Chapter Eight
BASIC STEPS TO FORMATTING

I'm sure you've been wondering when I'll get down to business. For those who skipped right to this chapter, I urge you to at least skim the previous chapters or look at the Move Forward sections.

Now, let's start some essential steps. But a word or two before we begin:

- Don't make these changes for a PDF formatted e-book (PDF instructions are in the appendix), and
- Be sure to make a backup of the completed file.

No matter the distribution plan for a book, certain formatting steps that need to be taken to prepare the manuscript. We will start with the content because it's the heart of our e-book.

Let's begin

While each of us may have a favorite word processor, Microsoft Word has become a standard used for many applications. For example, Smashwords uses a Word DOC as the basis for their conversion process. Now other products have added components to make converting to an e-book easier. Adobe's InDesign and Apple's Pages have an EPUB format export feature. The popular writing program Scrivener also has a way to compile the various parts into an EPUB format. Kindle now accepts unzipped EPUB files for conversion to Kindle-friendly files. It's not one of the preferred methods and may result in converting problems. Most self-publishers upload a Word DOC file.

With that in mind, the instructions will be given for a Word document. The same formatting changes may be possible in OpenOffice or Pages, but the resulting document may not convert as expected. When using another word processor, be sure to save the file as a Word DOC file. (Some programs use "export" to make this conversion.)

Kindle Direct Publishing will accept a DOC or DOCX file. To save with other programs, follow the tips below.

- OpenOffice
  Use the Save As command and select one of the Microsoft Word file format.
- Pages from Apple
  Use the Export command in the File menu. Select Word then Save.

Kindle accepts PDF files. Textbook Creator and the new Kindle Create use PDF files to produce print replica or fixed layout e-books. More on this in Chapter 9. However, PDF files

Copyright 2018 Susan K. Stewart
Formatting e-Books for Writers
http://practicalinspirations.com/formatting-e-books-for-writers/
This work is licensed under a
Creative Commons Attribution-NonCommercial-NoDerivs 3.0 Unported License

cause issues with some of the standard Kindle conversion processes. In fact, before upload KDP has a warning screen advising using another file format.

If the manuscript is in PDF format, there a few options for the conversion. The first option uses Adobe Reader. The most recent version has an option to convert a file to a Word DOCX file. This option is available free for one use. After that a premium membership is required. The DOCX file can then be saved as a DOC file as described above.

Second is using Adobe Acrobat. Acrobat has an export function to convert PDF files to a DOC file. Select the Export command from the File menu and choose Word. It's very straightforward. If the PDF file has a lot of additional formatting such as page numbers, headers/footers, or sidebars, it may export with all of those features mingled with the general text.

A third option is an internet service **Nitro**. This service will convert various file formats including PDF to Word. A fourteen-day free trial is available.

When writing a manuscript exclusively for an e-book, using the techniques below from the beginning will save some time when it's time to publish.

Cleaning up

Now that we have a Word document, we can start cleaning it up for the conversion process. No matter which e-book format is being used, we need to start with a bare bones document. These steps are the beginning steps and are for a completely formatted manuscript. However, even if no special formatting has been done, some of the steps listed are needed to ensure a clean document. Steps such as removing sidebars or inserting graphics may not be needed for a fiction book. I encourage reading through this steps to be familiar with the entire process before beginning to format.

Let's start with the hardest first: throwing away some of the elements of the manuscript. Hint: Before beginning to make these changes, save the manuscript file with a new name. Accidents happen and it's nice to have the original file to return to.

1. Remove images

All images need to be removed. We'll discuss how to return the graphics and photos to the document in Chapter 9. For now, remove all graphics and photos. I recommend saving them to a separate folder. They'll be easier to find when it's time to add them back into the document.

2. Remove pull quotes

Pull quotes are usually added to long areas of text in a print book for the visual enhancement, something not needed in an e-book. If the quote is something to emphasize, use bold type in the text.

Copyright 2018 Susan K. Stewart
Formatting e-Books for Writers
http://practicalinspirations.com/formatting-e-books-for-writers/
This work is licensed under a
Creative Commons Attribution-NonCommercial-NoDerivs 3.0 Unported License

I read a book in which the pull quotes had been changed to italic text. A nice touch, but they landed in the middle of sentences. It took several pages for me to realize what was happening. I learned to skip the italic portions while reading. Again, not an easy reader experience. In many cases, pull quotes can be eliminated.

3. Remove sidebars

Sidebars are a different animal. They usually contain additional information, which enhances understanding of the content or have additional details to add clarity for the reader. The sidebars don't need to be completely jettisoned, though. If the information is important for the reader, consider other ways to handle it. One option is to incorporate the information into the text. Another option is to put the information in an appendix at the end of the document. A third way to include the sidebar is to make a graphic textbox, something we'll look at in Chapter 11 on graphics. Don't throw the material away. Cut and paste it into another document to use later.

4. Remove page numbers

I've already mentioned page numbers aren't necessary, so remove them. This can take some time. If the document is divided into formatting sections, the page numbers will need to be removed from each section.

Windows: The **Header/Footer** menu is found in the **Insert** box on the Home Ribbon.

Mac: The **Header/Footer** menu is under the **View** drop-down menu.

In both operating systems, double clicking on the header or footer in the document will open it for editing.

- Open **Headers/Footers** menu.
- Click on the page number and a box will appear around it.
- Delete the number.

All the page numbers in each formatting section will be deleted. (View the nonprinting characters, the backward P in the toolbar, to show the formatting sections.)

Go through the document following these steps until all of the page numbers are removed.

5. Move footnotes

Now it's time to work with the footnotes. If the footnotes are at the bottom of the pages, they will need to be moved. They can either be put at the end of each chapter (my preference) or at the end of the book. At this point, it's a matter of copying and pasting them to another page in the document. Don't change the reference numbers in the document yet.

If Word's footnote toolbars has been used to create them, **Convert Footnotes to Endnotes** option can be used.

Copyright 2018 Susan K. Stewart
Formatting e-Books for Writers
http://practicalinspirations.com/formatting-e-books-for-writers/
This work is licensed under a
Creative Commons Attribution-NonCommercial-NoDerivs 3.0 Unported License

Once the footnotes have been cleaned up, it's time to remove all other details from the headers and footers. These should be empty throughout the document. Like page numbers, it may be necessary to go through the various formatting sections to remove all the header/footer text.

6. Remove the cover photo.
7. Remove blank pages.
8. Remove all formatting.

If the manuscript is completely formatted with all the paragraph indents, chapter titles, and page breaks, this step often makes us cringe. All of that formatting needs to be cleared away. (Go, have a good cry; return when you are ready.) As one writer said, creating an e-book is more than converting a document.

I recommend doing this step with an "unformatted" document as well. Word processors can insert hidden codes; all of those codes need to be stripped away. This is the best way to clear all the formatting. When finished, we are left with a plain vanilla document ready for re-formatting for e-book conversion.

If the manuscript has italics, bold, or other such styles, I recommend highlighting these so they can be easily found later. The clear formatting command doesn't remove the highlights.

<u>Windows</u>

- Select the whole document by pressing **CTRL+A** or just select the portion of the document that needs changed.
- Click the **More** button in the **Styles** portion of the Home tab. (It is located just below the down arrow to the right of the styles.)
- Click **Clear Formatting** on the menu that appears.

<u>Mac</u>

- Select the entire document. Under the **Edit** menu, select **Select All**.
- Go back to the **Edit** menu and select **Clear**. In the fly-out menu, select **Clear Formatting**.

9. If the manuscript is double spaced, change it to single space.
10. A bare bones text document is left. Make a backup of this version.

Hidden Format Code

A manuscript exported from another format may have other hidden formatting code. In this case, after completing the steps above the "nuclear option" may be needed.

Copyright 2018 Susan K. Stewart
Formatting e-Books for Writers
http://practicalinspirations.com/formatting-e-books-for-writers/
This work is licensed under a
Creative Commons Attribution-NonCommercial-NoDerivs 3.0 Unported License

- To do this, copy and paste the entire document into a text editor such as Notepad (Win) or TextEdit (Mac).
- Now **save the document as a TXT file**. A warning may be given that formatting will be lost.
- Go ahead and **click OK** because this is a time to lose the formatting. This method creates a completely clean file to begin the conversion process. Note: highlights for italic or other styles don't remain in a TXT file. There is no way to keep track of this with the nuclear option.

Catherine Ryan Howard, author of *Distress Signals*, put it this way:

> I had to go through my book again but, while I did, I was able to pick out a few more errors, clean up a few sentences and generally improve it a bit. So instead of thinking of it as formatting, I just thought of it as another go-through, another revision.[1]

Basic starting steps

Now we have a clean manuscript document. We can start putting back some of what has been removed. It's natural to be thinking, "Why did I remove it only to start over?" When formatting an e-book, remember "simple" is the keyword. Yes, there are fancy e-books available. These are the coffee table books of the e-book industry. We are preparing to publish a book people want to read, not admire.

Change Fonts

When the format was cleared, especially with the nuclear option, the font may have changed to the word processor's default font. The current font is displayed on the Home Menu Ribbon. As discussed in Chapter 7, Times New Roman is generally recommended for the text and Arial for chapter titles and subheads. 12 pt is the standard font size for an e-book. Other simple serif fonts, such as Cambria or Century Schoolbook, may be used also.

Follow the two steps below to change fonts.

1. Select the entire document. (Use either **CTRL+A** (Win), **CMD+A** (Mac) or **Select All** from the **Edit** menu.)
2. From **Font** menu, scroll to Times New Roman in the drop-down menu, select it. 12 pt is the recommended size for e-books.

Done.

Sidebars

If sidebars have been removed, now is the time to decide what to do with the information. This decision may result in some rewriting of the manuscript.

Copyright 2018 Susan K. Stewart
Formatting e-Books for Writers
http://practicalinspirations.com/formatting-e-books-for-writers/
This work is licensed under a
Creative Commons Attribution-NonCommercial-NoDerivs 3.0 Unported License

In addition to the options discussed earlier, some writers place their sidebar material between two horizontal lines in the flowing text. Like this:

While this can separate the extra information from the main document, most people won't skip it. They will continue reading as though it's part of the text. A title of the section may help. If using this method, be sure to make a good transition for the readers who simply keep reading.

For readers using large fonts, this method may result in confusion when the material shows up on another page. Don't forget, the good reader experience makes a good e-book.

A simple horizontal separator can be made by typing three symbols, such as underscores, dashes, or asterisks, then hit enter, as below:

Another method is to type the simple symbol and center it:

###

A custom horizontal line can be used. This is how

- Start by selecting **Borders and Shading** from the **Format** drop-down menu.
- Click on **Horizontal Line**. Navigate to the horizontal line file. Click **Insert**.
  Know beforehand where the picture or design is located on the hard drive.

Don't use a paragraph border because it won't change well during document conversion. Be aware, a large or detailed horizontal line image may not convert well.

The final, and hardest, option is to include the sidebar in the same area of the chapter in the form of a graphic text box. The reason I say this is the hardest is because the sidebar needs to be re-created as a graphic. The text box graphic then is inserted as any other graphic will be (see Chapter 11 for details about text boxes).

Copyright 2018 Susan K. Stewart
Formatting e-Books for Writers
http://practicalinspirations.com/formatting-e-books-for-writers/
This work is licensed under a
Creative Commons Attribution-NonCommercial-NoDerivs 3.0 Unported License

A Sidebar as a Textbox

The information you provide in a sidebar can be put in a textbox.

One problem with a textbox is the font is not scalable. In other words, it won't become larger or smaller as the user adjusts his settings. If the user attempts to enlarge the box to increase the font size, the text may become fuzzy.

The placement of the sidebar may interfere with the smooth flow of reading. This kind of interruption may be a negative experience for the reader.

Now we're ready to start more detailed formatting.

Copyright 2018 Susan K. Stewart
Formatting e-Books for Writers
http://practicalinspirations.com/formatting-e-books-for-writers/
This work is licensed under a
Creative Commons Attribution-NonCommercial-NoDerivs 3.0 Unported License

Move forward

Check each item as you complete it.

- MAKE A BACKUP COPY OF YOUR FILE. (Yes, it's important enough to warrant upper case letters.)
- Remove graphics. Save them to another folder first.
- Remove pull quotes.
- Remove sidebars. Save the material in another document with a different file name in another file folder.
- Remove page numbers.
- Move footnotes to the end of each chapter or the end of the book.
- Remove cover image.
- Clear formatting.
- If needed, use the nuclear option to clear unseen code.
- Change fonts.
- If not already completed, re-write sidebars.

Now we're all set to start preparing those manuscripts for e-publishing.

Copyright 2018 Susan K. Stewart
Formatting e-Books for Writers
http://practicalinspirations.com/formatting-e-books-for-writers/
This work is licensed under a
Creative Commons Attribution-NonCommercial-NoDerivs 3.0 Unported License

Endnotes

1. Howard, Catherine Ryan, 2011, "Backpacked Weekend: A new and easier way to format your e-book," September 5, 2011, accessed November 8, 2014, http://catherineryanhoward.com/2011/09/05/backpacked-week-a-new-and-improved-even-easier-way-to-format-your-e-book/

Copyright 2018 Susan K. Stewart
Formatting e-Books for Writers
http://practicalinspirations.com/formatting-e-books-for-writers/
This work is licensed under a
Creative Commons Attribution-NonCommercial-NoDerivs 3.0 Unported License