Creating and Formatting e-Books
Lesson 5
Next Steps in Formatting

Now that we've removed some of the document's elements, which aren't needed in most e-books, let's move on to the formatting process. At this point the document may include everything except a cover: the title page, copyright page, table of contents, content, and back matter. If the title page, copyright page, and table of contents haven't been created yet, wait until we have some of the formatting completed.

Even starting with an unformatted document, we should to go through these steps anyway to ensure that some formatting code hasn't been added that can cause problems later. I recommend not to using any templates for the manuscript, again errant code may be introduced. A plain Word DOC is all that is needed.

These instructions are for the Kindle because it is the format generally used by do-it-yourselfers. Some of the aggregators and distributors may have some slight variations in handling such things as table of contents. Be sure to check their style guides.

Clear formatting

If the manuscript is completely formatted with all of the paragraph indents, chapter titles, and page breaks, the next step may cause some cringing. All of the formatting needs to be cleared away. (Go, have a good cry, then return when you are ready.)

Word processors can insert hidden codes; all of those codes need to be stripped away. Clearing all the formatting is the best way to do that. When that's completed, a plain-vanilla document will be left, ready for re-formatting for e-book conversion.

As one writer said, "Creating an e-book is more than converting a document." I've come to the conclusion it is easier to start with an e-book, then format it for print rather than the other way around. Other writers like to start with the print book and then convert it to an e-book. Some of us may be starting with a manuscript that has been formatted for print, all of the formatting will need to be removed.

Getting rid of all those carefully placed tabs and chapter divisions is an easy process.

Hint: Highlight bold and italic text before removing the formatting. It will be easier to find when reformatting later.

Windows

1. Select the whole document by pressing CTRL+A or just select the portion of the document you wish to change.
2. Click the More button in the Styles portion of the Home tab. (It is just below the down arrow to the right of the styles.)
3. Click Clear Formatting on the menu that appears.

Mac

1. Select the entire document. Under the Edit menu, select "Select All" or use CMD+A
2. Go back to the Edit menu and select "Clear." In the fly-out menu, select "Clear Formatting."

Some writers have a little eraser in the home menu ribbon near the font format buttons. This eraser can be used in the place of the keyboard or drop-down menu items.

If the manuscript is double spaced, change it to single space now.

There, done!

Save this document with a new file name. I save my working file even before I make any changes so I don't accidentally overwrite my original file. I indicate this is my base document by designating with an easy-to-remember version number. I also create a new file each step of the way, so it's easy to go back and recover it if (when?) I make a mistake.

Formatting for Conversion

Changing Fonts

If the content text isn't in Times New Roman, now is the time to make that change.

1. Select the entire document.
2. From Font menu, scroll to Times New Roman in the dropdown menu, select it.

Done. Save again.

Page Breaks

Unlike print books, an e-book doesn't use blank pages between the chapters. Page breaks are needed between each page of the front matter and at the end each chapter. In my experience, I've found placing the page break after the last sentence of the last paragraph doesn't cause unsightly spaces between the chapters.

The process of clearing the formatting describe in the previous section does not remove the page breaks or blank pages.

Each version of Word has slightly different ways to access the page command.

The method below is the most universal.

1. Select Insert menu at the top of the screen.
2. Select Break in the drop-down menu.
3. Select Page Break in the fly-out menu.

Some page breaks may not be in a place that works well for the e-book. The only places for page breaks are at the end of each page of the front matter and at the end of each chapter. You can remove them.

1. Select the Show Non-printing Character button at the top of the screen. It looks like a backward P - ¶.
2. Go through the document, select "page break," and delete.

Chapter Titles

Whether chapter titles or just number designators are used, they need to be formatted correctly so a table of contents (TOC) is easier to build.

For this section, a little knowledge about styles is needed. For those who have not used Word styles, information from various websites is listed in references below. For those who understand the basics to apply styles, the tutorials can be skipped.

Chapter titles need to be in a style named Heading 1; it is a built-in style. This is one of the common styles located in the Styles box on the Home ribbon for both Windows and Mac.

1. Scroll through the Styles to find Heading 1.
2. Select the chapter title text.
3. Click on the Heading 1 style

 Or use keyboard command

CTRL + ALT + 1 (Windows)

CMD + OPT +1 (Mac)

NOTE: Heading 1 uses your default font in 16 pt. It can be changed by selecting Heading 1 in the styles list. Select "Modify" to make changes. Chapter titles can look any way desired, including alignment on the page. Again, I recommend sticking with a standard sans serif font, such as Arial or Helvetica.

Go through the document repeating steps 1 and 2 until all of the chapter titles have been formatted. The same style should be used for the back matter sections as well. We will build the table of contents after all of the formatting is completed.

Sub-titles

Whether to have sub-titles in the TOC is a matter of choice. If they are wanted in the TOC, follow the steps above only use Heading 2. Again, modifications of the Heading 2 style may be made.

Paragraphs

A general formatting rule is that non-fiction uses no indent and has space between paragraphs. While fiction uses paragraph indentation and no line spaces between paragraphs. Of course, this is an individual decision. Following general practices looks more professional.

If indents are used at the beginning of the paragraphs, you can do it easily with styles again.

1. Select all of the text in the section needing a paragraph indent. This is commonly between sub-heads.
2. From the styles menu, select "Body Text First Indent." The style can be changed to make the indent larger and remove spacing between the paragraphs. A .5 indent is common.

Don't use tabs or spaces to create indents. This can cause strange spacing in the various text sizes the reader may select.

When formatting block style paragraphs, don't use a hard return between paragraphs, rather set "paragraph spacing."

1. If hard returns is between paragraphs, they need to be removed. I found it easier to remove them a section at a time, rather than trying to do the whole document, before moving on to the next step.
   To find hard returns, show the format symbols (the little backward "P" - ¶ -in the home ribbon). A hard return will be an extra paragraph mark ¶ between paragraphs.
2. Select the section where you need to add line spacing.

Windows

3. Click on Page Layout.
4. Adjust the line spacing settings in the paragraph section

Mac

3. Select paragraph from the Format menu.
4. In the "Indent and Spacing" tab, in the spacing section set the "after" space to what space you desire. (This document uses 6 pt.) Set the line spacing to "Single."

This can be tedious. But once you get into a flow, it will move right along.

Now the Small Details

It's time to go back and put in the fine formatting details–bold, italic, block quotes, and such. Yes, once again it is a tedious process––one that makes you wonder whether it's worth going to all of trouble to remove formatting, if it's only going to put it back.

Yes, it is worth the trouble, to produce a quality product. It's amazing what might be hidden that can cause a problem during conversion. When reading an ebook that has extra space between paragraphs or odd symbols, someone hasn't gone to this kind of detail in creating the project. Quite honestly, if the changes aren't done now, we end up mucking through our document after conversion to try and find what is causing a problem.

Assignment

Complete the steps above in manuscript preparation. What difficulties did you have?

Refer to the "Simplified Formatting Guide" at KDP
https://kdp.amazon.com/help?topicId=A17W8UM0MMSQX6.

> Many writers only read this guide before uploading their file. Do you think the lack of detail here hinders quality Kindle products?

Read "Guide to Kindle Quality Content"
https://kdp.amazon.com/help?topicId=A1MMQ0JHRBEINX.

What do you think they miss?

References

Style Basics

http://office.microsoft.com/en-us/word-help/style-basics-in-word-HA010230882.aspx

How to Apply Microsoft Word Styles (tutorial)

http://www.word-tips.com/microsoft-word-styles.html

YouTube Tutorial

http://www.youtube.com/watch?v=_Xq_DVYxMOo