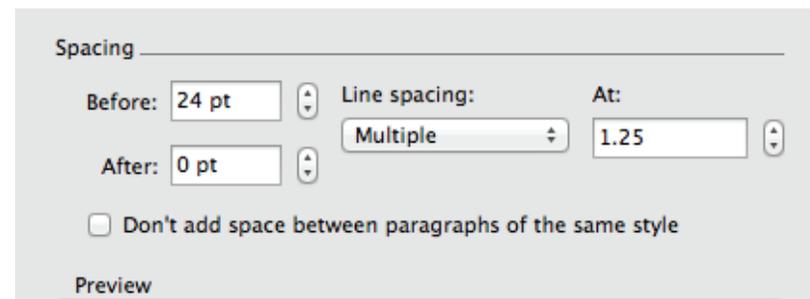
Highlight the text you want to modify.

Go to menu 'Format' and drag down to 'Paragraph'.

Line spacing is under the heading 'Spacing'.

There are three settings: Before, After, and Line Spacing.

Before increases the space before the text. After increases the space after.



Generally people stick to 'Single' Line Spacing or perhaps 'Double' for manuscripts.

If you set the 'Multiple' selection, you can do variants. This example shows 1.25, which is 1/4th of the way between single and double.

If you set it to 'Exactly' then you can specify a point value (in pt's).

**Default:** If a font is set in 12pt font and you set it in 'Single' line spacing, it would be approximately like setting the 'Exactly' setting to 13pt.

I like to base 'Exact' line-spacing 1-4 pts above or below the font itself.

## Small caps

**Small caps are not the same as regular caps made small!**

**In a well-created font, small caps have their own weight and sizing. They are an excellent way to vary your font-use instead of bold, italic, and other colors.**

**Full capital acronyms are an eye-draw. They hang you up as you read, making it difficult to follow what's between them.**

**A demonstration.**

[*Sample text:*] To implement the COOP plan, the agency has developed a **Concept of Operations (CONOPS)**, which describes its approach to implementing the COOP plan, and how each COOP plan element shall be addressed. In particular, this CONOPS focuses on establishing emergency decision-making authority and defining a decision process for determining appropriate actions in implementing COOP plans and procedures. This concept of operations also identifies the different classes of threat or hazard for which the plan is devised. Finally, the CONOPS identifies how the agency shall address issues associated with notification and alert, and command and control.

[*Sample text:*] To implement the COOP plan, the agency has developed a **Concept of Operations (CONOPS)**, which describes its approach to implementing the COOP plan, and how each COOP plan element shall be addressed. In particular, this CONOPS focuses on establishing emergency decision-making authority and defining a decision process for determining appropriate actions in implementing COOP plans and procedures. This concept of operations also identifies the different classes of threat or hazard for which the plan is devised. Finally, the CONOPS identifies how the agency shall address issues associated with notification and alert, and command and control.

**Using small caps weights the acronym equally to the text surrounding it.**

## Small caps

First, change the text you want to all lowercase, including the first letter.

Highlight the text.

Go to menu 'Format' and drag down to 'Font'

Under the 'Effects ' Heading is a check-box that allows you to select small caps.

## Set the Autoshape border

This is specifically in regard to your ‘callouts’.

There are two layers to the callout, a text box and the the frame.

The frame can be hard to grab with your mouse.

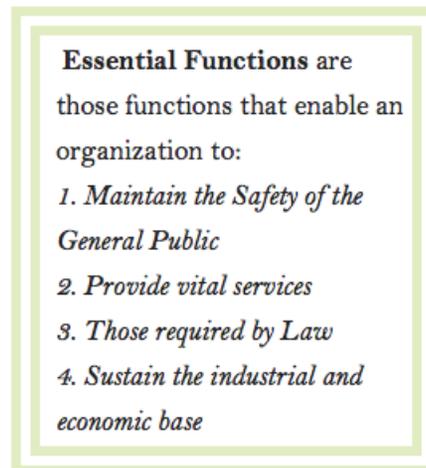
Move the text box with your arrow key and then selected the text box.

Select the Autoshape.

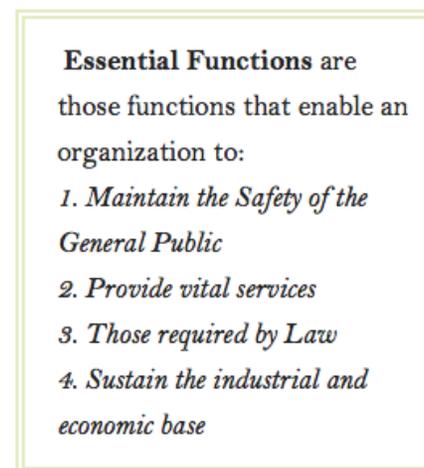
Go up to ‘Format’ and select ‘Autoshape’.

You can affect many items here. I prefer simple, clean uses of color. Especially on a document of many pages and possibly many printings—ink is a resource, both environmentally and monetarily.

Affecting ‘Weight’ will increases the breadth of the lines.



10pt weight



3pt weight

## Text is expanded by 4pt

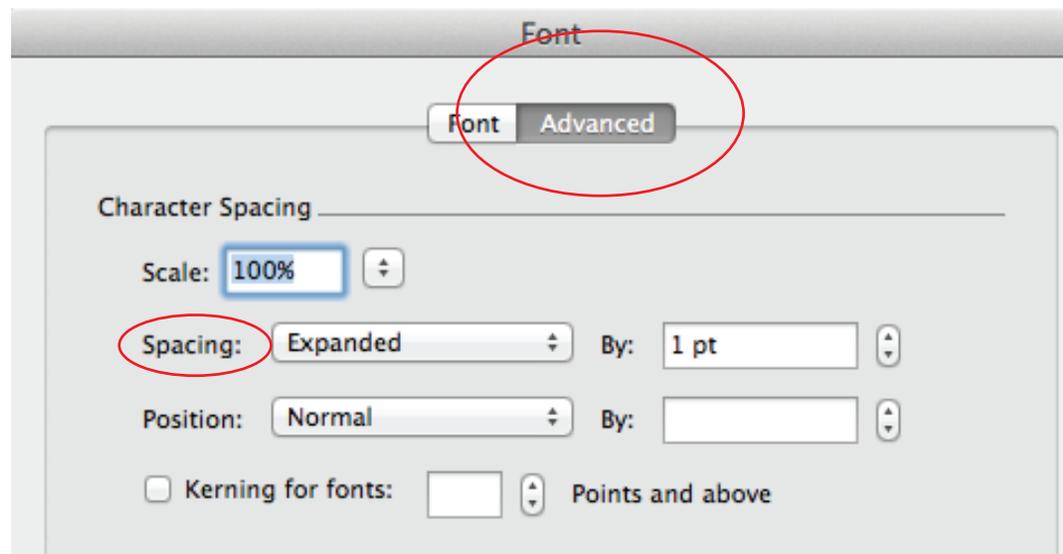
Expanding text is also called kerning.

Select the text you want expanded.

Go to the menu 'Format' and select 'Font' (or press Command-D on a Mac, Ctrl-D on a PC for a shortcut)

Select the 'Advanced' tab at the top of the Menu.

Set Spacing to either 'Expanded' if you want more space or 'Condensed' for tighter kerning.



The bullet itself is set in Light Grey

This is tricky.

Select your list.

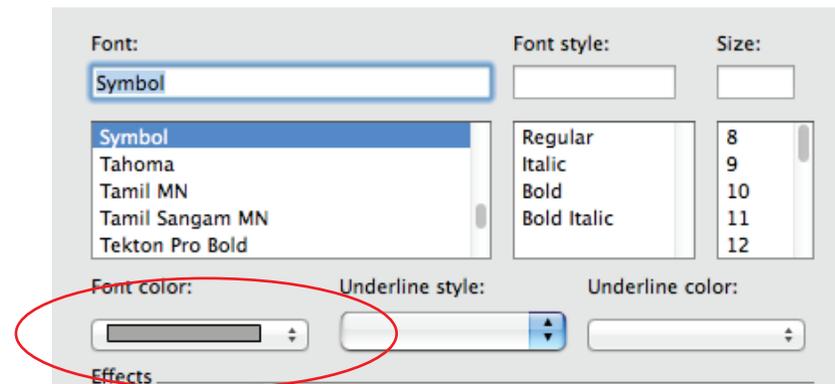
Go to the menu 'Format' and drag down to 'Bullets and Numbering'.

Select the option to 'Customize'.

Select 'Font', which is a button, it takes you to the normal Font menu.  
The font indicated will be 'Symbol'.

Below the font-list is an option for 'Font Color'.

If you change that color, it changes only the color of the bullet, and not the text in the list.



**Note:** I had it happen on several occasions that I went to change this and it screwed with my tabbing and alignment—set this first and then set the tabbing,

# Reference Index II

## Objects and Pictures

A note on maneuvering objects and pictures in Word.

You can drag them and you can select them and use your arrow keys to maneuver them, but sometimes it seems you can't get them in just the right place.

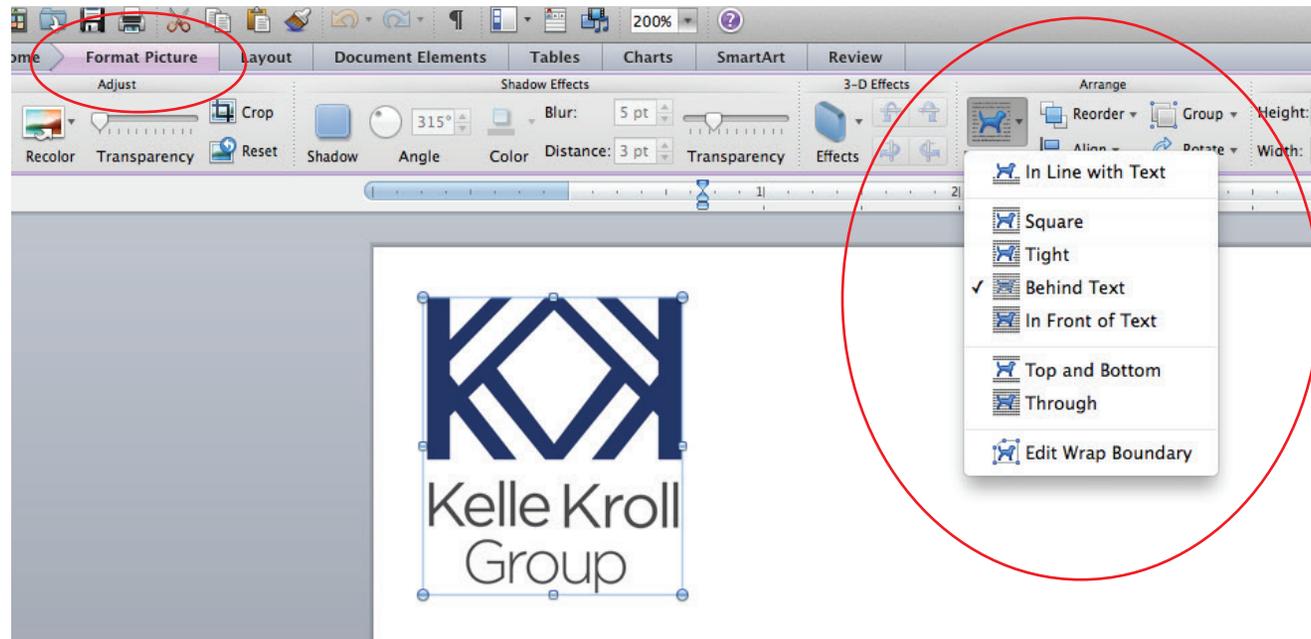
Holding Option (Mac) or Alt (PC) while you use your arrow keys allows you to 'bump' or move slightly the same object, 1 pixel at a time.

## Objects and Pictures

Additionally, a picture (or logo or AutoShape) by default is set to 'Wrap text'—the text floats around it without interfering with it.

This can be restricting.

If you go to your 'Format Picture' heading and select the Wrap Text icon, setting the image or shape to 'Behind Text' removes it from the text flow and allows you to put it exactly where you want.



## The 'Copy Formatting' tool

It can really be hard working on templates in Word, because it's hard to adjust small details across the breadth of the document.

Setting 'Styles' is one way to do this, but I find that styles can be too heavy handed.

If you select the text that is formatted how you want it and select the Copy Formatting tool (indicated in red), the next thing you highlight or select adopts the same formatting.

Even better, if you double-click the Copy Formatting tool, the tool will continue to work so you can select multiple things and have them adopt that formatting.

When you're done affecting all instances that you want changed, click the Copy Formatting paint brush once more, and it will be de-selected.



Hope all this helped and helps in the future.

If you have any design questions on why I did something or if I need to explain something further, please let me know.

I'm more than happy to.

Have a good one,  
ew