



A BiblioYou Tutorial

Formatting of a simple text-based print book, from start to finish

There are many ways to format a book for publication. This tutorial works through a basic formatting of a simple Microsoft Word based book. Once these techniques are learned, there are many simple steps that can be added to “spice up” the design of the book. It is best to follow this step-by-step tutorial with your book file open, repeating the steps outlined on the book you are preparing.

*Note that this reformat is being done in Microsoft Word 2007. The window may look different versions of Word. Word’s formatting preference selections in this document are underlined. These are items that may look different or that may be found in a different placement on other versions of Word. Often these selections are also found in drop down menus at the top of a Word window.

Remember, BiblioYou offers a list of publishing professionals that can help prepare your book. Need Help? ([Click Here](#))

1. Open your text-based file in Microsoft Word. This file is formatted at 8 ½” x 11”. We will be reformatting it to a small paperback size of 5 ½” x 8 ½”. The book can be formatted to most any size at this point, but it is very important that the size is adjusted before any further formatting. Figure 1 shows the initial format for this book.

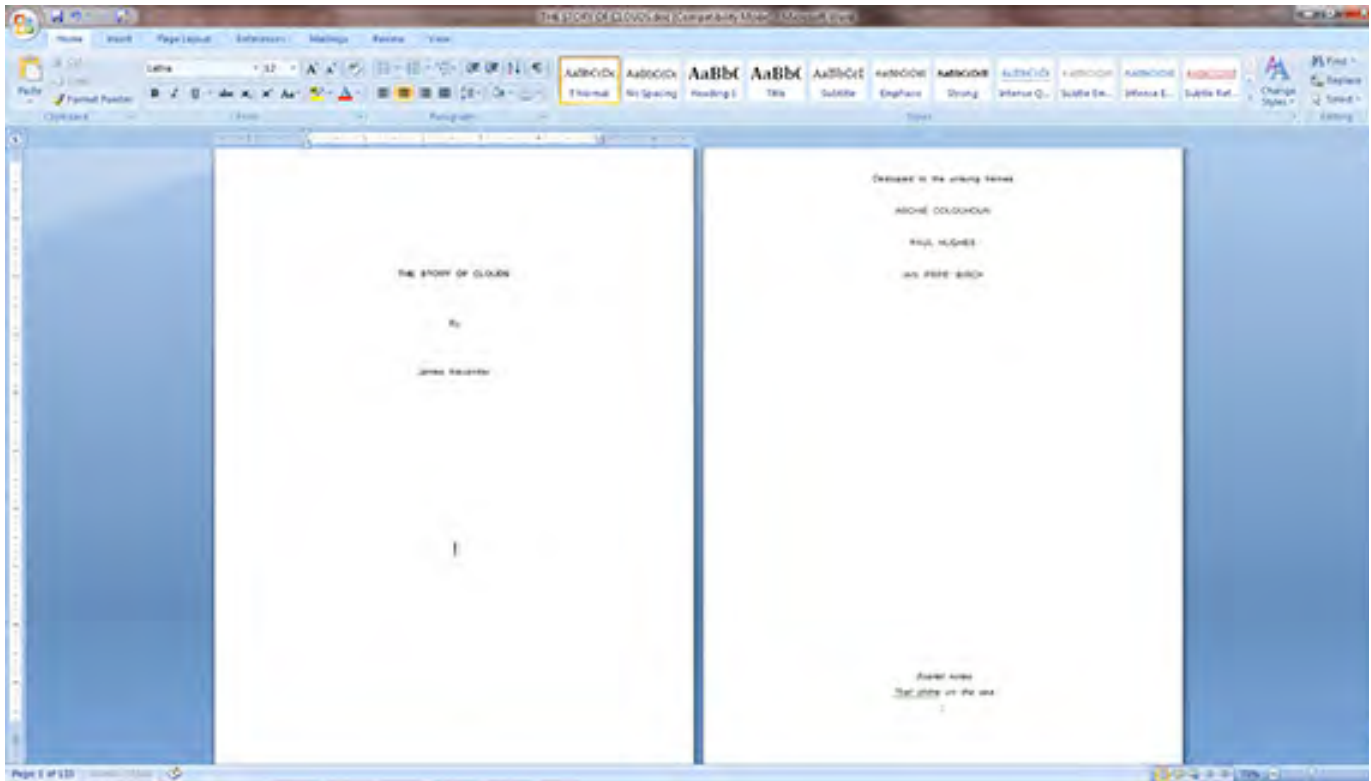


Figure 1

2. Choose the Page Layout tab, then click on the bottom right corner of the Page Setup section of the tools panel. (Figure 2)

*(Note that this selection is also available as a drop down from File at the top of the window. When using different versions of Word, this may be the only place such selections would be available)

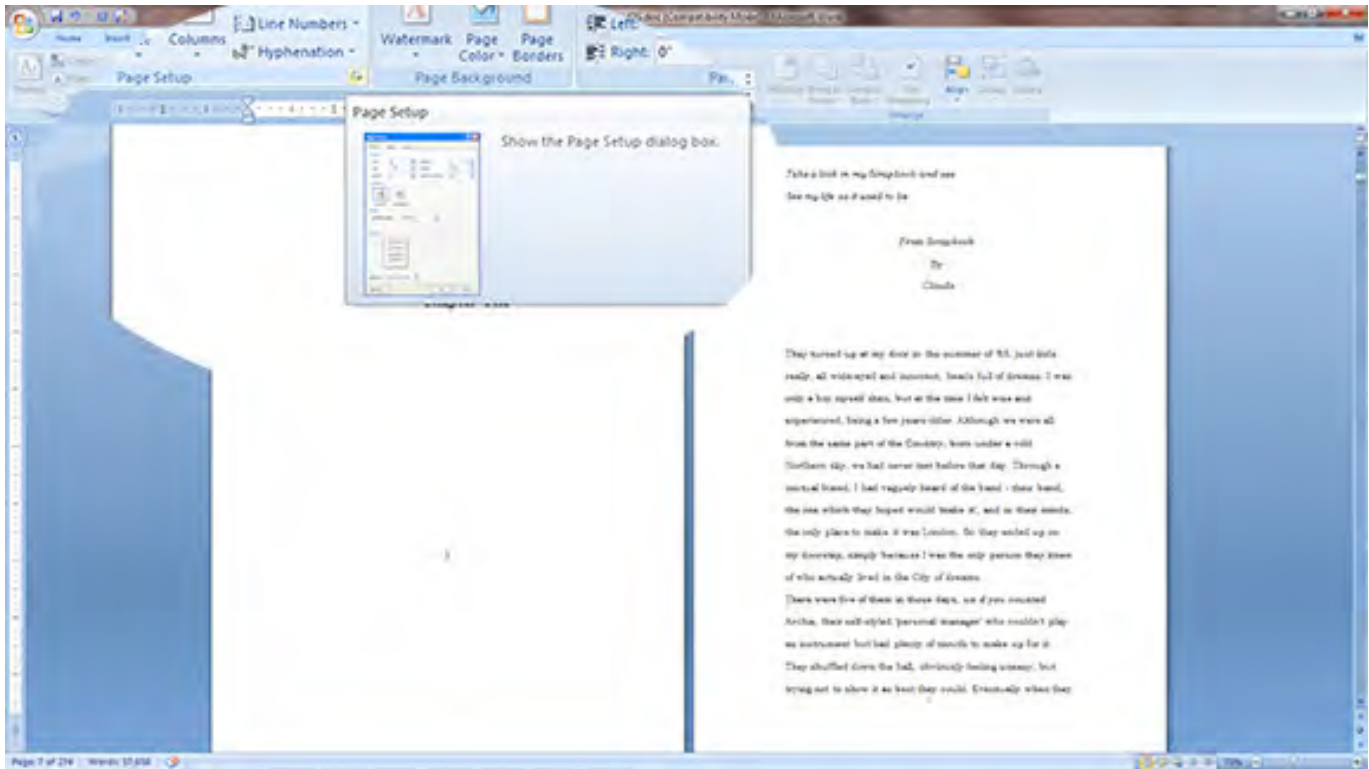


Figure 2

3. The Page Setup window will open (Figure 3)

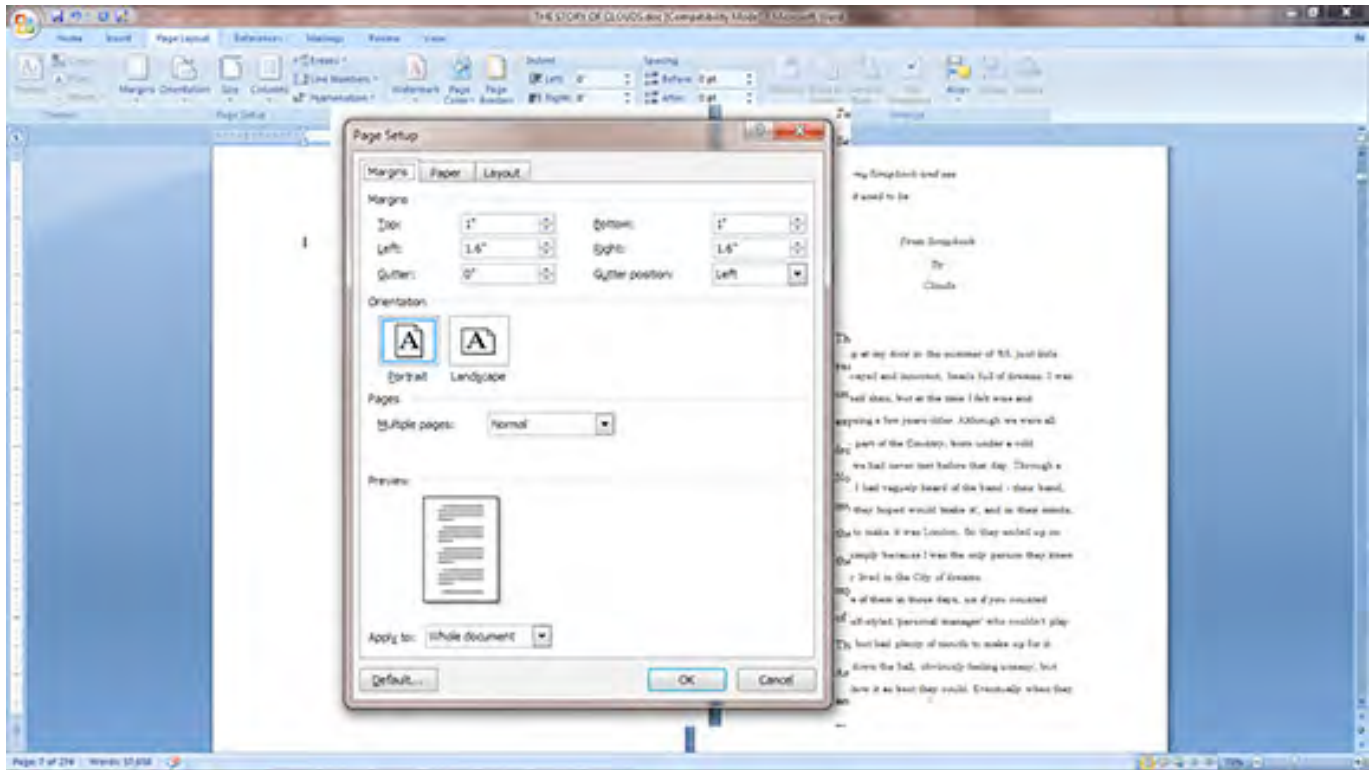


Figure 3

4. On the Margins tab, set the Top & Bottom margins to .8” and the Left and Right margins to .7”. Make sure Whole Document is set at bottom.

(Figure 4)

(These can be set to any value according to preference)

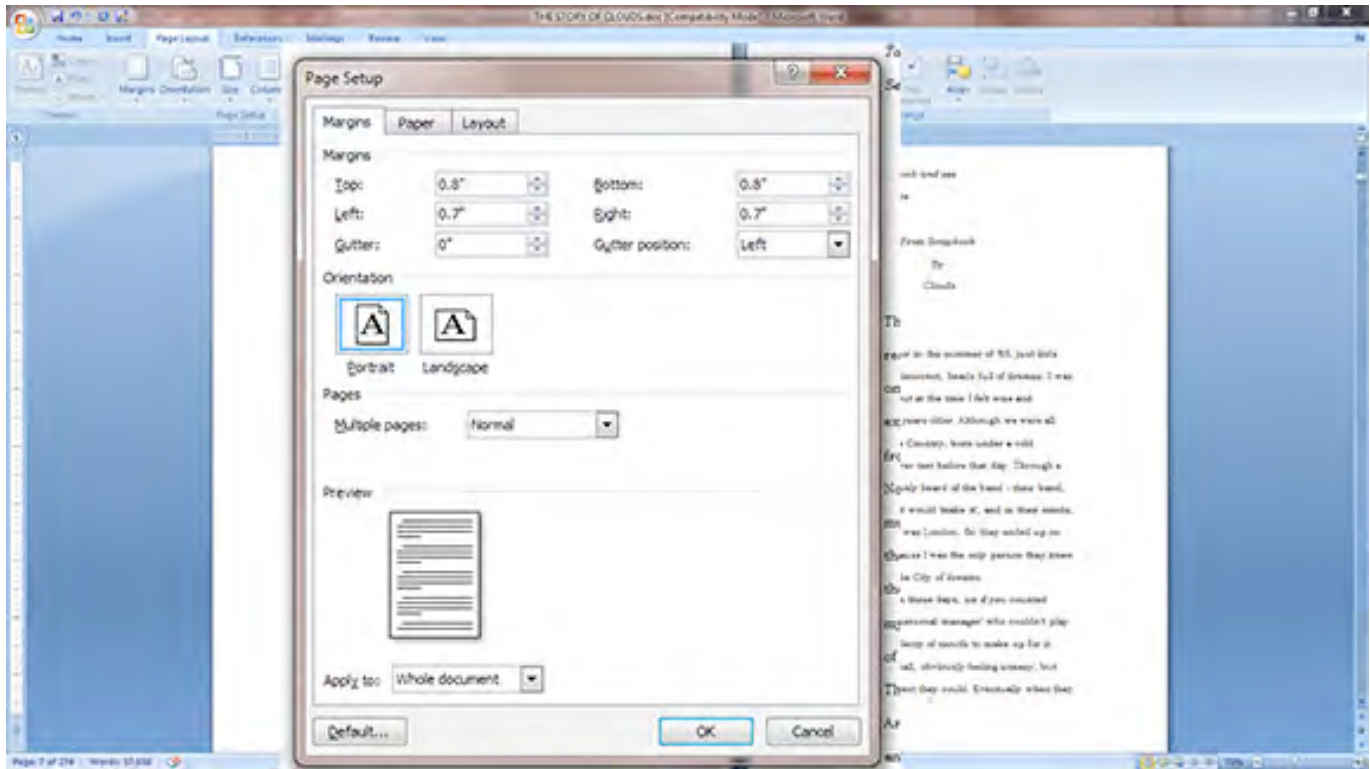


Figure 4

5. Click on the Page tab (Figure 5).

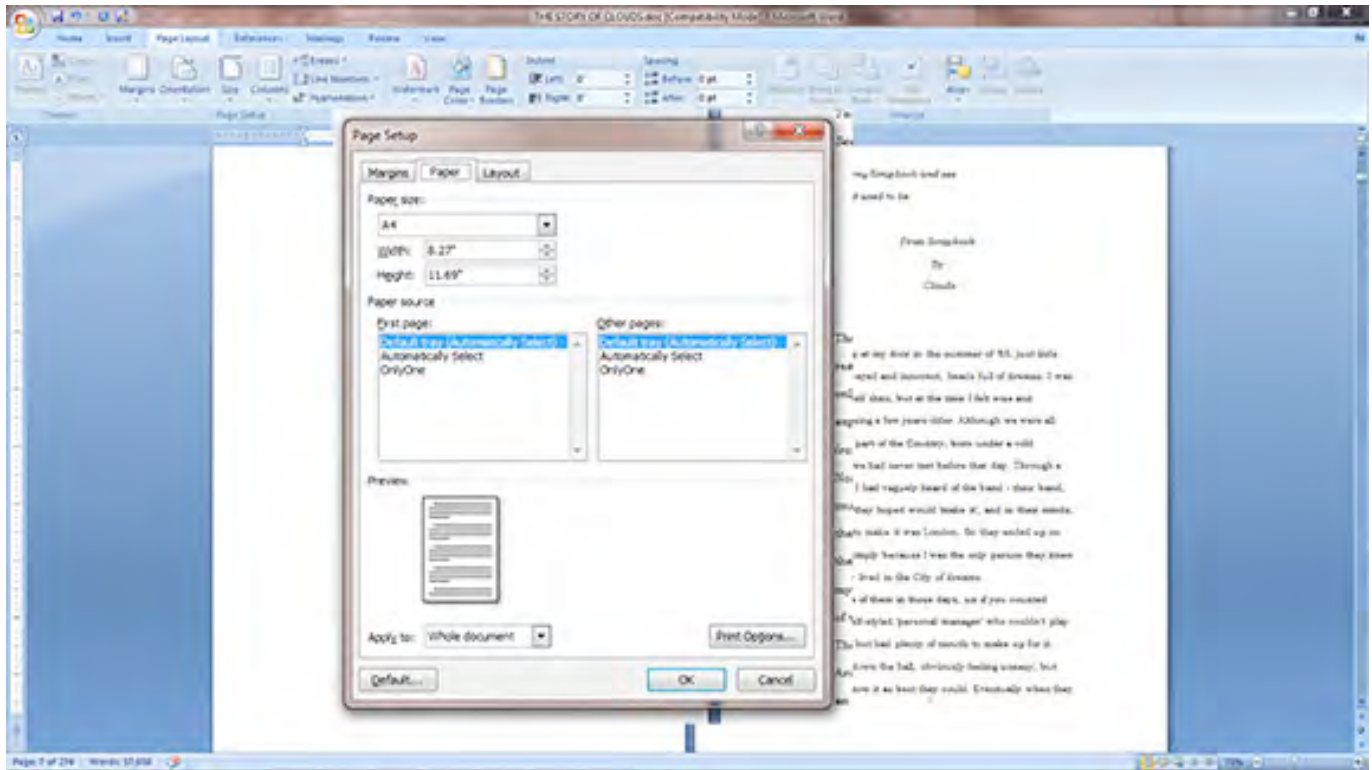


Figure 5

6. Set the Page Size to Half Letter, or Width of 5.5” and Height of 8.5”. Make sure Whole Document is set at bottom. (Figure 6)

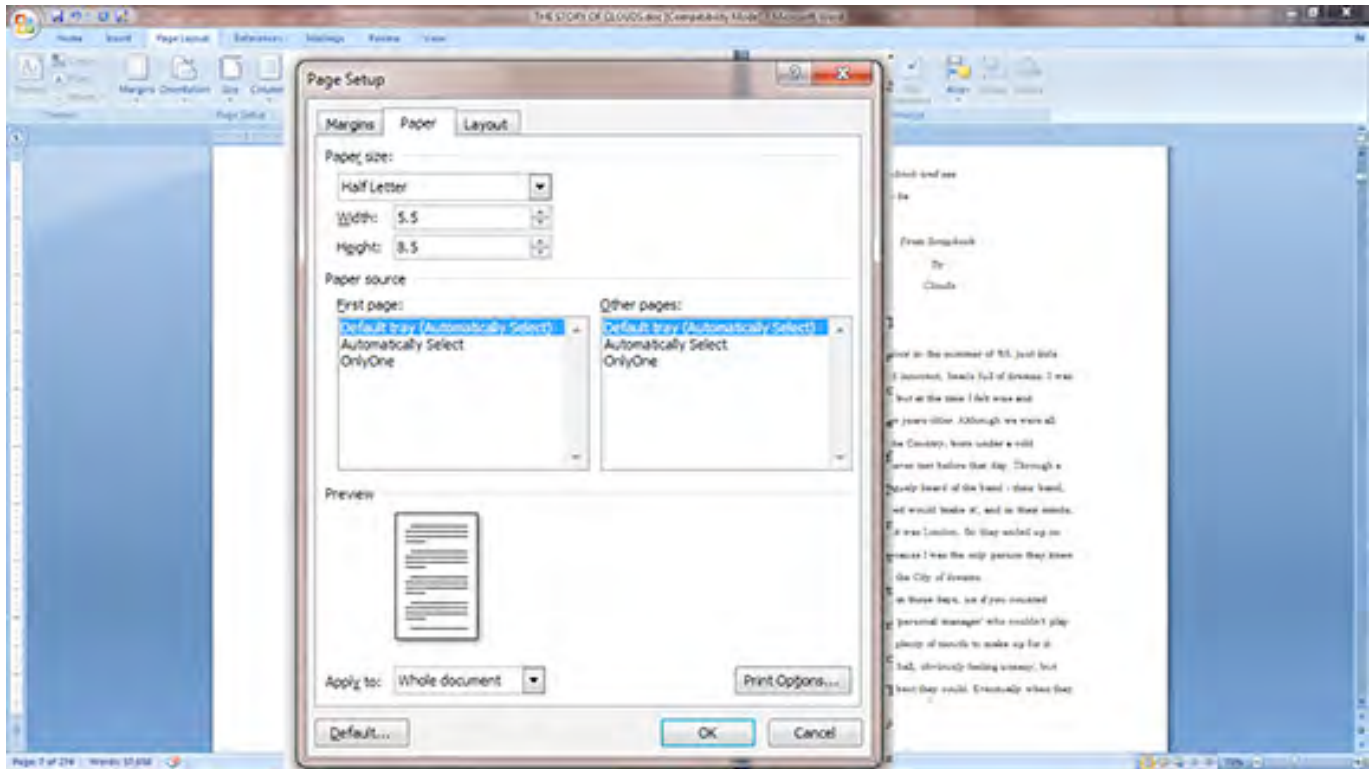


Figure 6

7. Click on Layout Tab. (Figure 7)

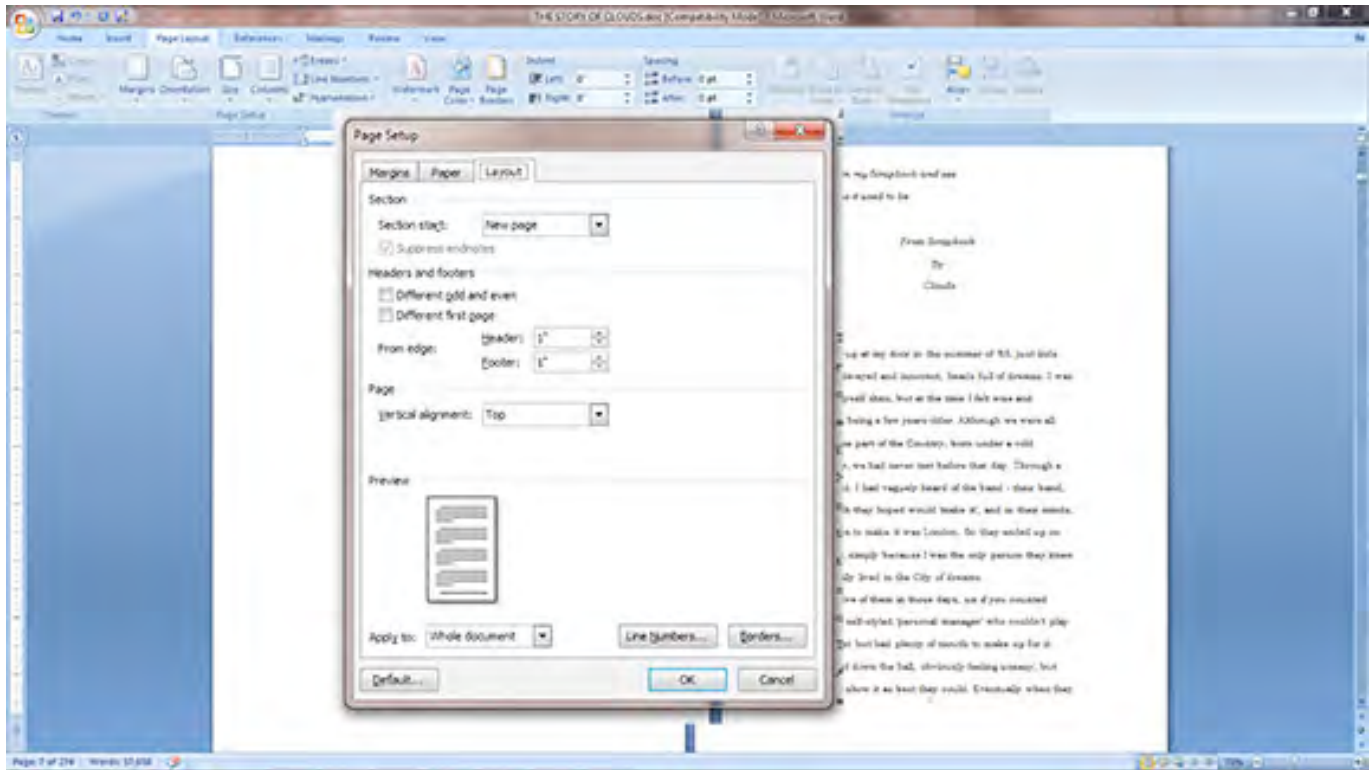


Figure 7

8. Make sure the Different odd and even, and the Different first page boxes are checked. Make sure the Header and Footer are set at .5", and the Vertical alignment is set to Top. Make sure Whole Document is set at bottom. Click the OK button. (Figure 8)

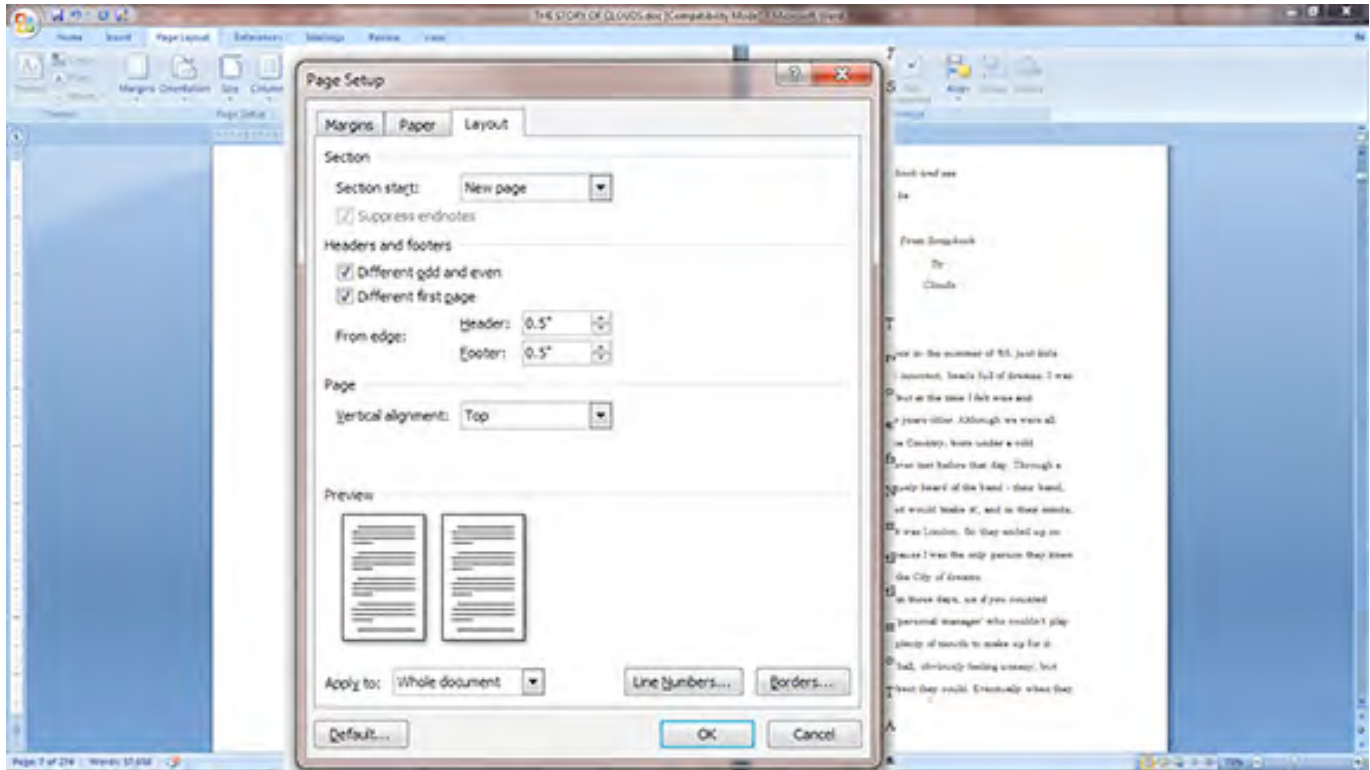


Figure 8

9. You will see that the page is now formatted to the new size. Notice that the lines are double-spaced. We want to set the spacing to single spaced, like most commercial books. (Figure 8)

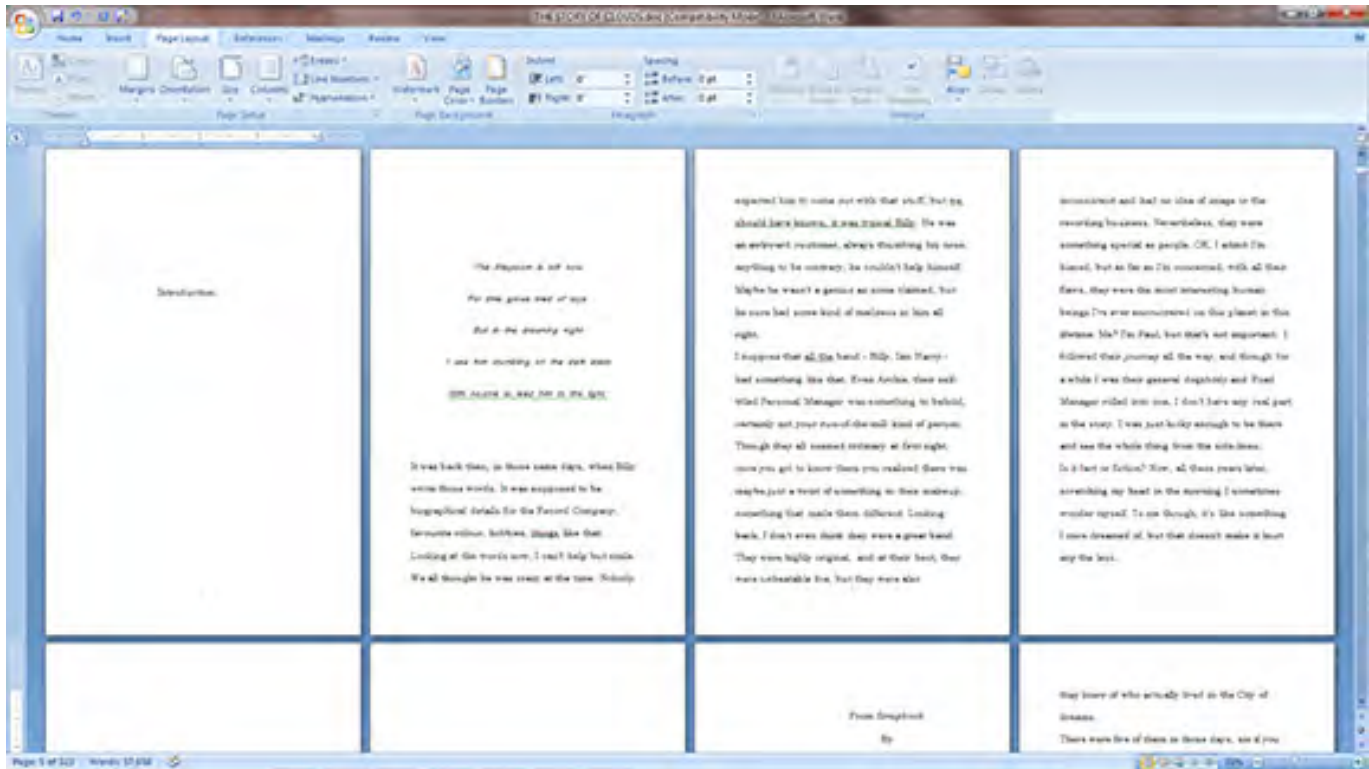


Figure 8

10. First select all of the text in the window. Select it all with keyboard stroke Command + A in Mac, or Control + A on a PC (also available under Edit dropdown). Then Right Click anywhere on the selected text, drop down to Paragraph and click. (Figure 9)

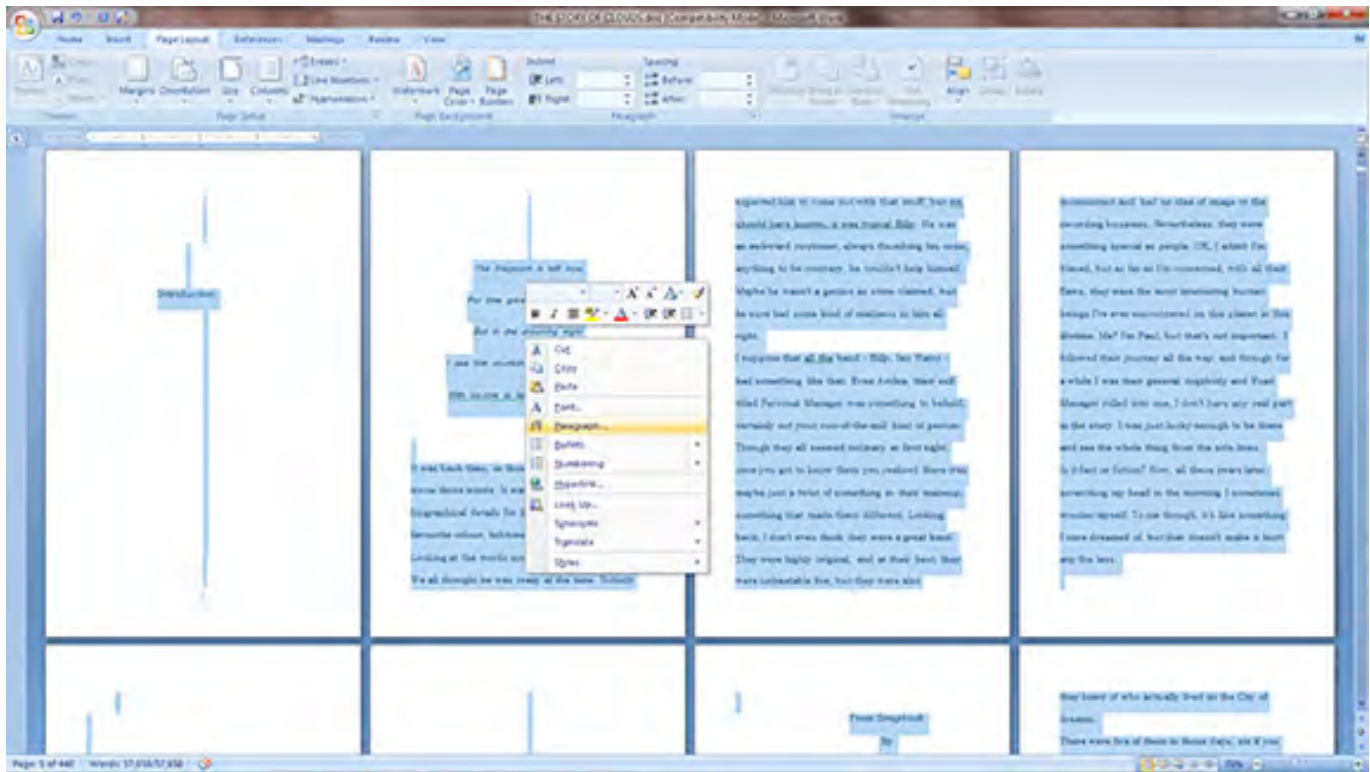


Figure 9

11. The Paragraph widow will open. (Figure 10)

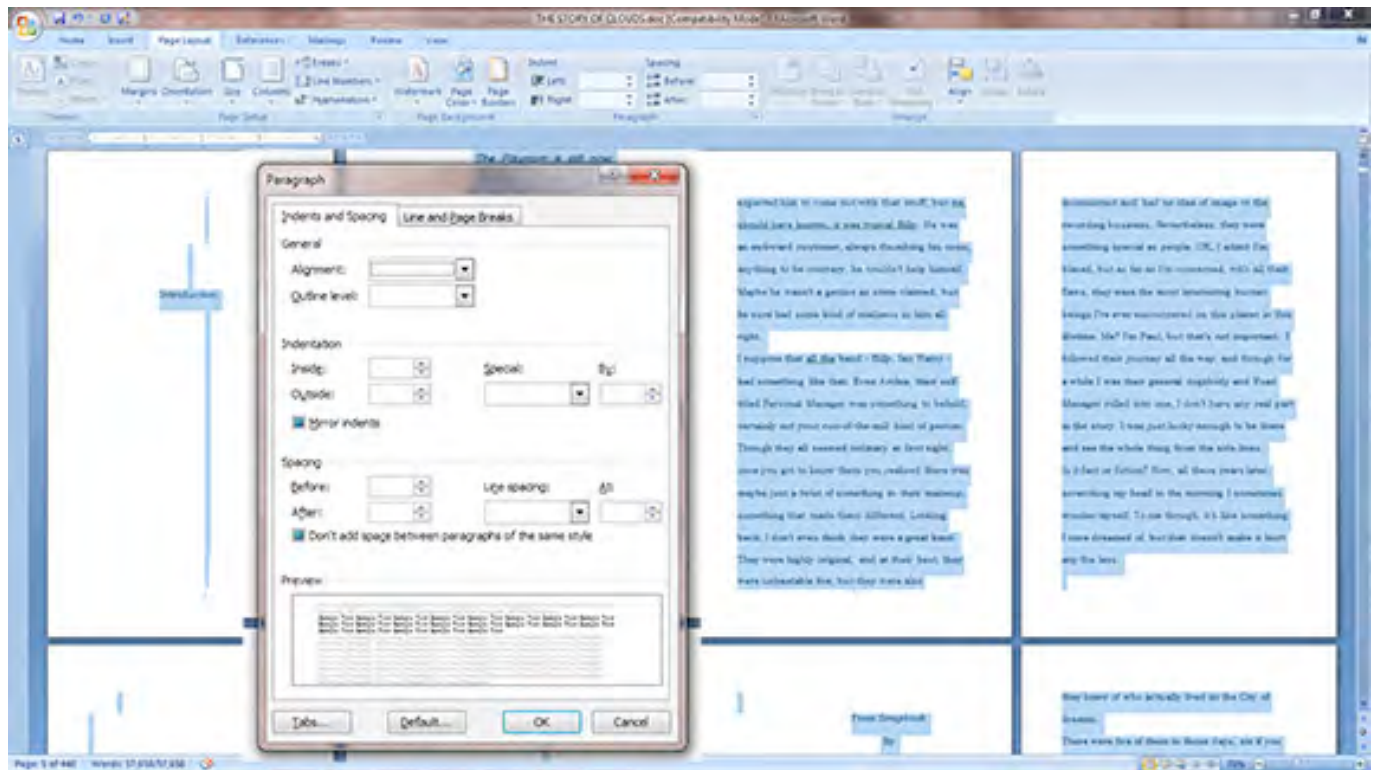


Figure 10

12. To set up your book with “Block” paragraph formatting, in the Indents and Spacing tab, set Left and Right Indentation to 0”, Set Special to (none), set Spacing for Before as 0pt, After as 10pt (Or whatever you’d like), and Line spacing as Single. (Figure 11)

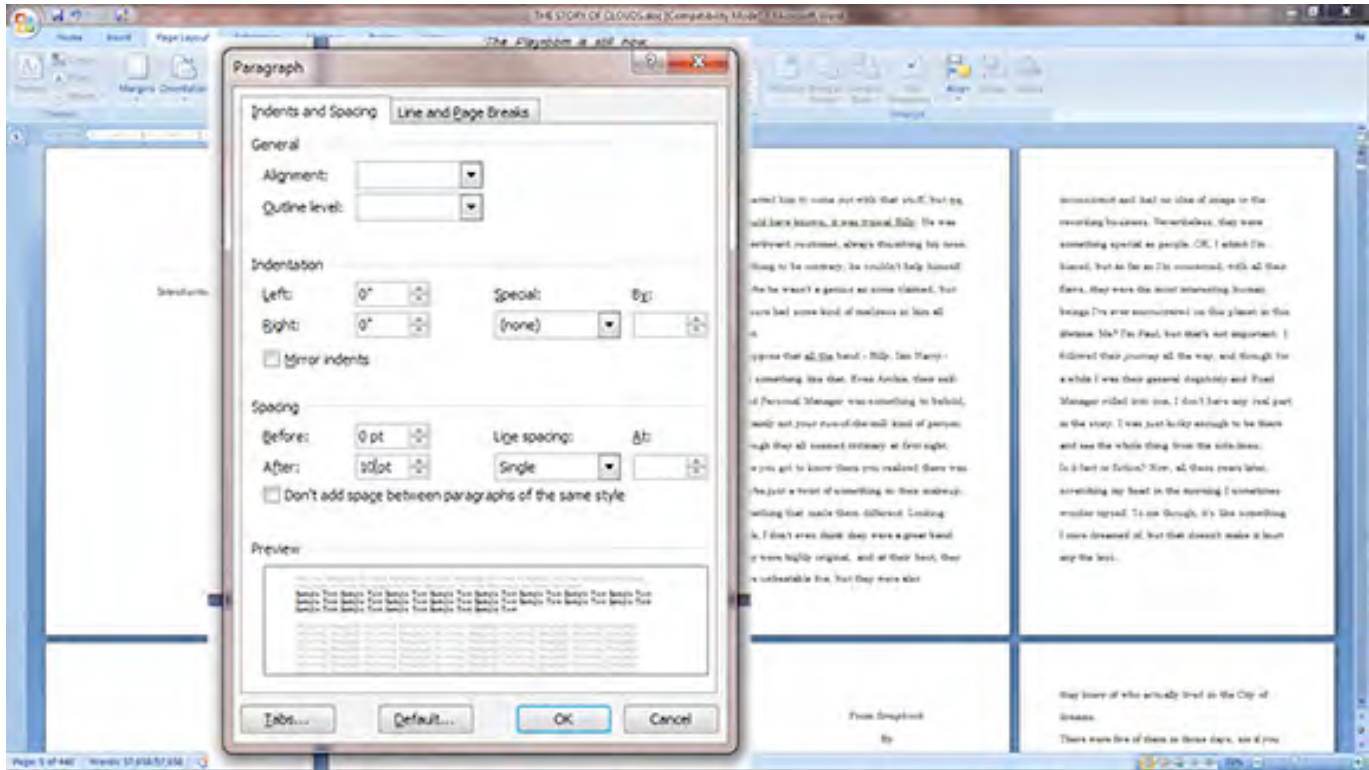


Figure 11

13. To set up your book with “Indented” paragraph formatting, in the Indents and Spacing tab, set Left and Right Indentation to 0”, Set Special to First Line, set By to .3”, set Spacing for Before as 0pt, After as 0pt, and Line spacing as Single. (Figure 12)

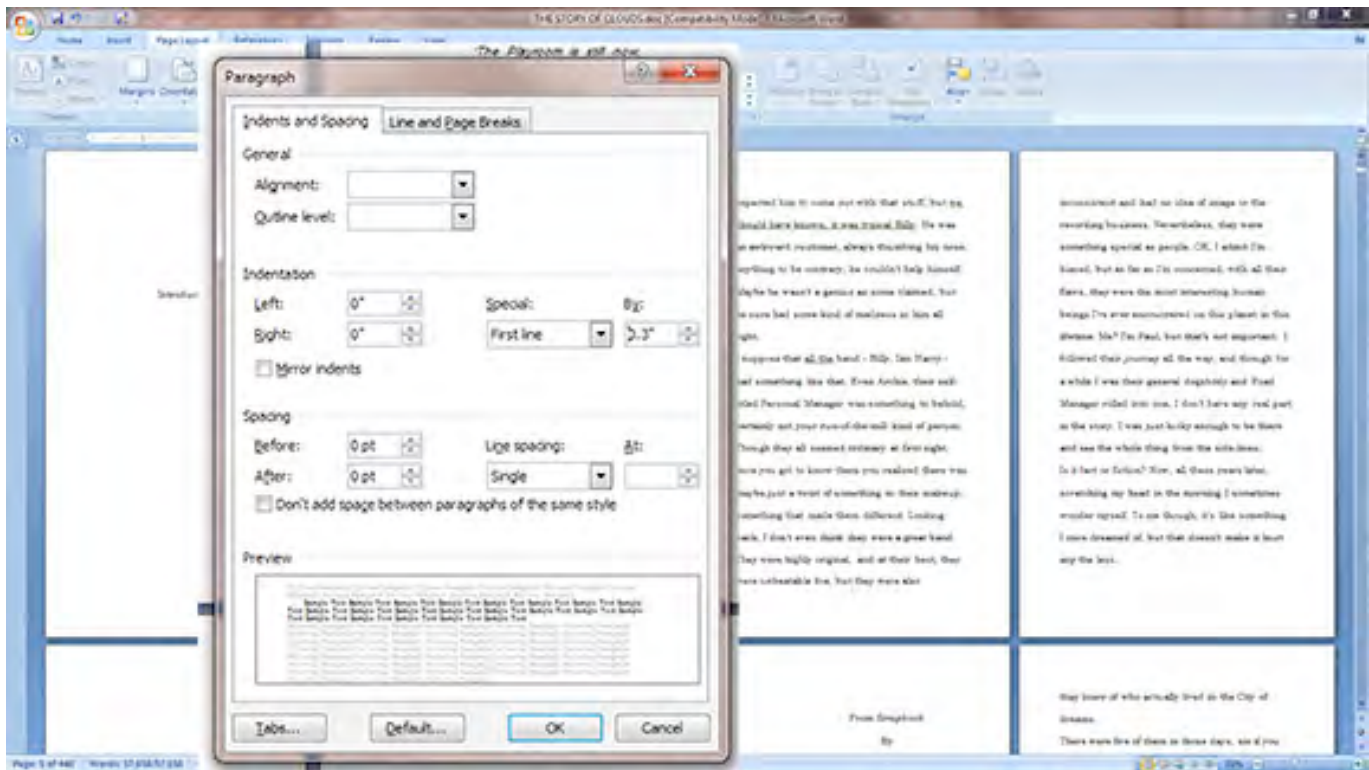


Figure 12

14. Now click on the Line and Page Breaks tab (Figure 13)

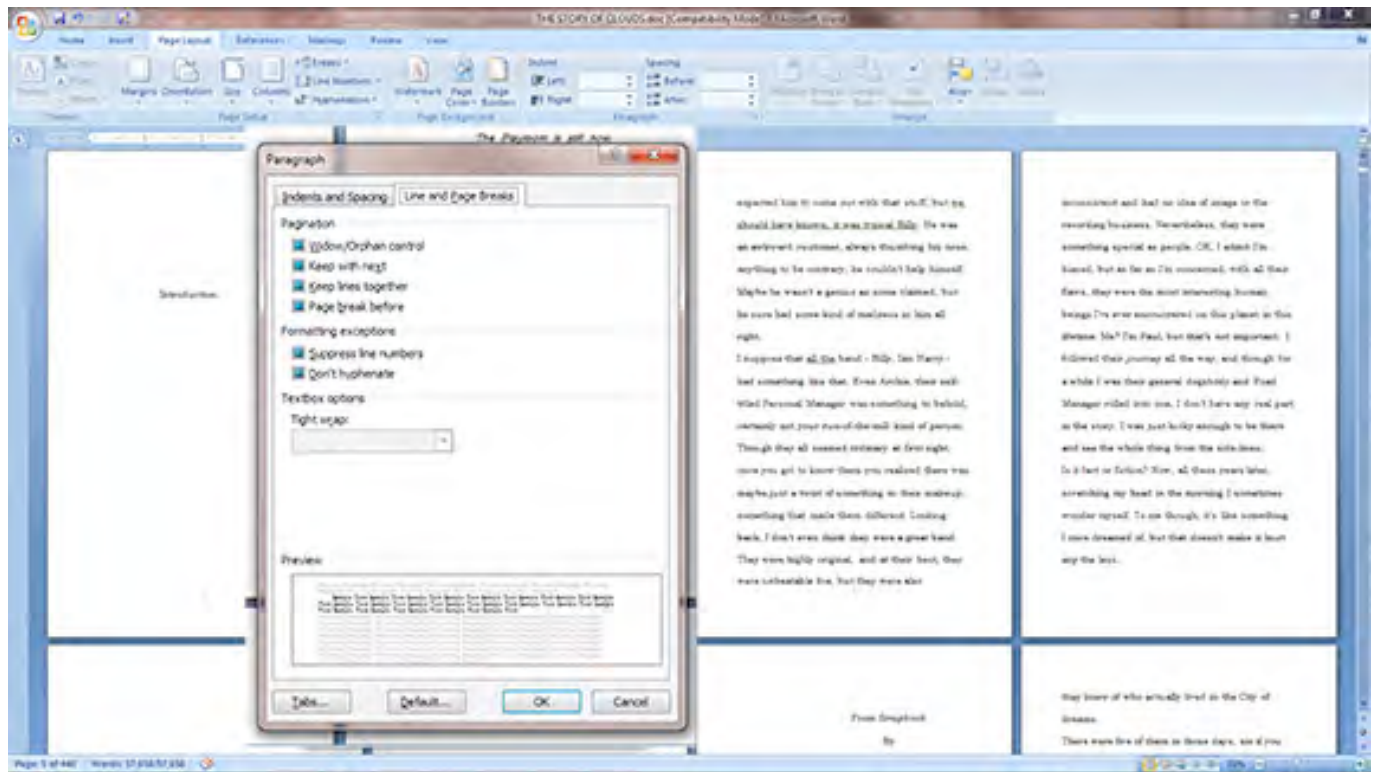


Figure 13

15. Make sure Window/Orphan control, and Don't hyphenate are checked, and all other boxes are unchecked (Figure 14)

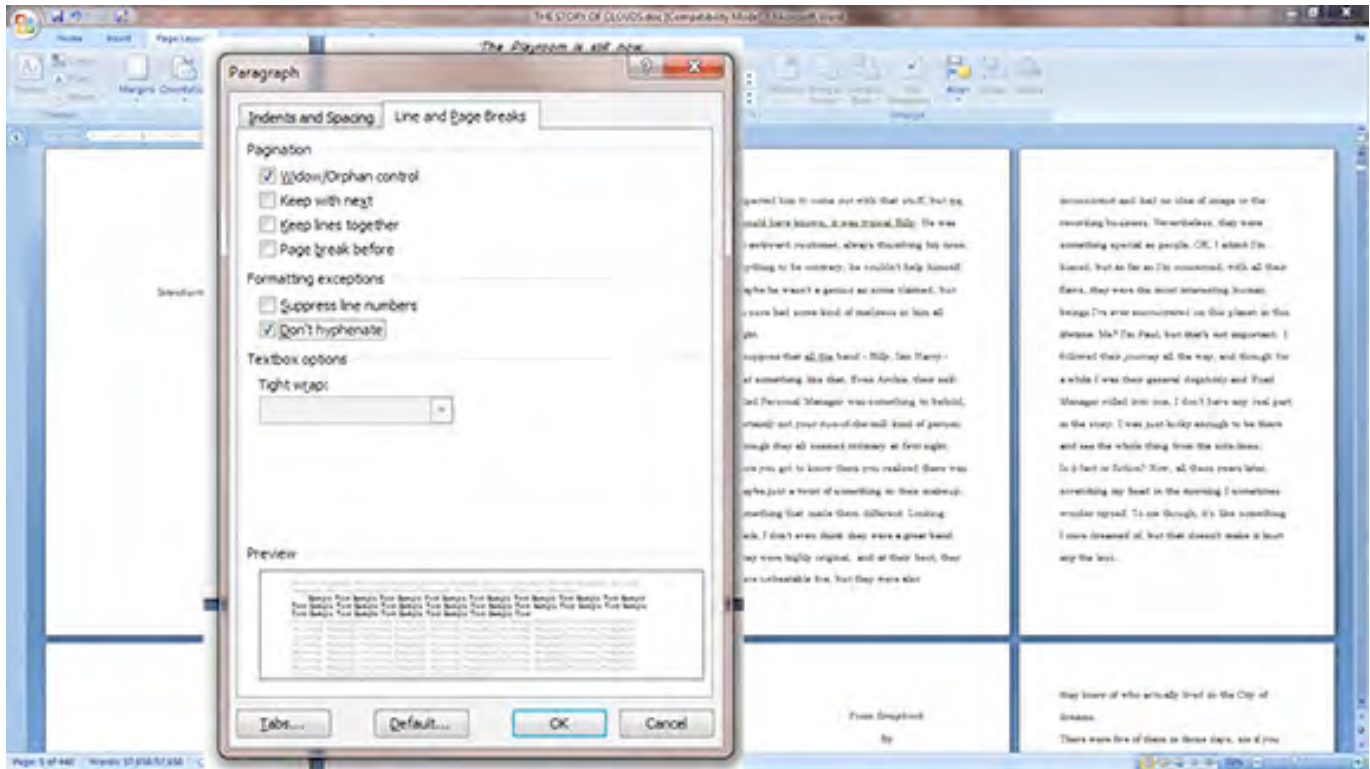


Figure 14

16. You will see that spacing now has the appearance of a professional book (Figure 15)

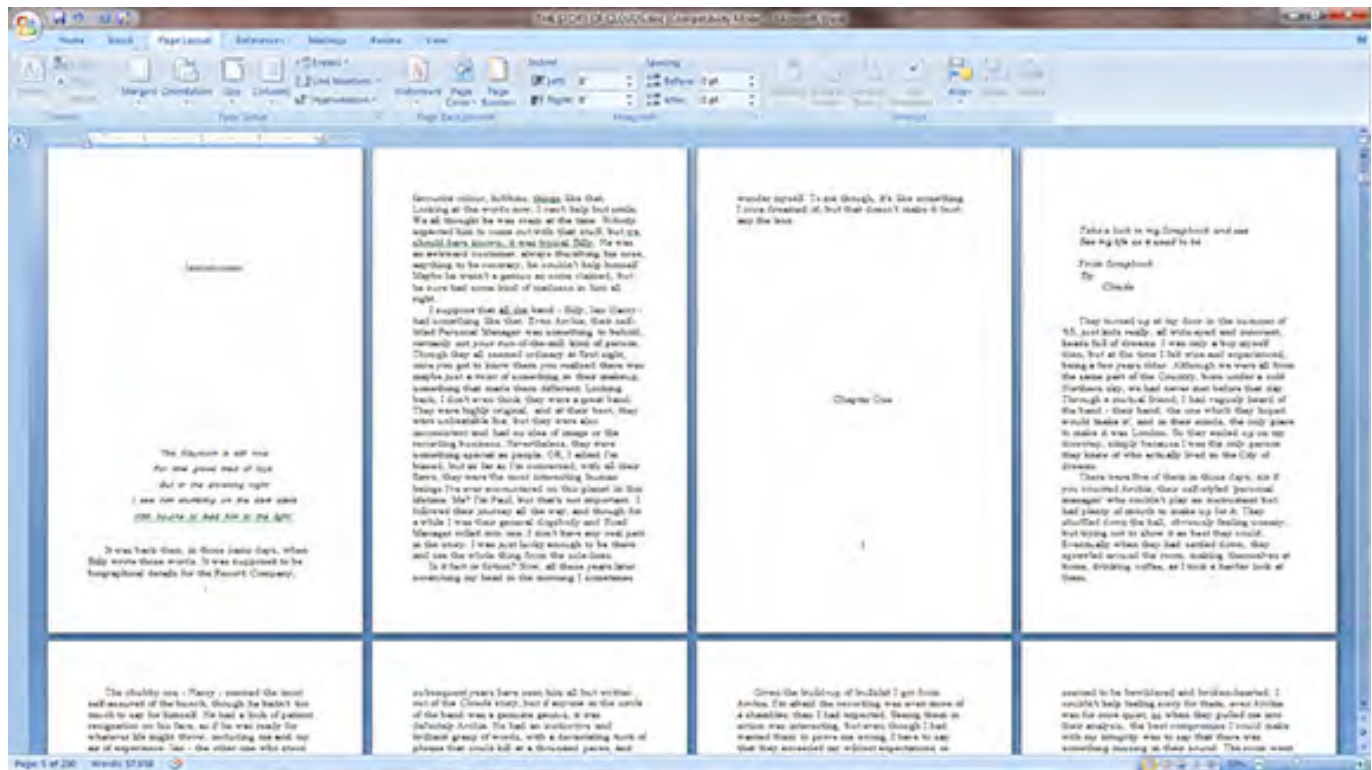


Figure 15

17. Place an insertion point before “Chapter One” (Click before C). On the Page tab, Click on the Breaks button, drop down to Next Page and click. This will move the insertion point to the next page and create a Section. Section breaks are useful for creating different visual aspects for different parts of a book, and for creating a Table of Contents, especially when an eBook is later created for the final print formatted file. (Figure 16)

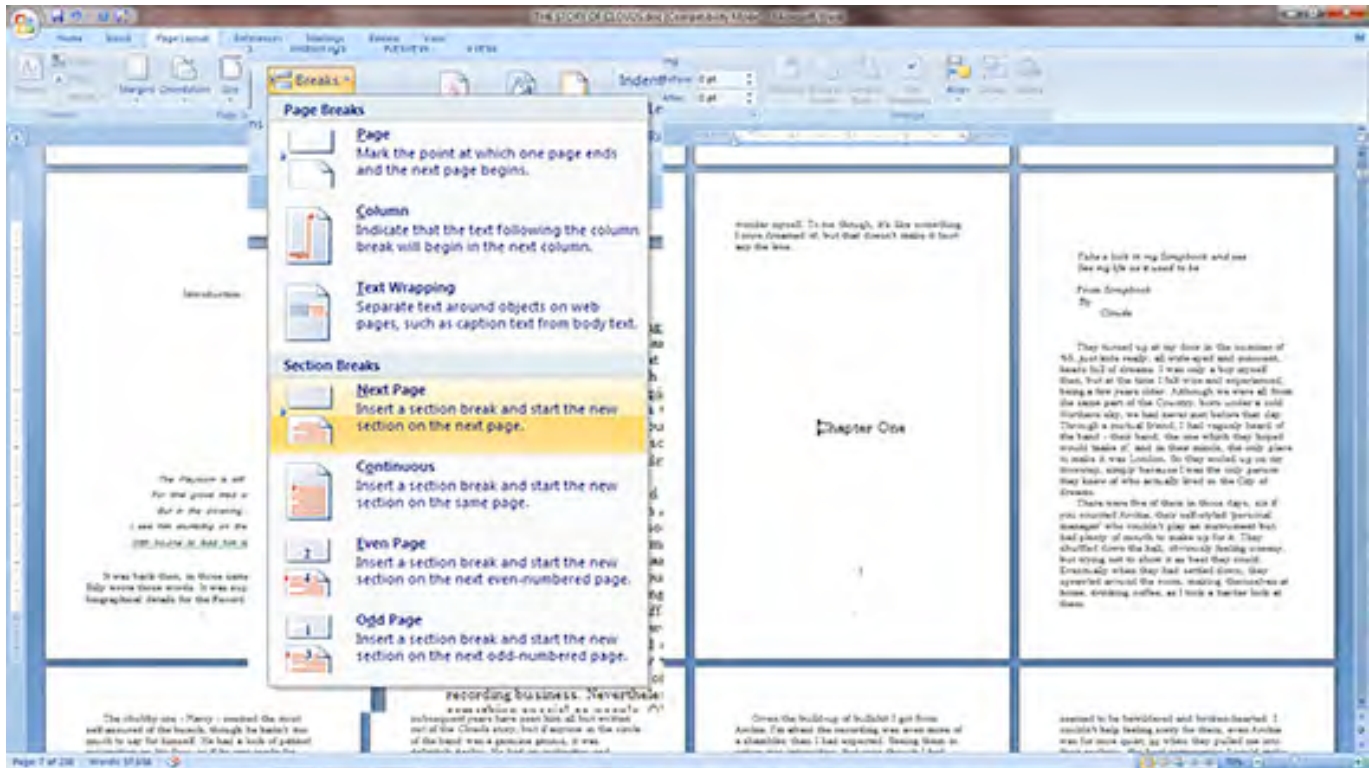


Figure 16

18. Notice that Chapter One has moved to a new page. (Figure 17)

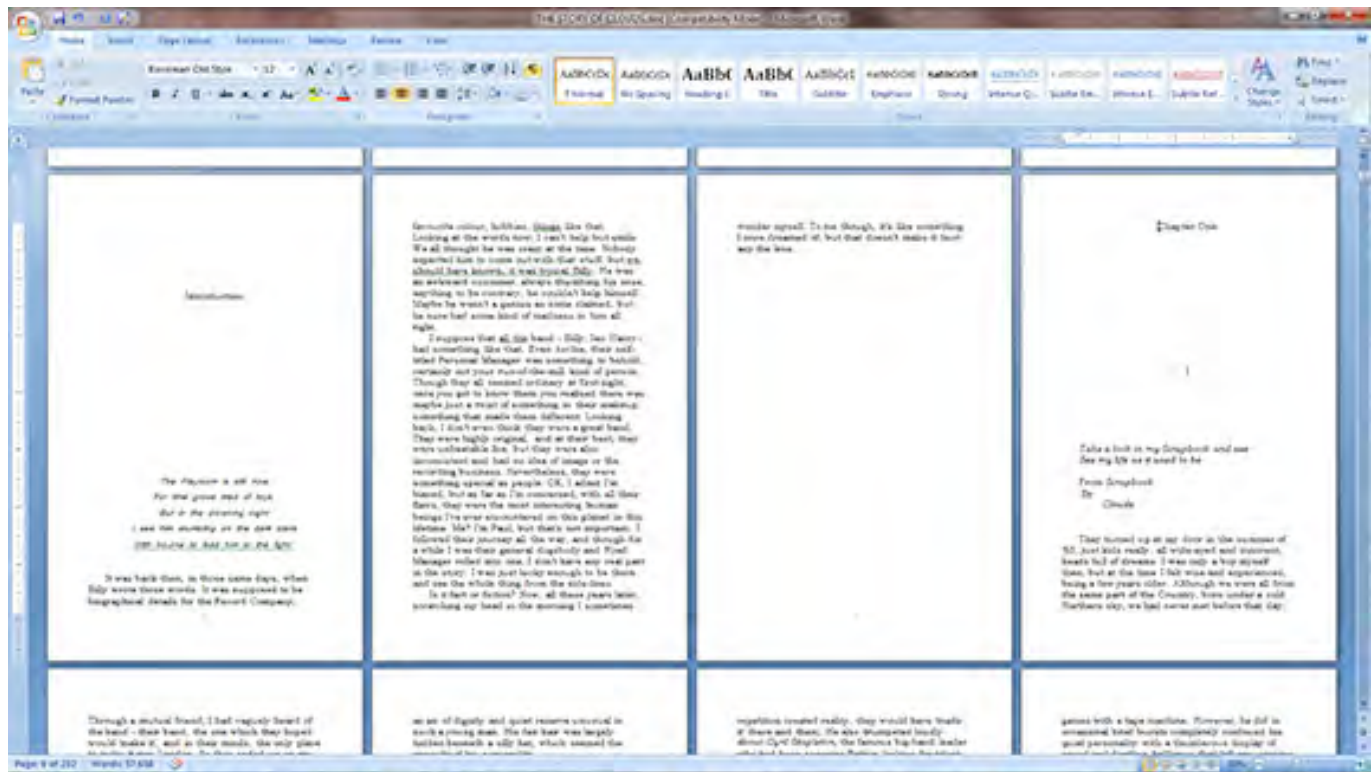


Figure 17

19. At this point, click on the Show Non-printing Characters button (looks like a backwards P). This will show formatting marks, and breaks. Notice that the insertion that has just been created now shows Section Break (Next Page). (Figure 18)

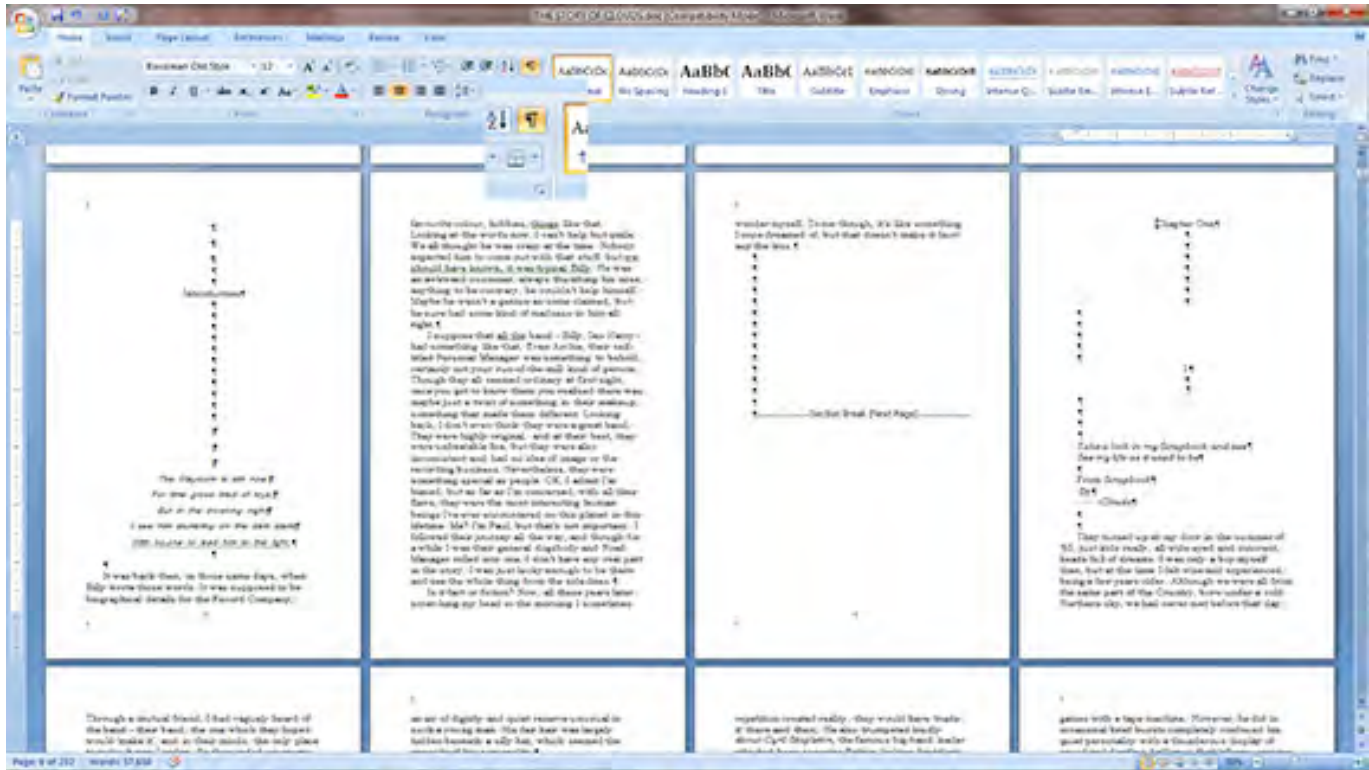


Figure 18

20. Click the bottom right corner of the Microsoft Word window and drag to the left until there are only two pages showing, or resize the magnification by dragging the slider to the left to make the pages larger, again, until two pages are showing. This will help you to visualize the front and back of a two-sided book page. (Figure 19)

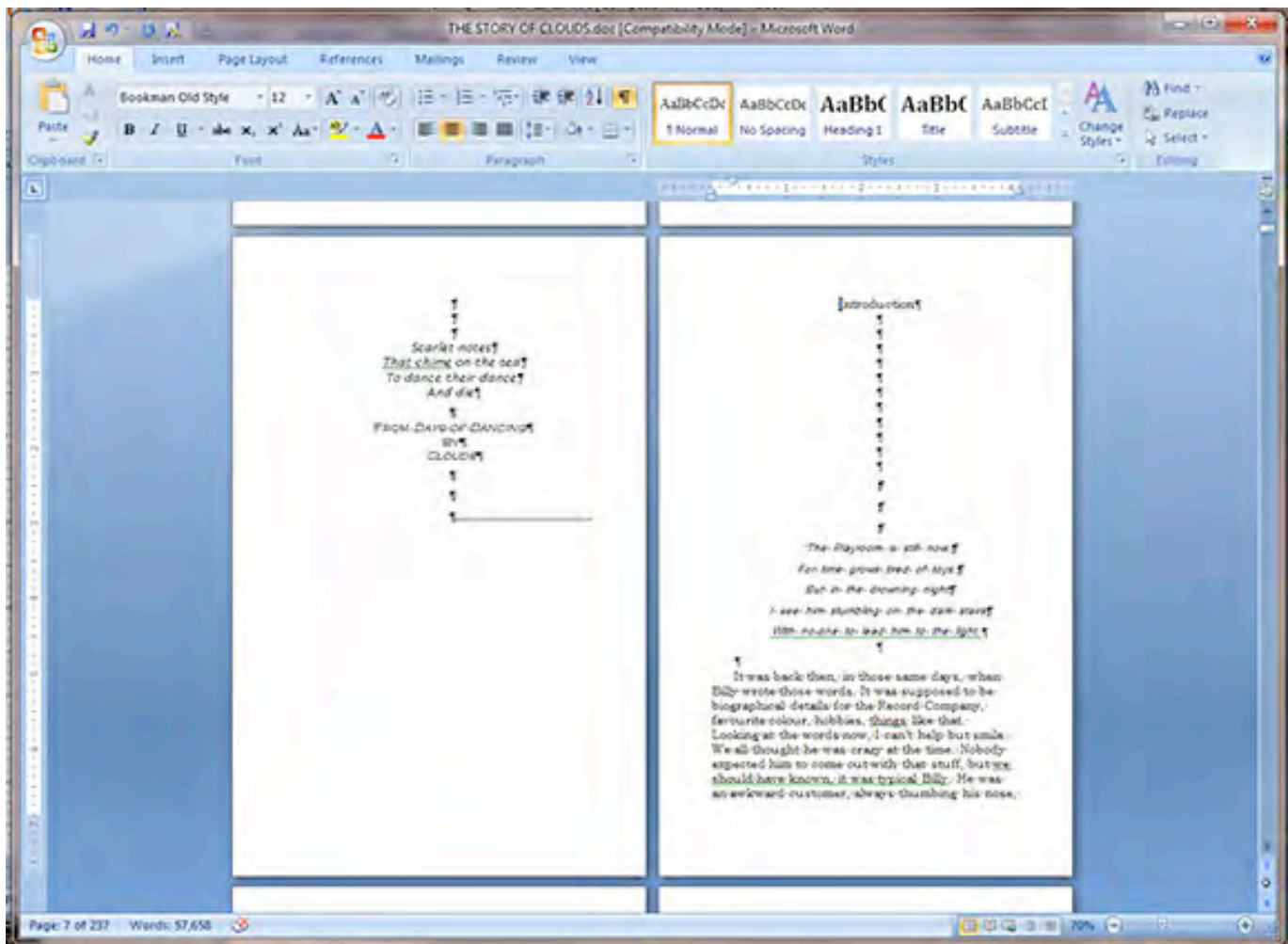


Figure 19

21. Now you will want to clean up the formatting of your pages as you go. For example, delete spacing between the Introduction title and the text. (Perform these tasks according to your own preferences) It is useful to note the items like the number of Paragraph Marks between the word Introduction and the text below. In this case, 3 marks. Repeating this in following sections (chapters) will ensure uniformity throughout the book and make it look more professional. (Figure 20)

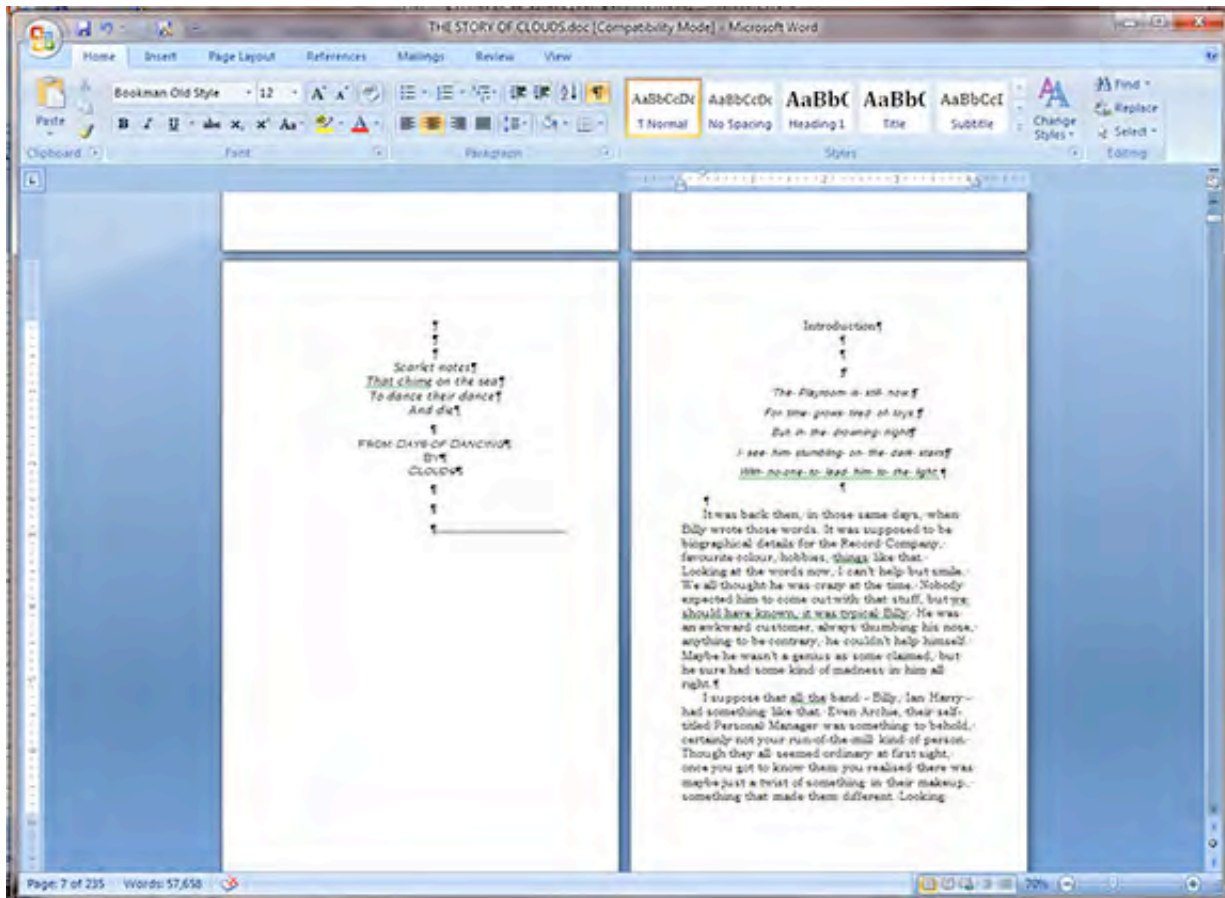


Figure 20

22. Notice that the Introduction page is on the right size of the two page set. The Left/Right setup reflects the Front/Back of a book page. You will want to insert a new Page Break to move the Introduction page down to the next Left page. (Figure 21)

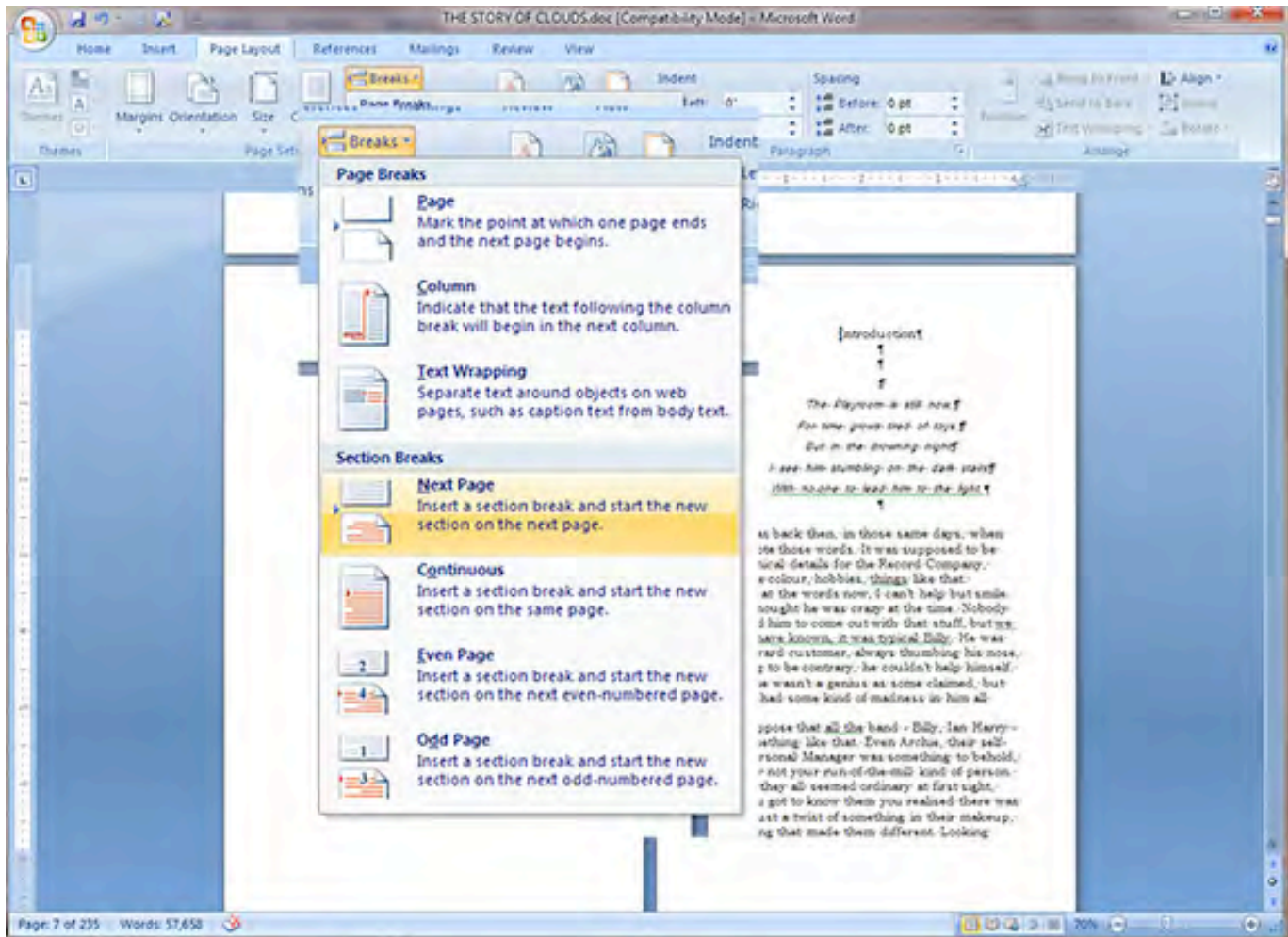


Figure 21

23. You now see the proper setup for the beginning of each section. Repeat this technique throughout the book.(Figure 22)

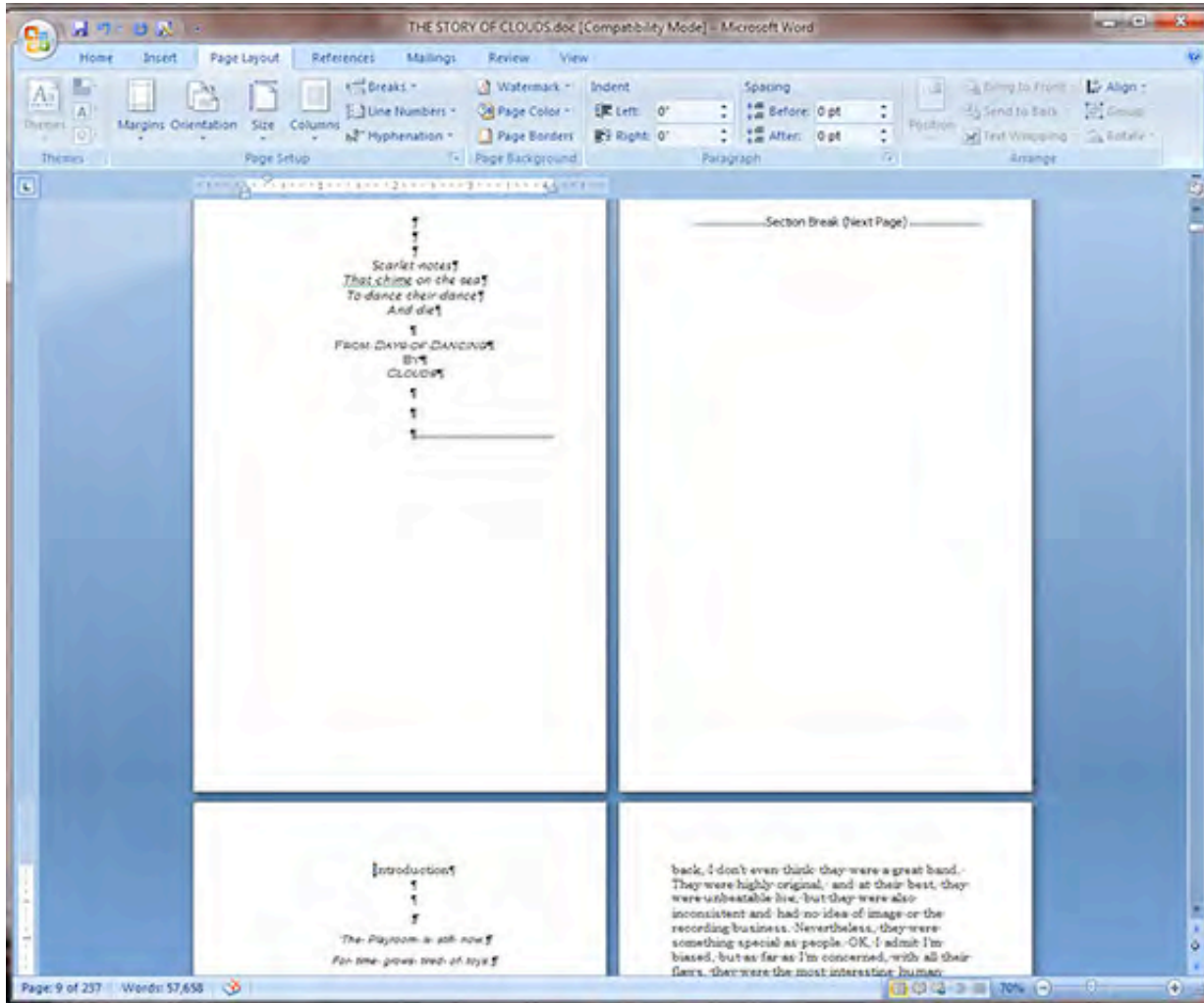


Figure 22

24. As you work through the spacing and section breaks of each chapter, you can change the font format for titles in the book. In this case, we select the Home tab, and change the font for “Introduction” to Cooper Std Black, font size 14 (or whatever you would prefer). Again remember this preference for later chapter headings. Also, notice the indentation offset in the ruler area above the page on the right. (If the ruler isn’t visible, click on View at the top of the window, drop down and click the Ruler selection to show it) This was created when setting the indentation of the first line for each paragraph. This is also affecting other parts of the book, in this case, the header area for the chapter that we are in. “Introduction” and the quote below it are shifted to the right and will need to be moved back to the left. (Figure 23)

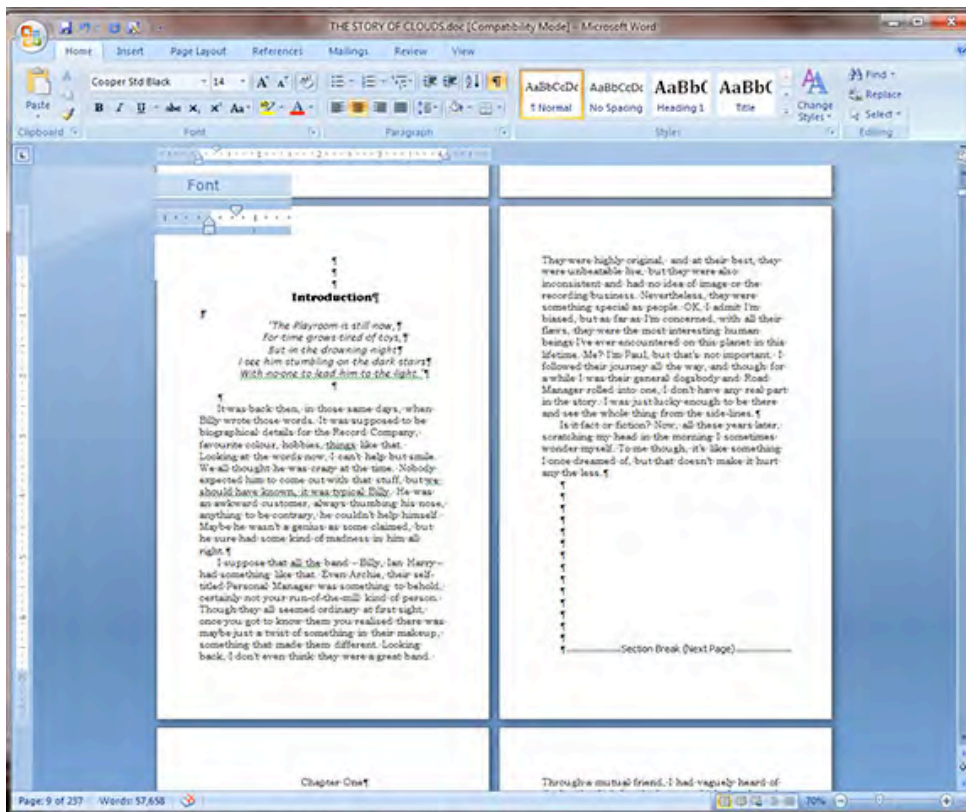


Figure 23

25. Notice in Figure 24, we highlight the header area. Then notice the two facing pointers on the ruler area indicating indentation. Select the top pointer and slide it back to the edge of the margin matching the two arrows. This will re-center the header for the chapter (assuming it was centered, or if it was left justified, will move it to the left edge of the text). This can also be done in the Paragraph dropdown used before. (Figure 24)

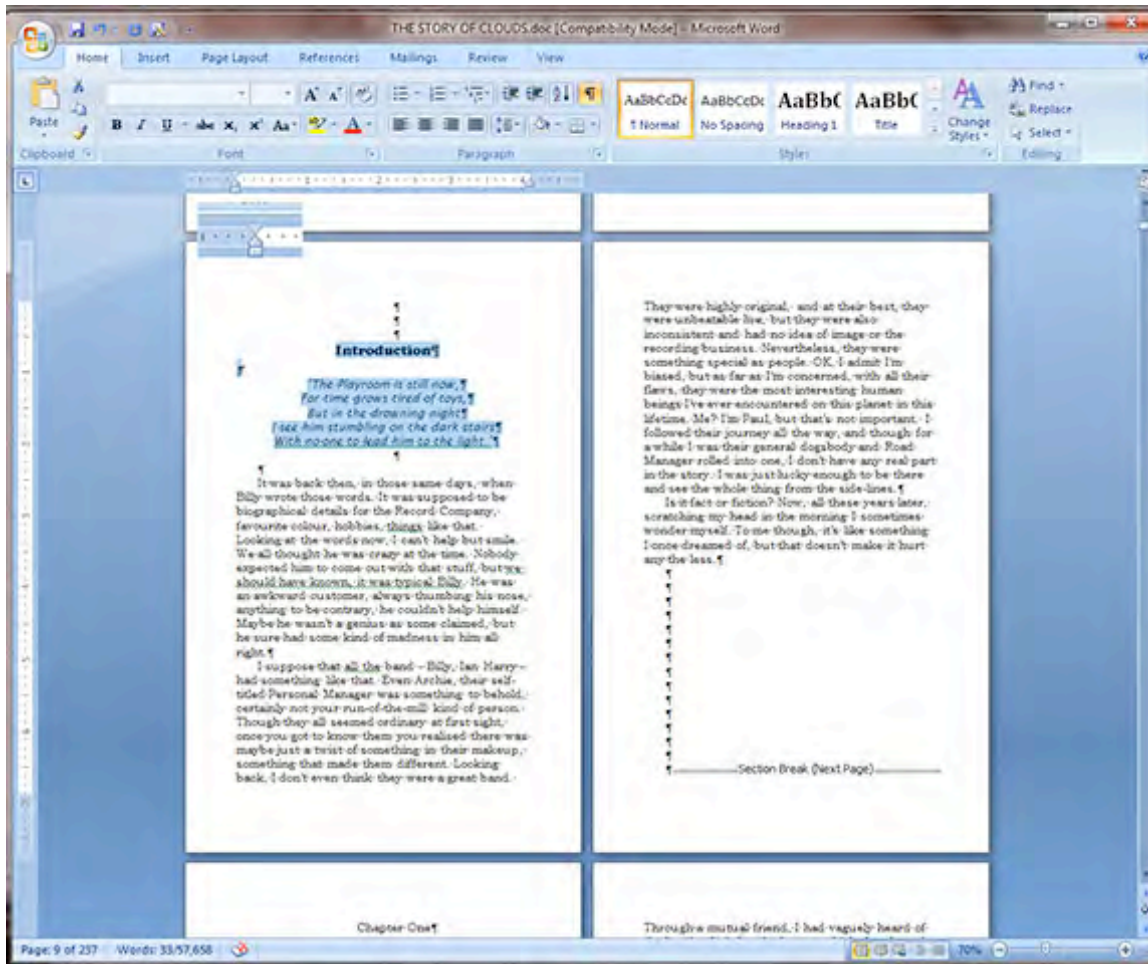


Figure 24

26. Now it's time to set up the Header and Footers for the book. This is a slightly complicated process in which you essentially "Train" the word file as to how you would like the header and footer to appear. First double click in the area above, or below the text on the page to open the Header/Footer area for editing. Notice that the text for the book is grayed out and not editable, and there is some extra information shown in the tabs for the header and footer. You will find the Even/Odd Page designations, the Section number, and whether the header for a particular page is connected to pages before it (Same as Previous). Note that Same as Previous not only refers to the page right before the page in questions, but also to the page that matches it in Odd/Even designation (The page that is two pages before the page in question). This is an important theory to keep in mind when setting up the header and footer text in directions to follow. Notice in Figure 25 that the tools panel at the top has changed. The Header & Footer Tools panel is now available. You will be leaving from and returning to this panel during this process, so remember where it is. (Figure 25)

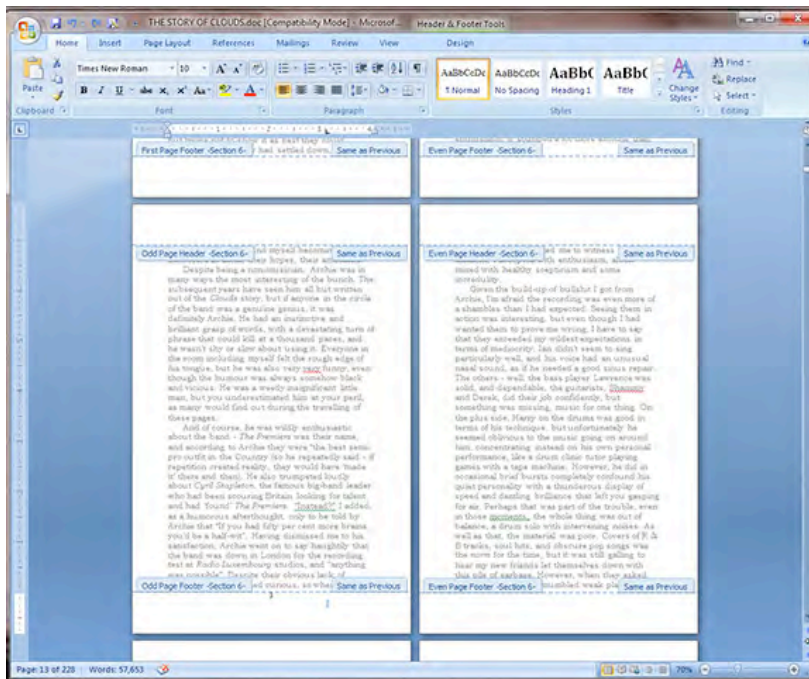


Figure 25

27. To start the process, return to the beginning of the document. (Figure 26)

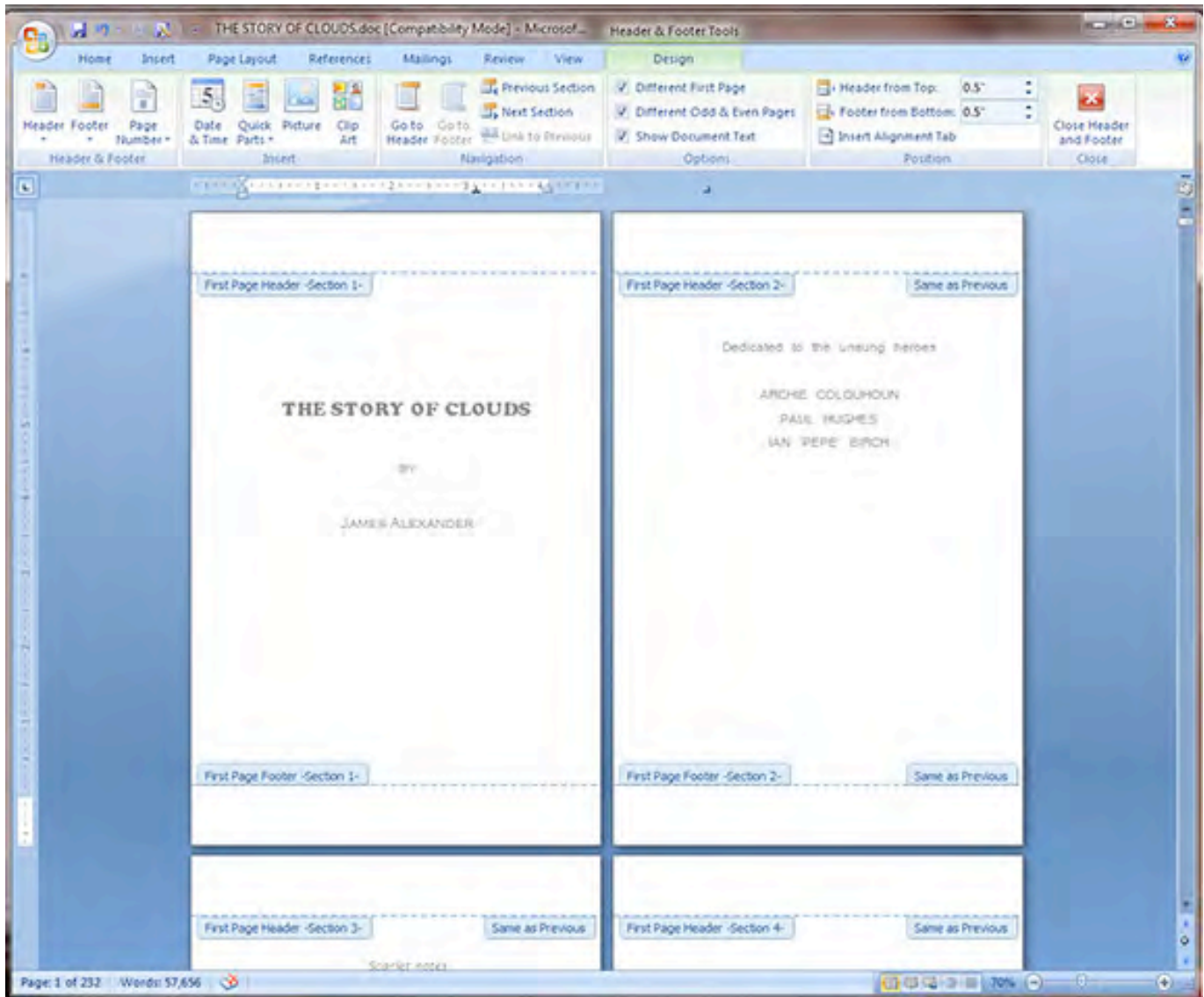


Figure 26

28. Notice that you can click on the Home tab to access the font tools. We will be going back and forth between the font tools and the Header & Footer Tools tab. (Figure 27)

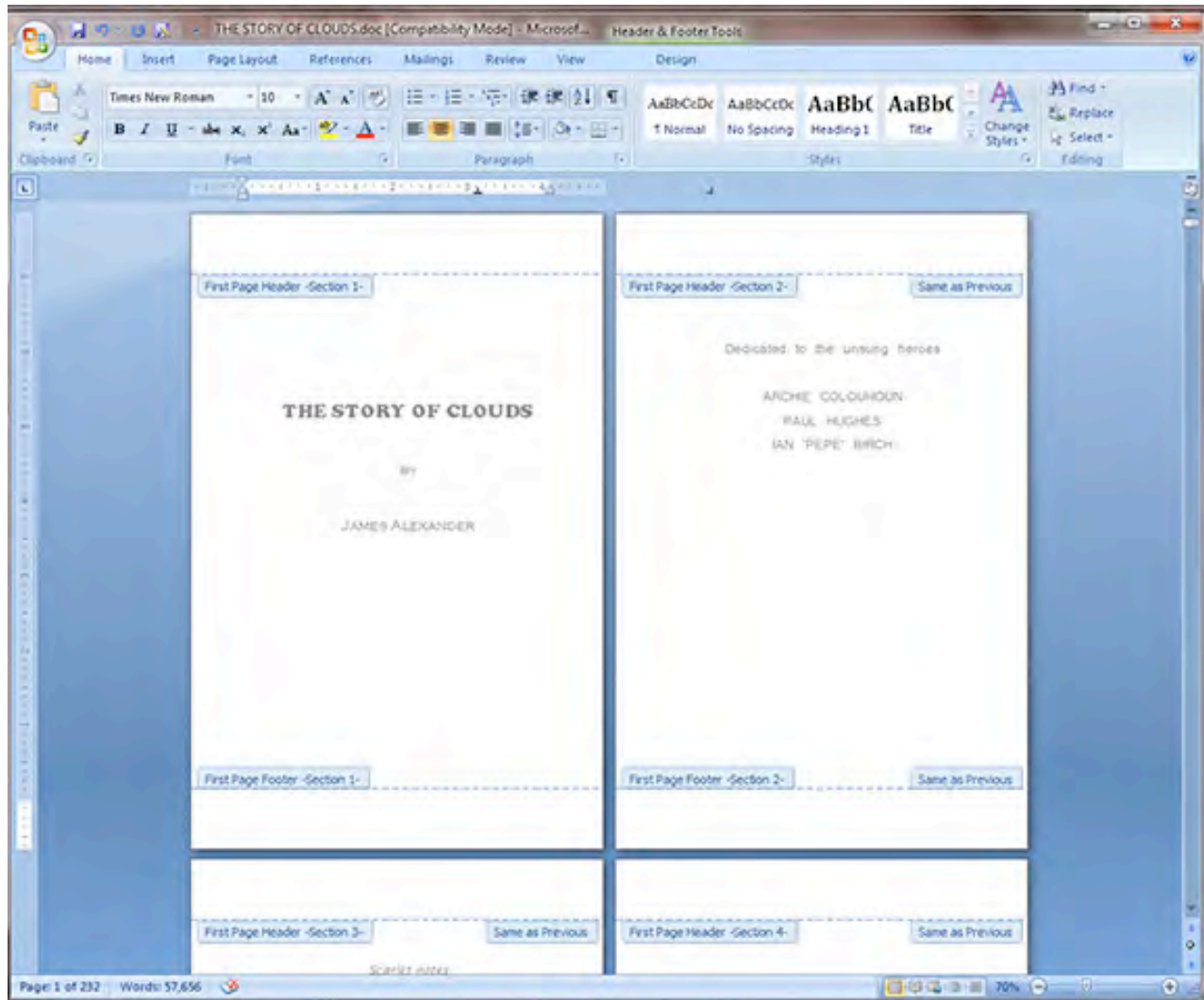


Figure 27

29. We will start with the insertion of pagination. Place an insertion point into the footer of the first page. (Figure 28)

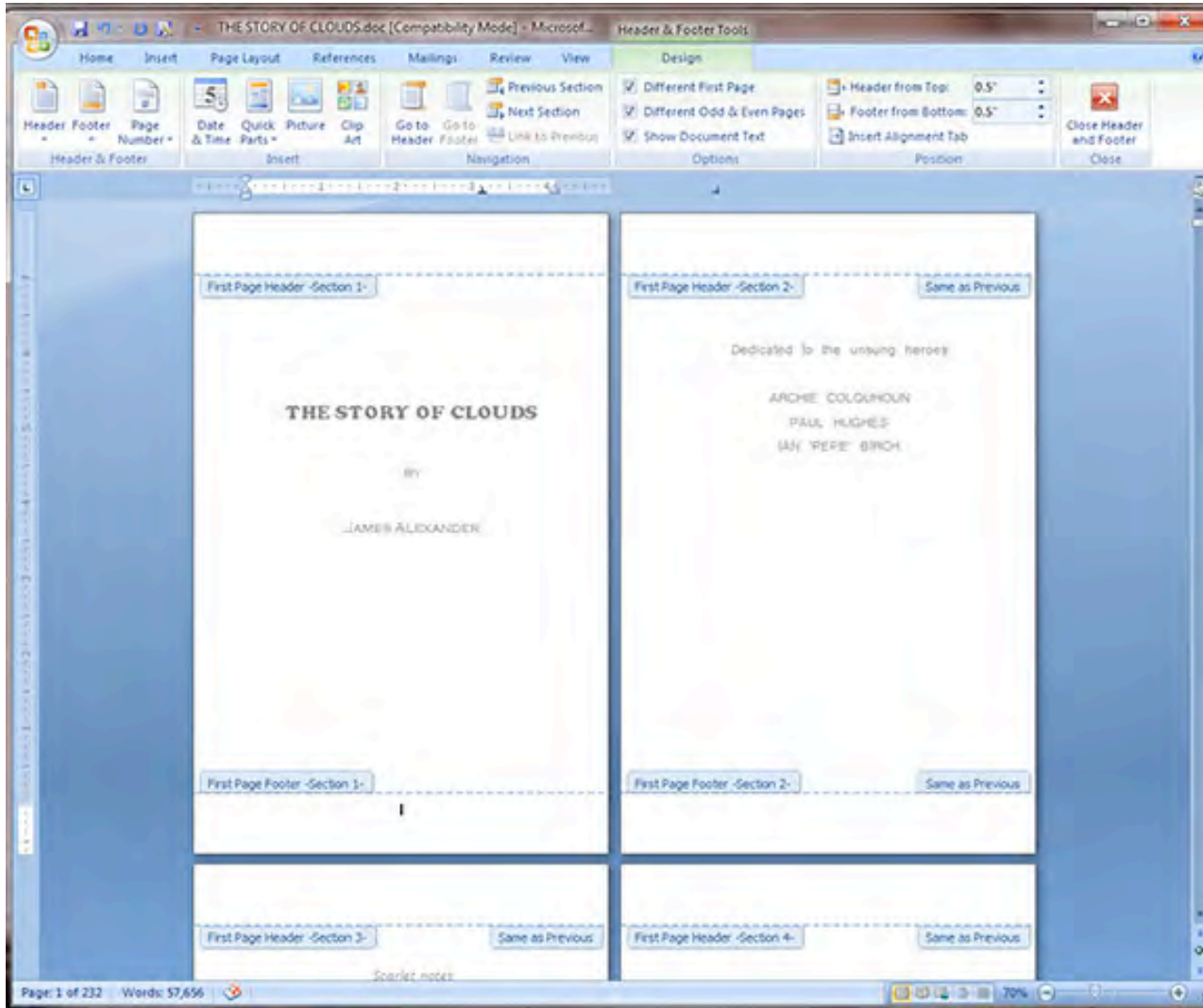


Figure 28

30. In the Header & Footer Tools tab, click on the Page Number button, and drop down to and click Format Page Numbers. (Figure 29)

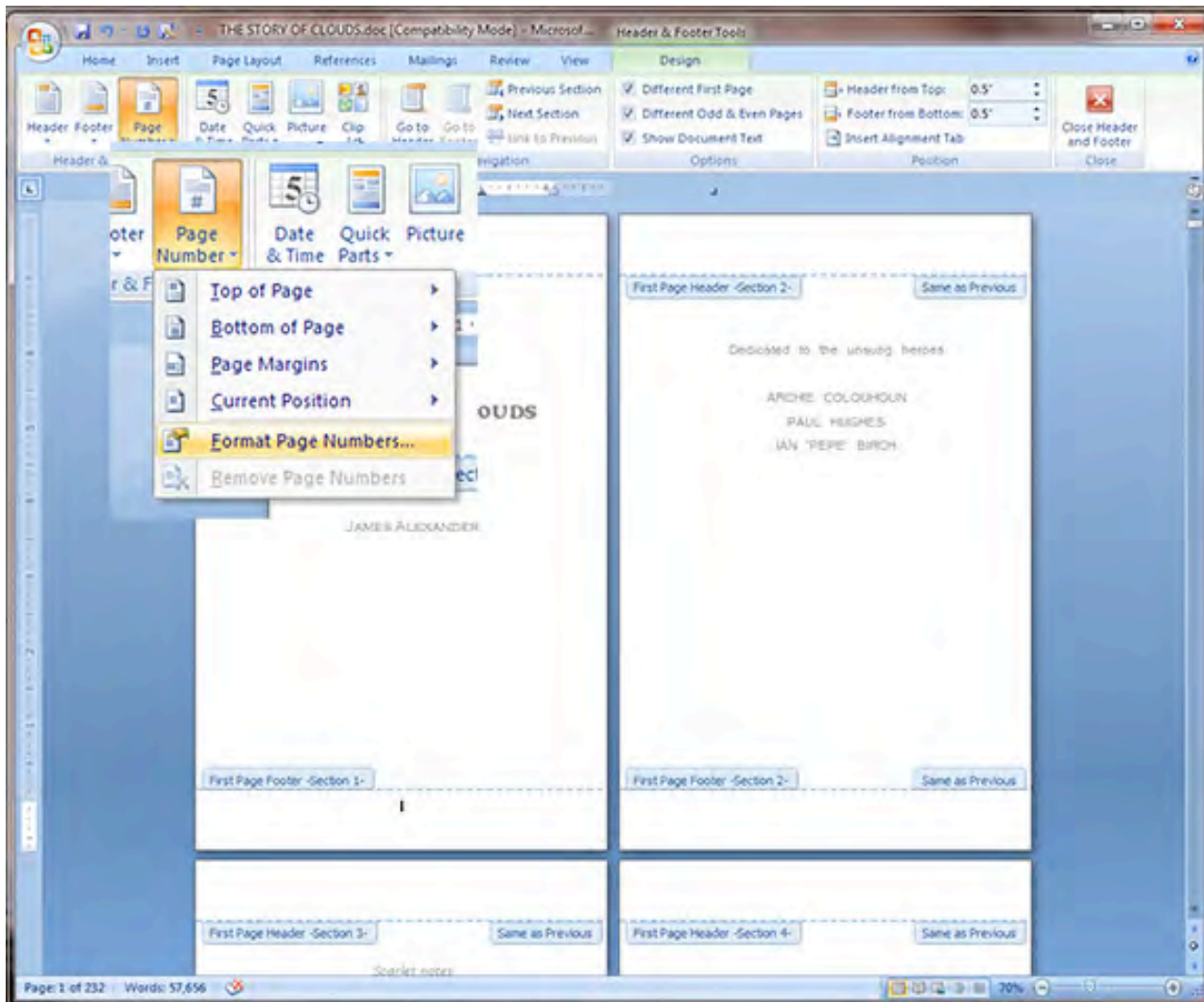


Figure 29

31. The Page Number Format window opens. Note that there 2 sets of items that you will be working with. The Number format and the Page numbering. In this case, we will adjust the Number Format to small roman numerals for the beginning section of the book, followed by numbers for the rest of the book. For the Page Numbering, we will adjust between “Start at” and “Continue from previous section.” (Figure 30)

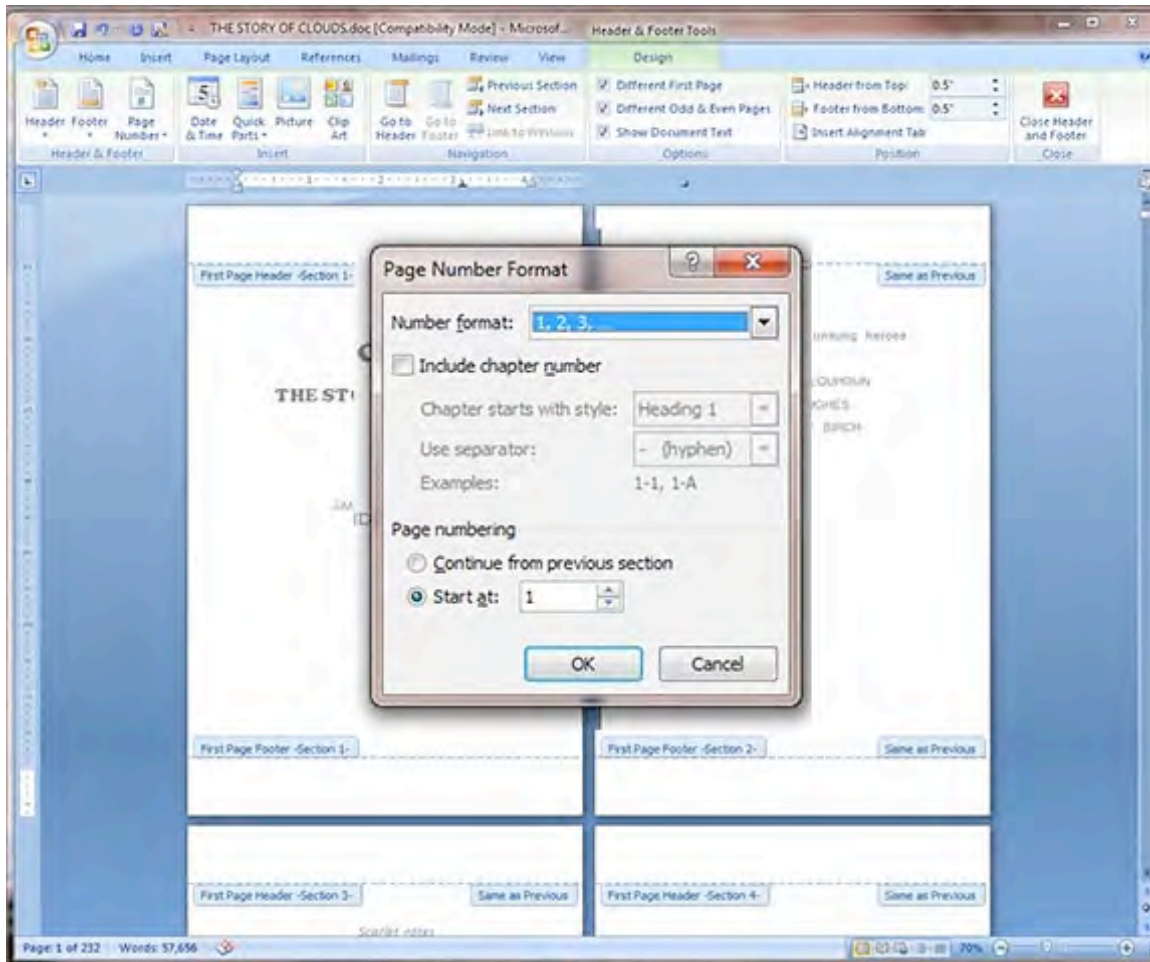


Figure 30

32. We will set the page number for the first page in the book. Under Number Format, change the drop down to small roman numerals. Leave Page numbering at “Start at” i. (Figure 31)

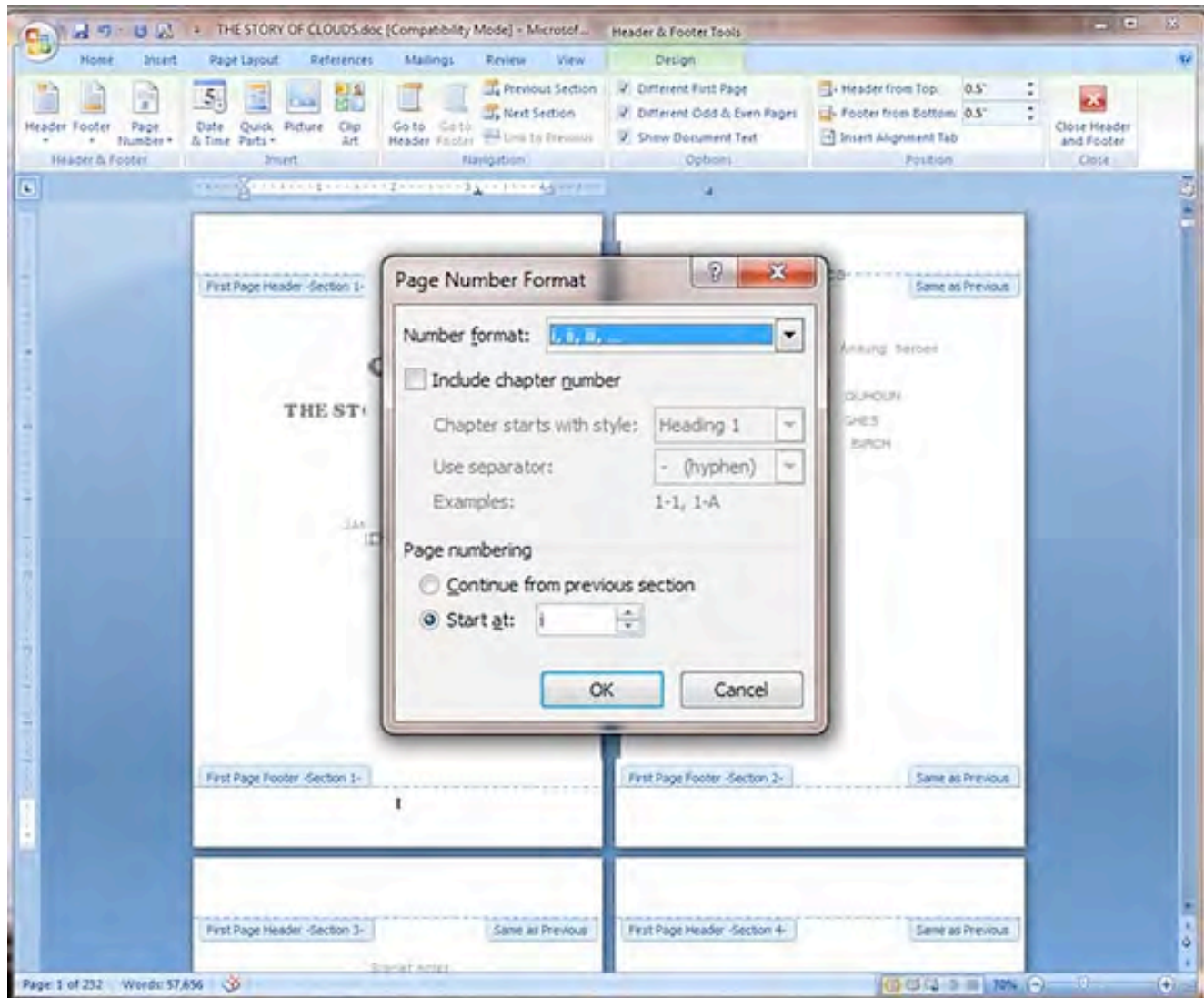


Figure 31

33. Now, click in the Page Number button, drop down to Bottom of Page, then drop down to Plain Number 2 which will center a page number at the bottom of the page. Note that there are numerous options for page number placement under the Page Number dropdown, and under the Footer button found just to the left of the Page Number button. . (Figure 32)

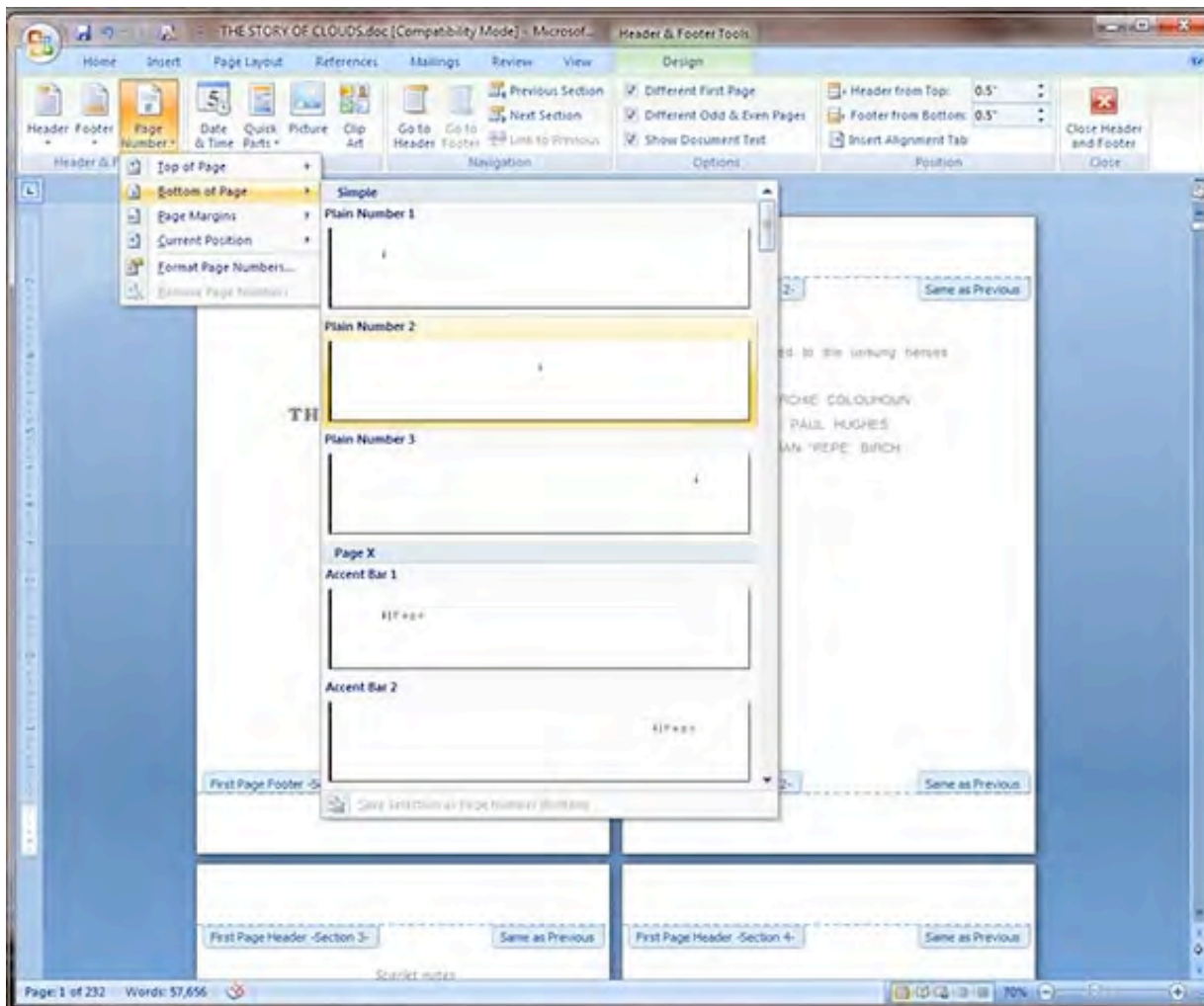


Figure 32

34. Notice that the first page now has page number i, and the second has page number 1. (Figure 33)

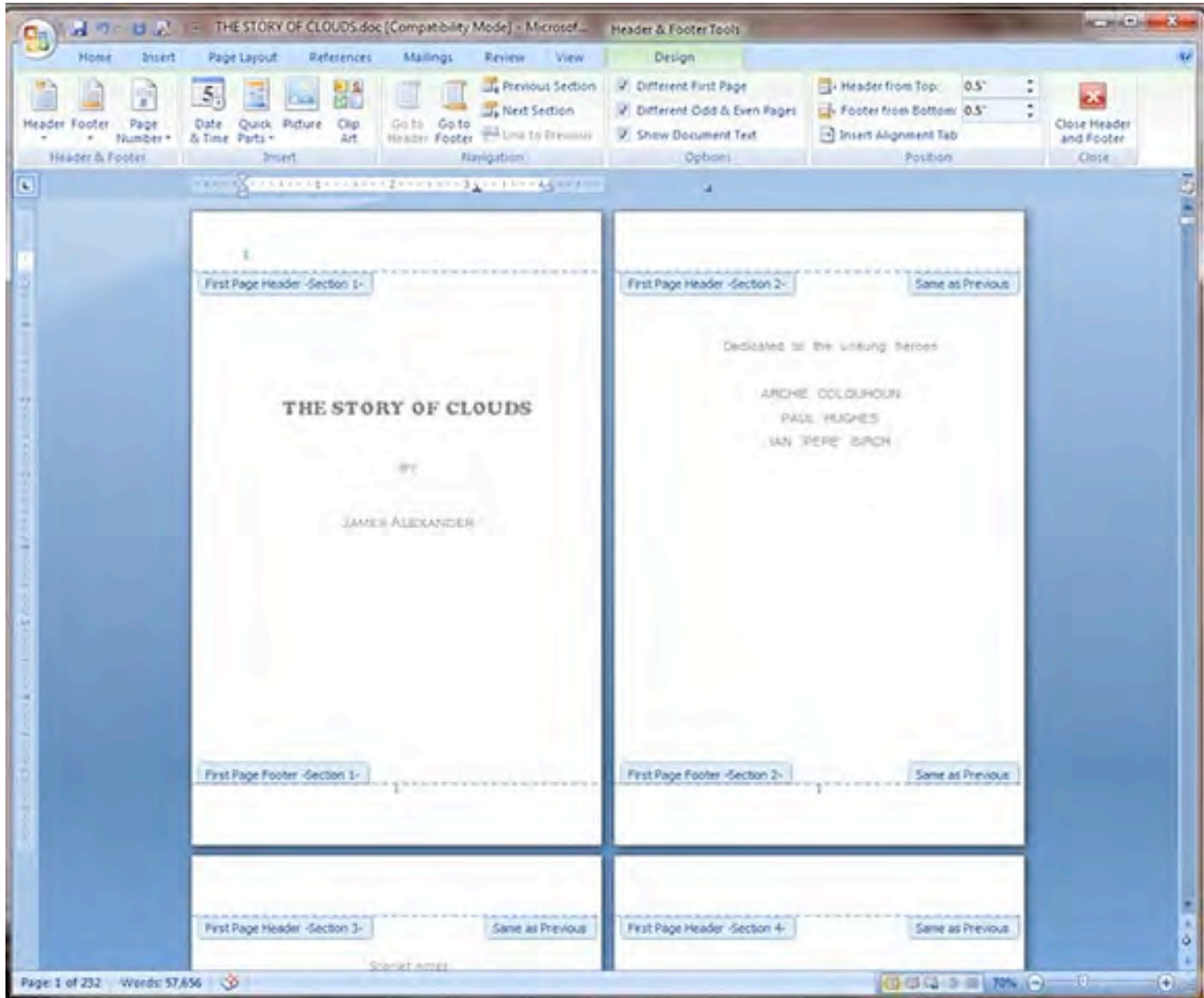


Figure 33

35. Now highlight the page number on the second page. Click the *Page Number* button and drop down to *Format Page Numbers*. (Figure 34)

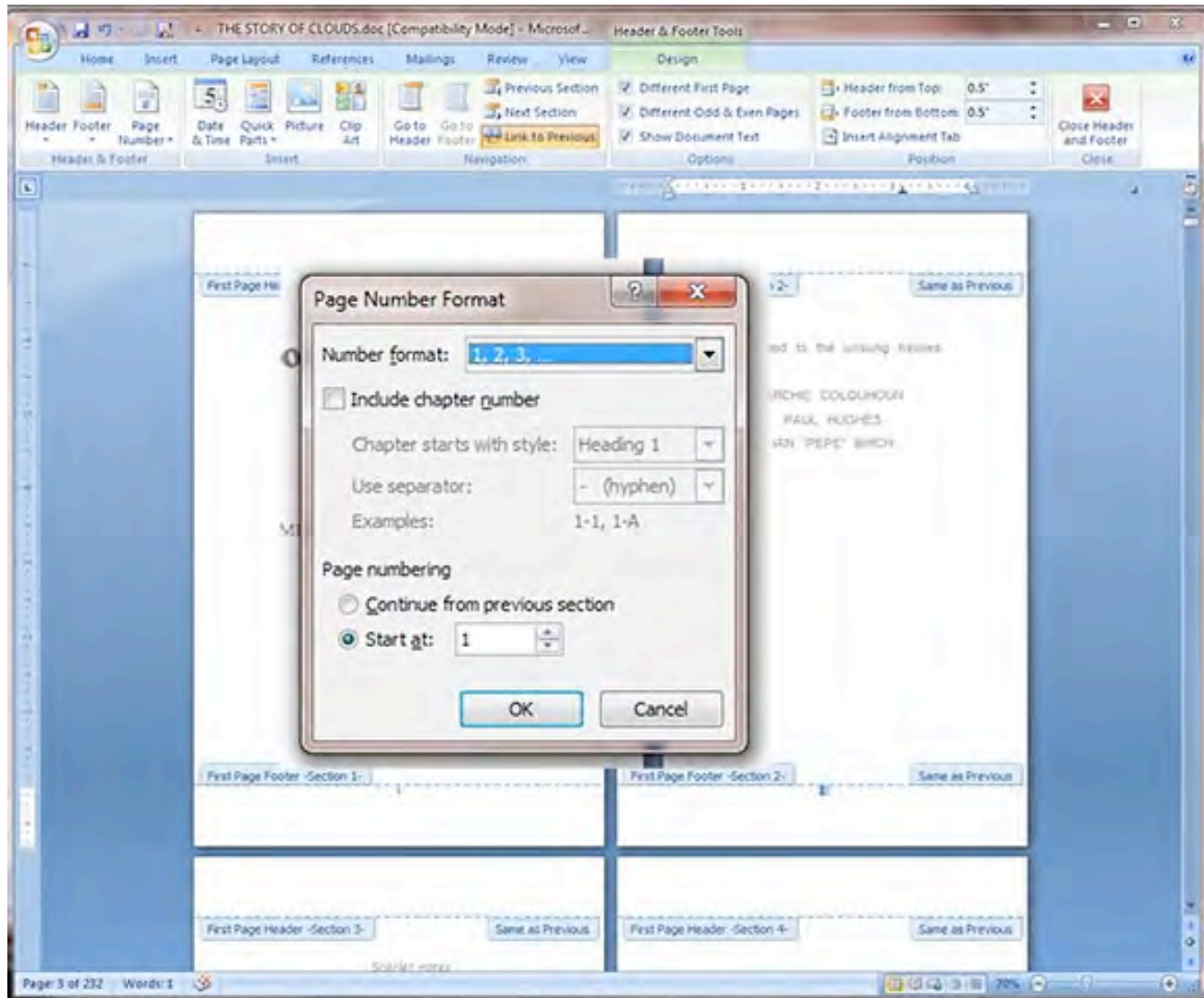


Figure 34

36. Under the Number format setting, select the small roman numerals setting. Under Page numbering, click the Continue from previous section radio button. (Figure 35)

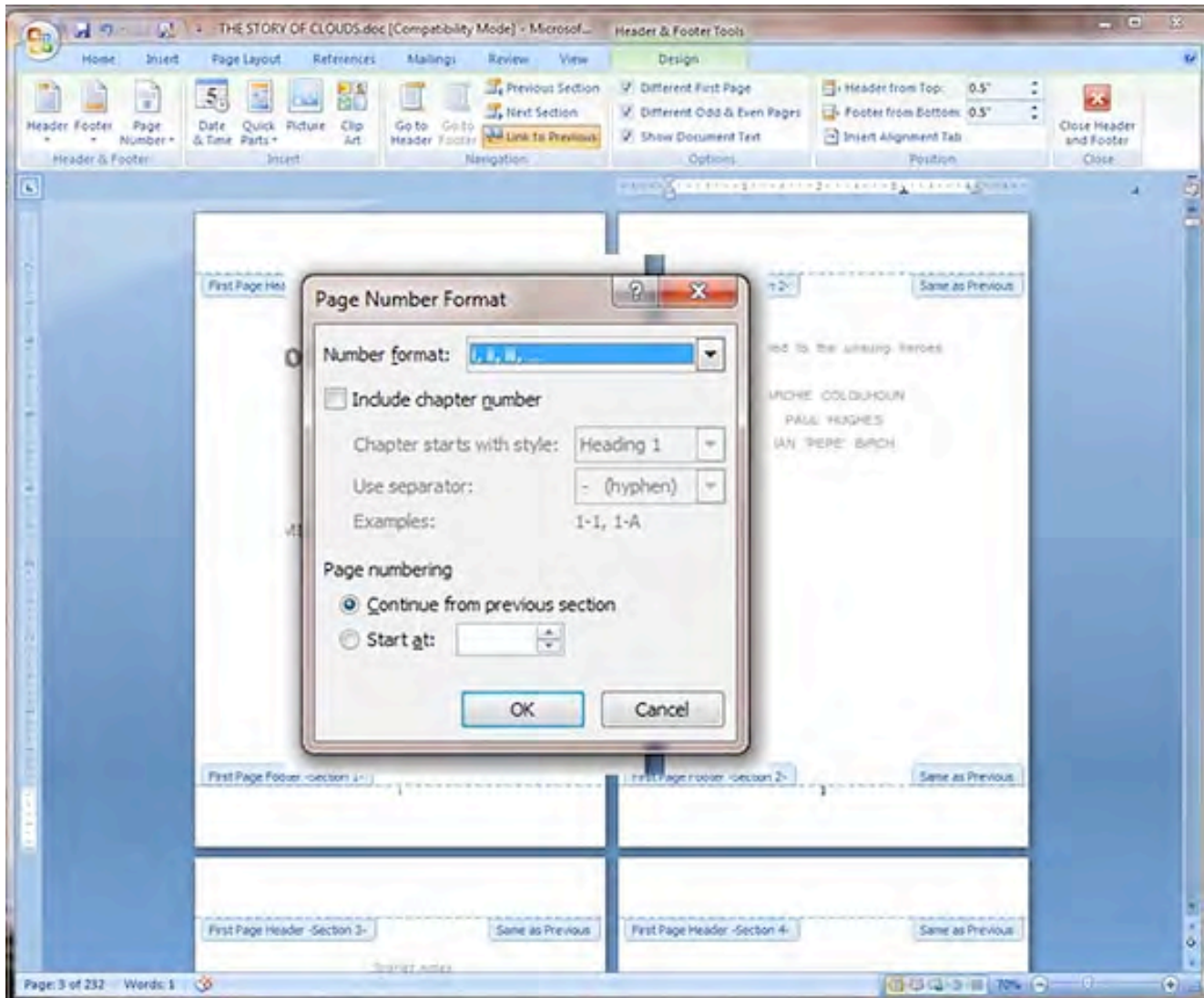


Figure 35

37. Note that the first two pages are now number i and ii. (Figure 36)

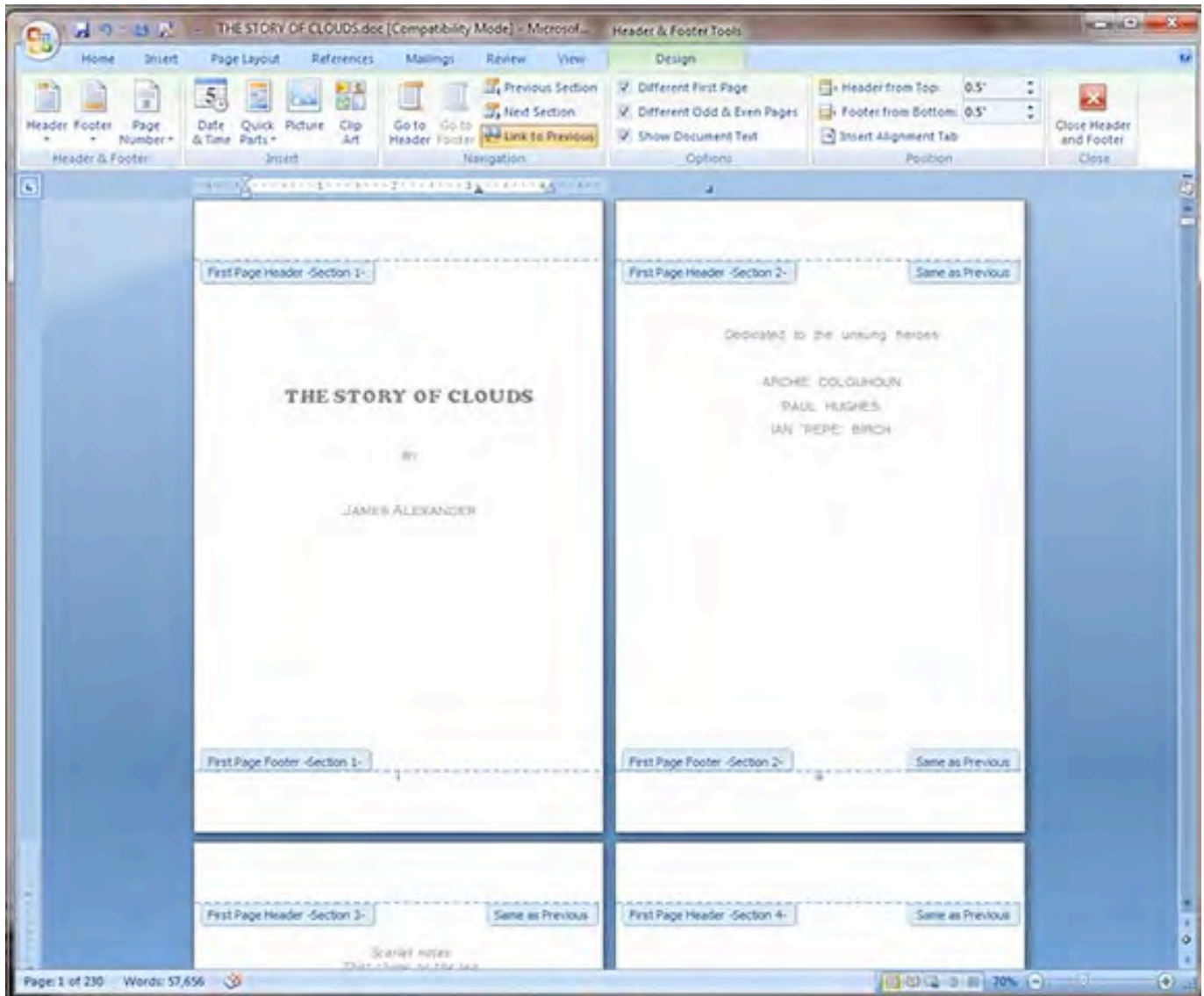


Figure 36

38. Continue this process through the rest of the pages for the opening portion of the book. Note that for this book, the opening pages continued to page viii. Now, the beginning of the main portion of the book should be starting at page 1, and should continue numbering properly. If not, follow the procedure above, using the numbers selection for Number format. (Figure 37)

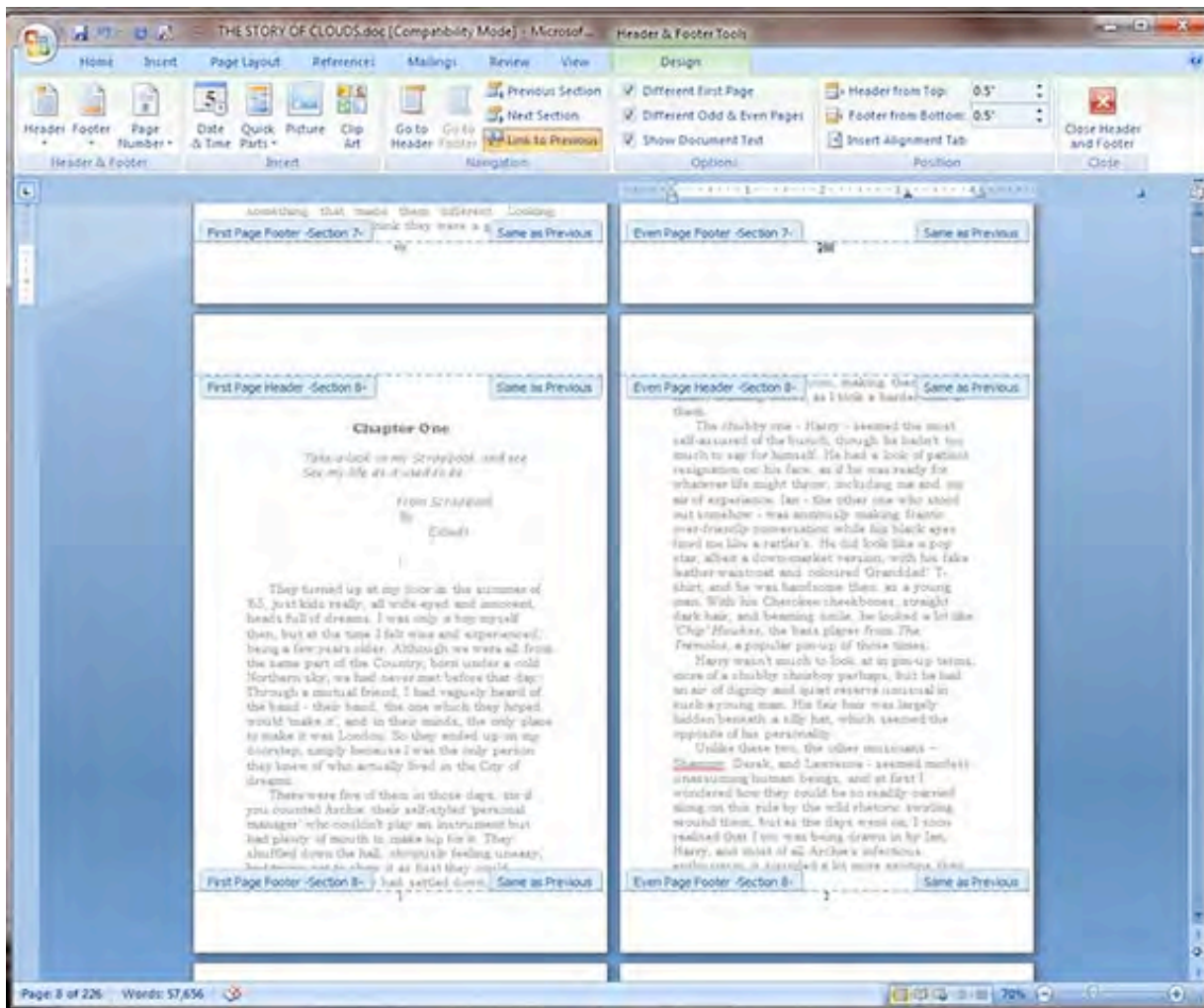


Figure 37

39. Note that as the book proceeds from Section 8 to section 9, in this case from Chapter one to chapter two, the page numbers restart at 1. This does not always happen, but if it does, highlight the page number 1, click the Page Number button and drop down to Format page numbers. (Figure 38)

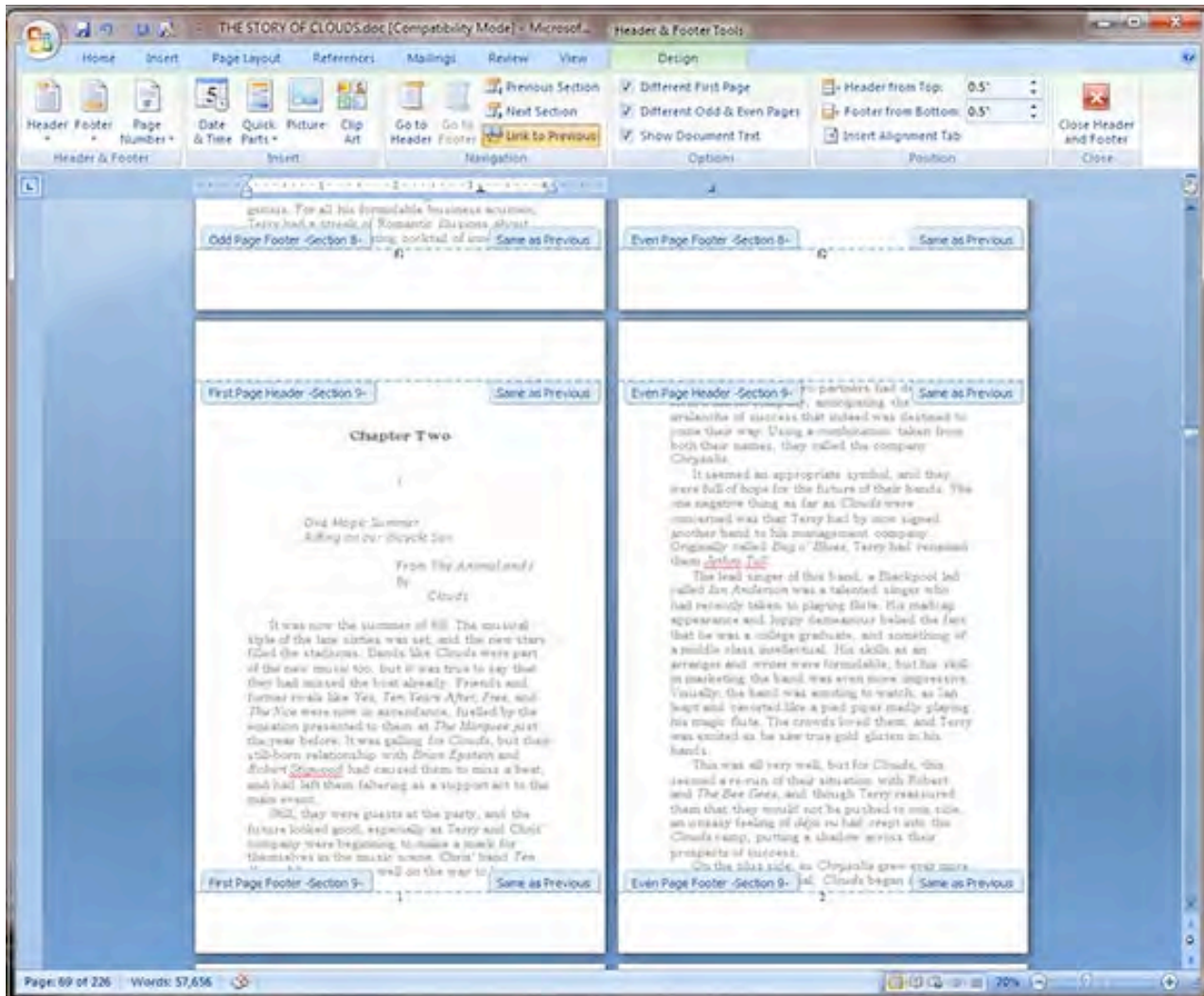


Figure 38

40. Leave the Number format the same, and select the Continue from previous section radio button. (Figure 39)

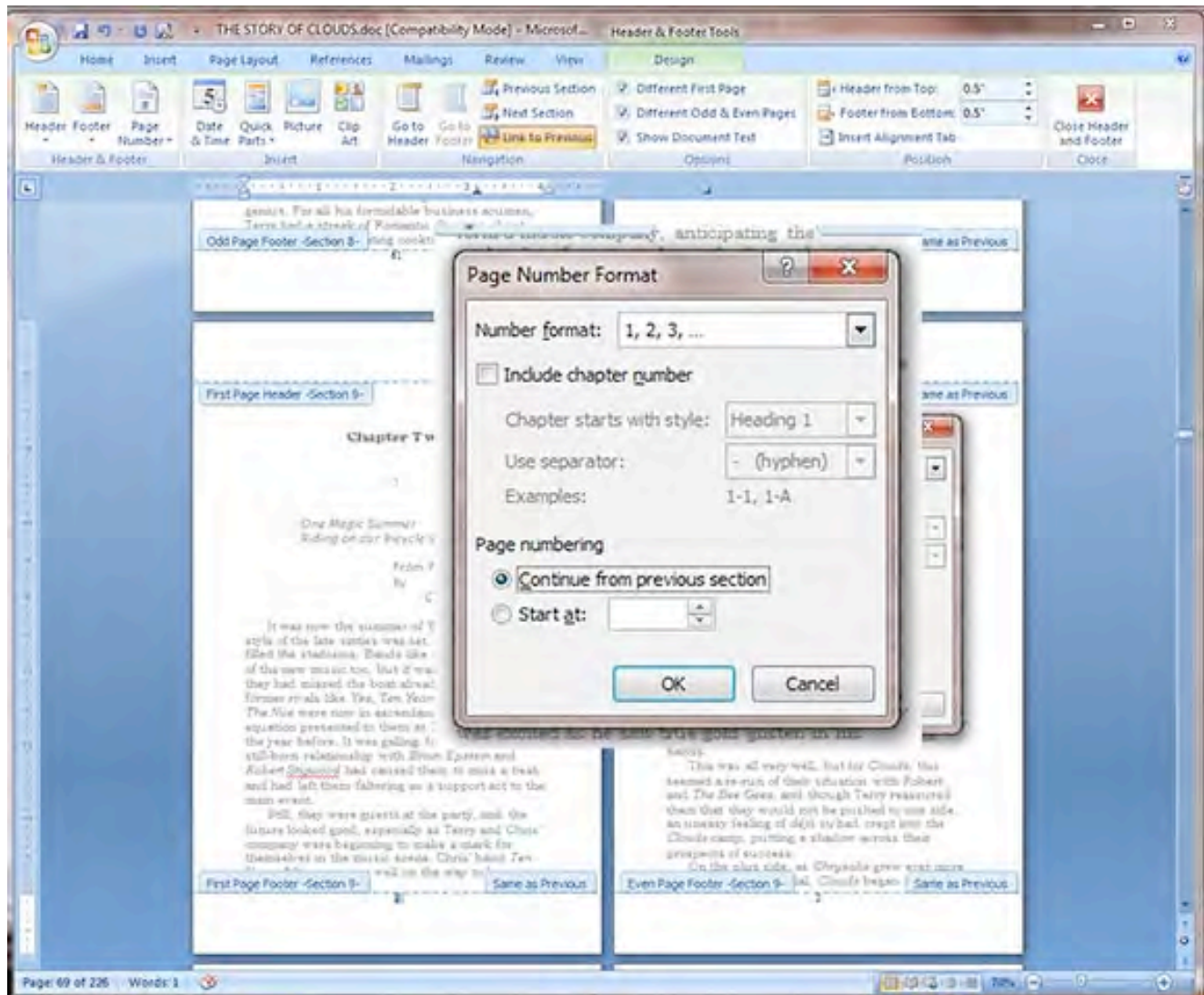


Figure 39

41. You will see that the page numbering has continued. Browse through the rest of the book file, and follow this procedure if this occurs again. (Figure 40)

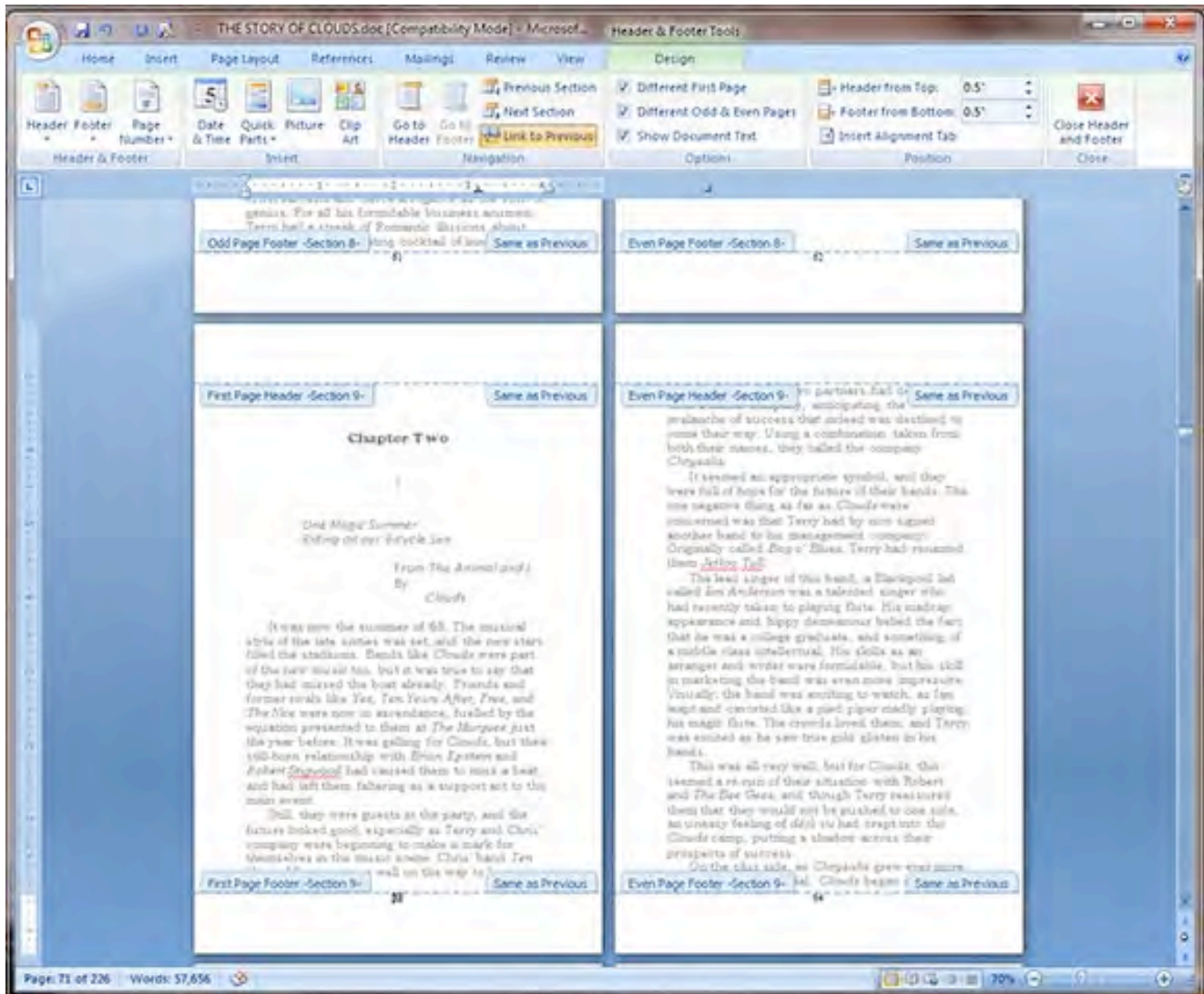


Figure 40

42. Now, let's work on the headers. Go back to the beginning of the book file. (Figure 41)

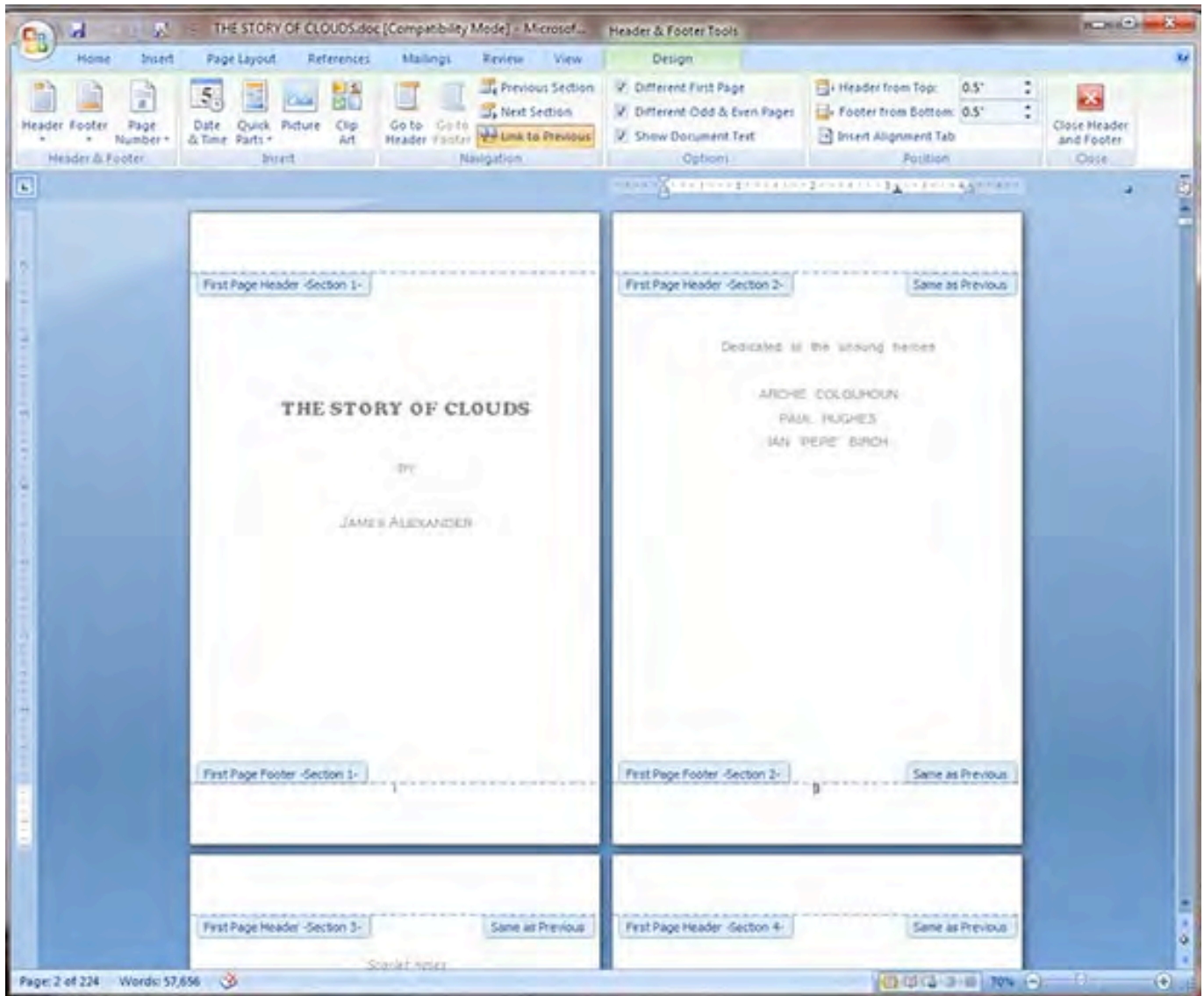


Figure 41

43. We are going to place the author's name on the top of the right page (back of the page) and the title of the book on the top of the left page (front of the page). When the user looks at the book, we want them to see the text on the outside edge of the page, not near the spine of the book. To accomplish this, we will align the author's name to the left of side of the page, and the book title to the right. In this two page setup, it is easy to remember this setup by aligning both toward the center of the two pages.

Let's start by typing the author's name on the top of the second page. You'll notice that the name also appears at the top of all of the other pages. (Figure 42) We will now work to control this behavior.

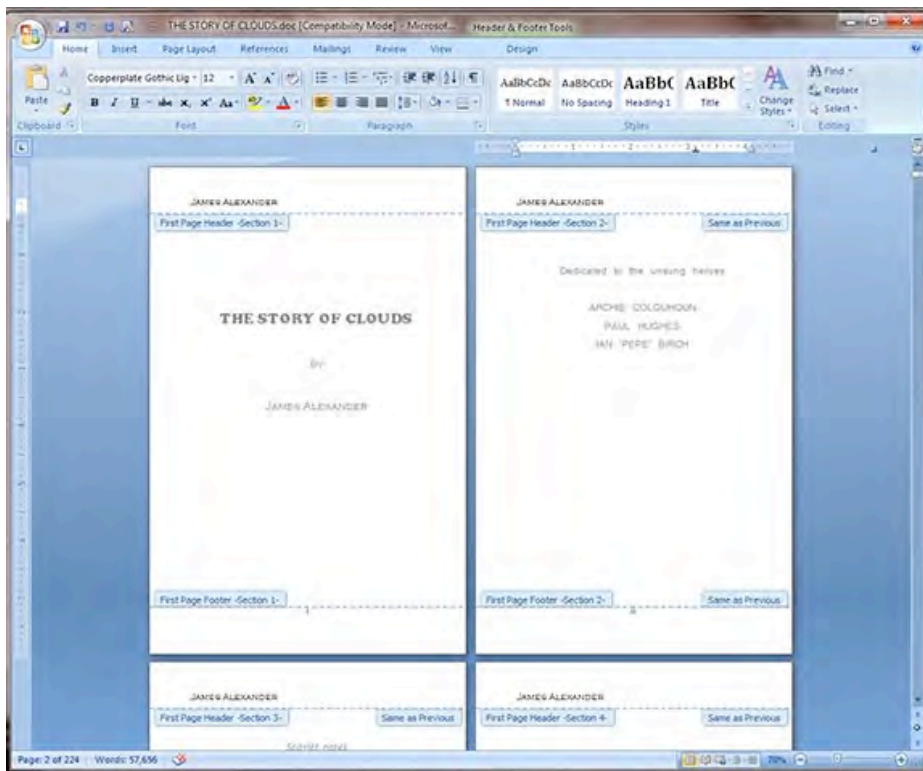


Figure 42

44. Click the Design button under the Header & Footer Tools. Notice the Link to Previous button that is yellow. Place an insertion point in the header of the second page. Unclick the Link to Previous button (It will no longer be yellow)(Figure 43)

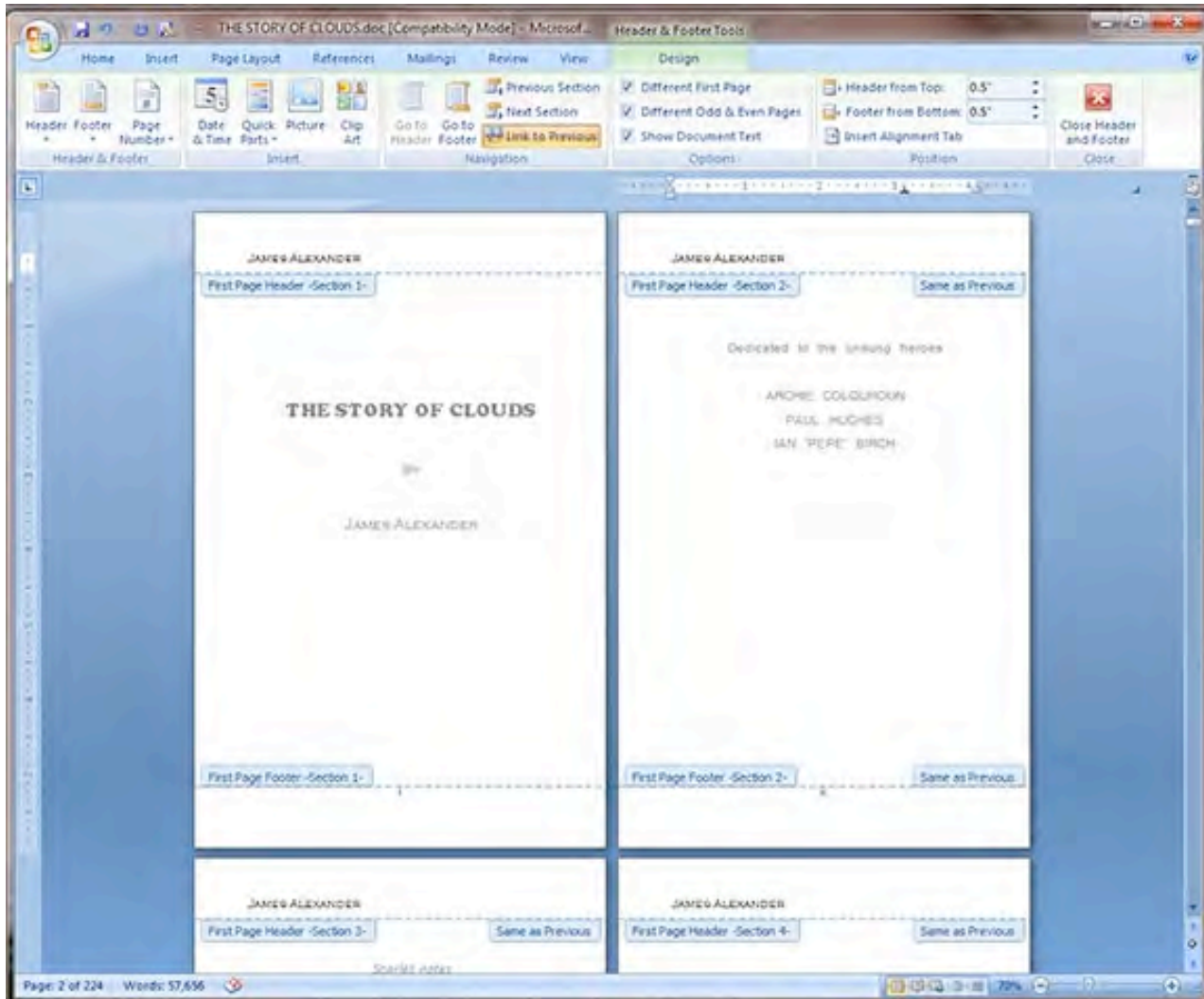


Figure 43

45. Select the author's name at the top of the first page. (Figure 44)

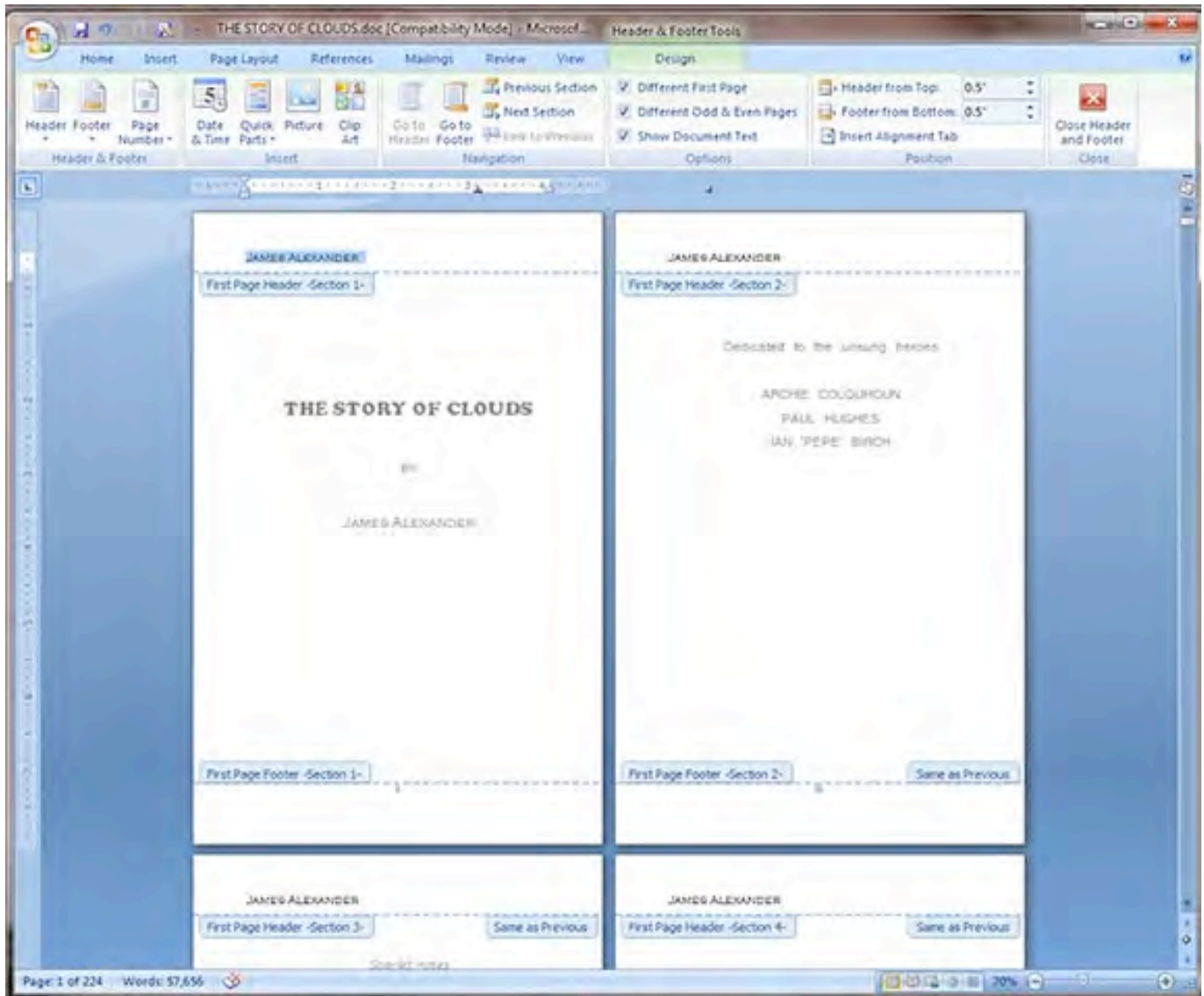


Figure 44

46. Delete the author's name at the top of the first page. Notice that the author's name has remained on the other pages. This is because the Link to Previous button was deselected on the page that follows it. (Figure 45)

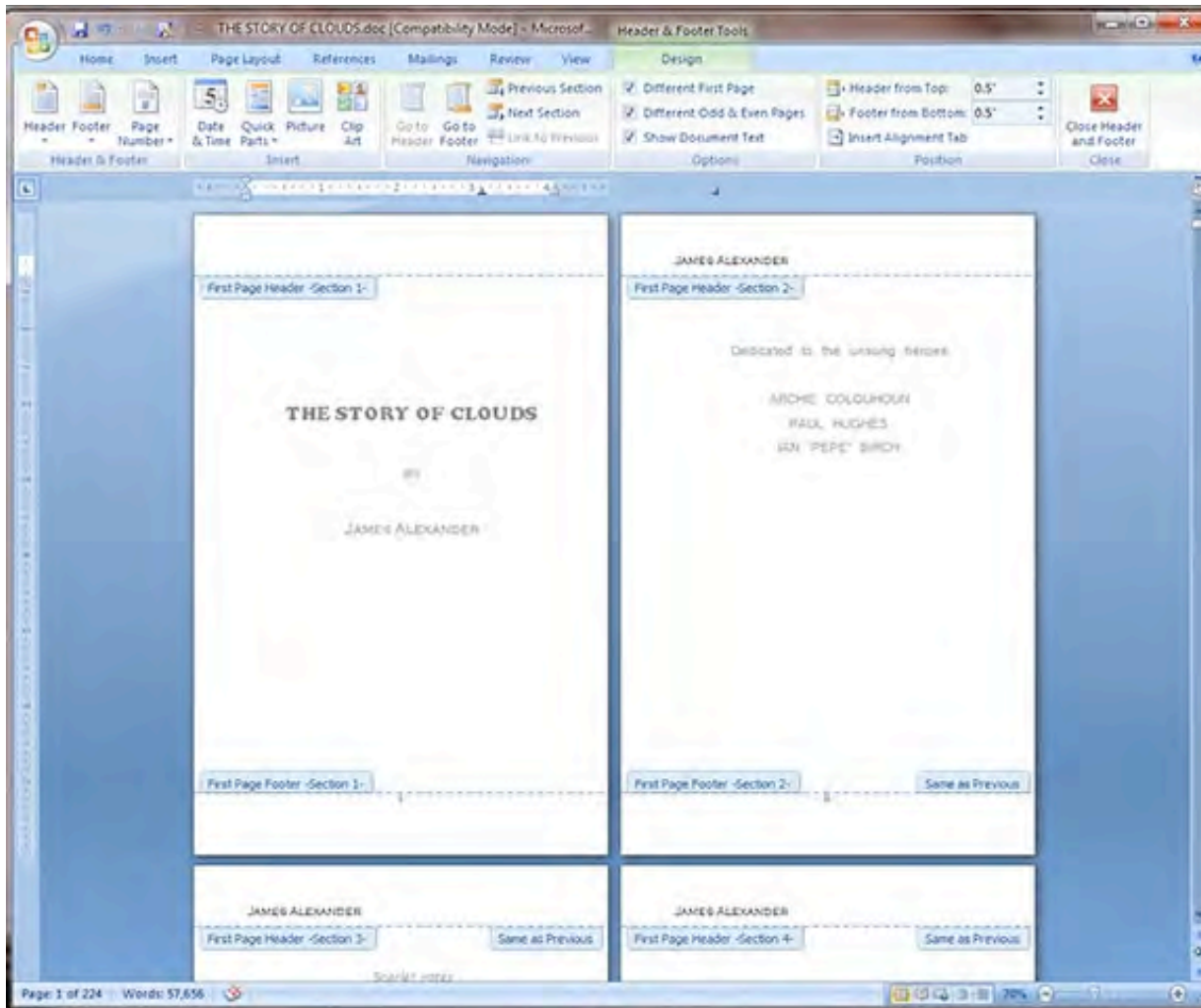


Figure 45

47. Now we want to set up the headers with the book title on the left pages. Select the author's name on page 3. (Figure 46)

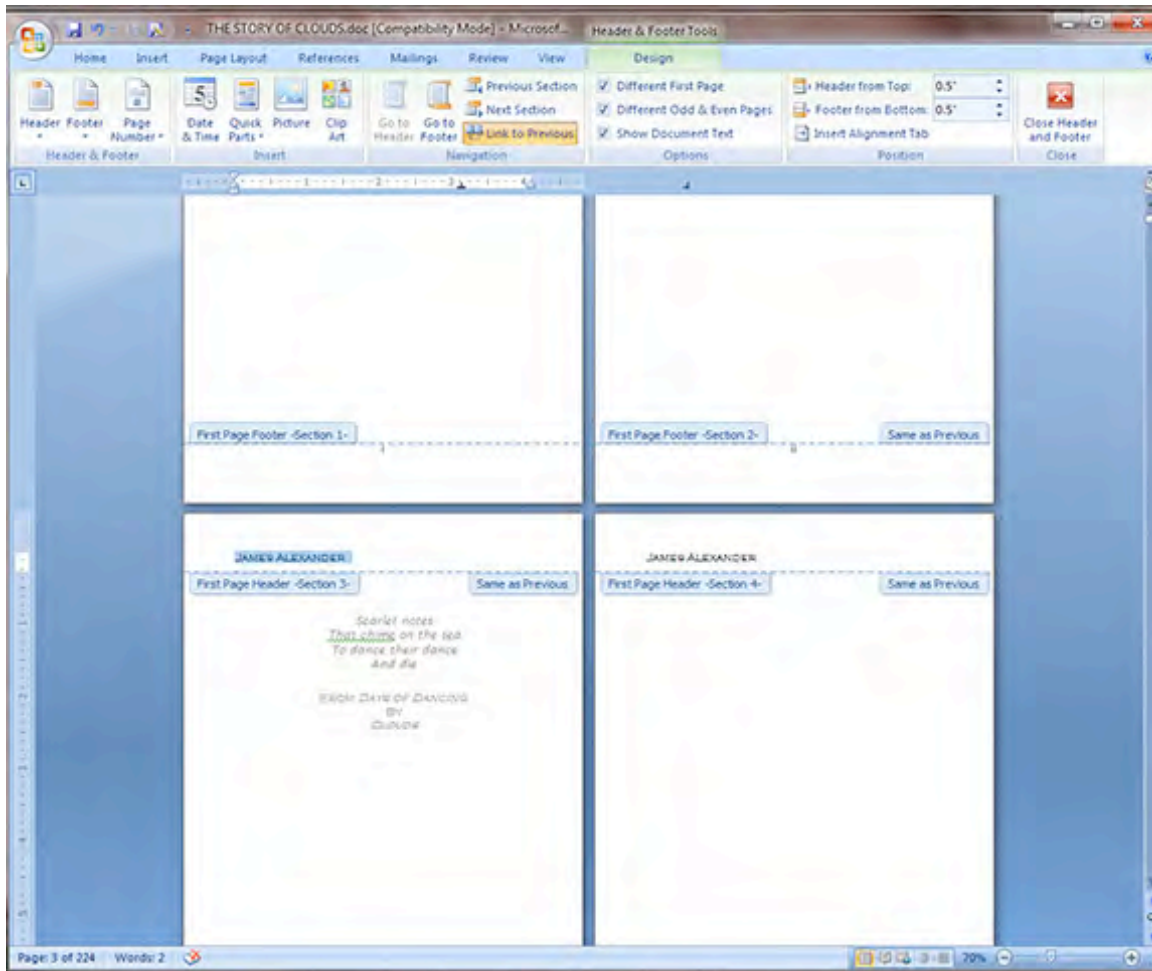


Figure 46

48. Click the Link to Previous button in the Header & Footer Tools panel to deselect it. (Figure 47)

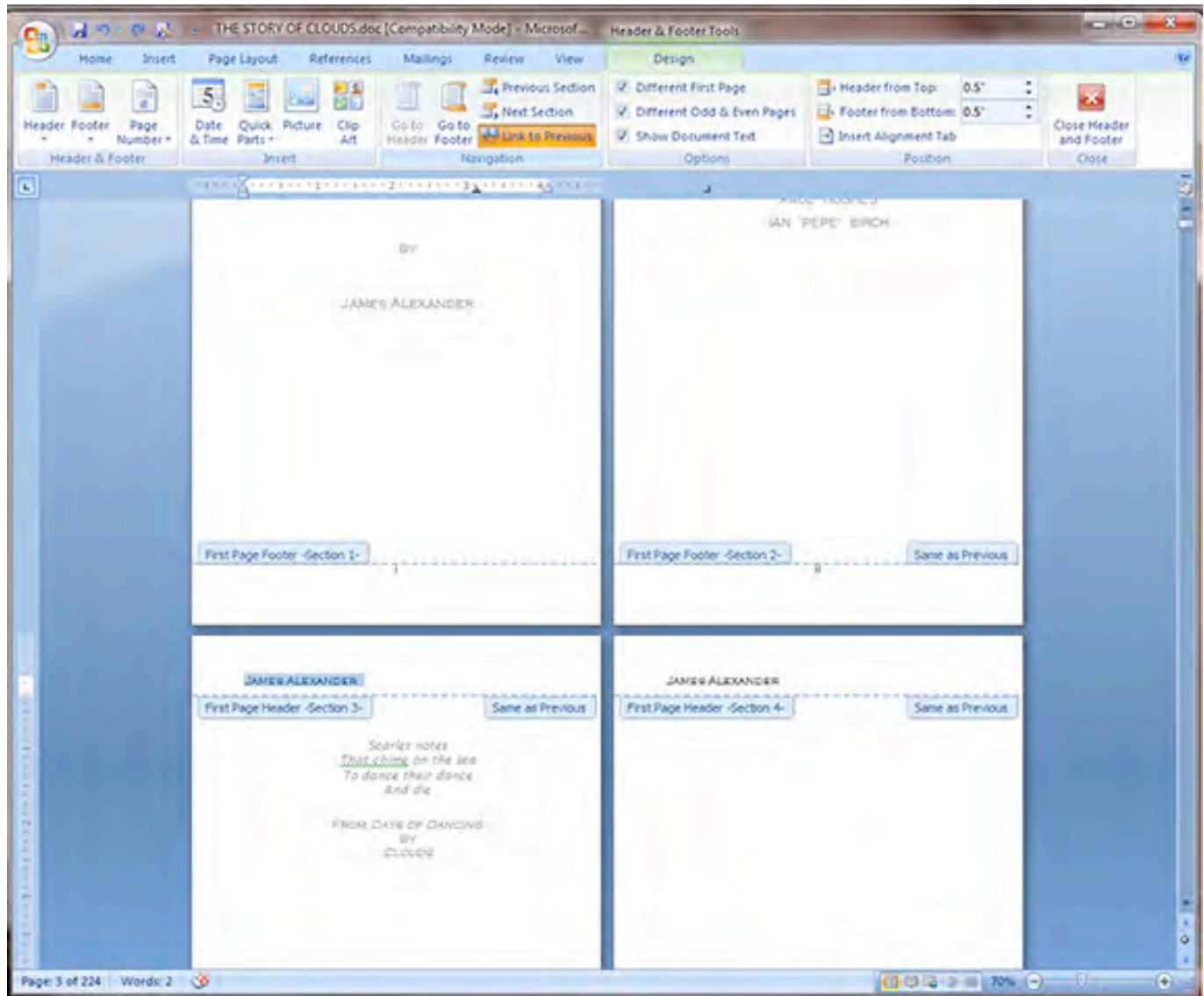


Figure 47

49. Our goal is to delete the author's name on page three, but we must make sure that when we do so, it doesn't affect headers of pages before or after that page. So now we will select the author's name on page 4, and we will deselect the Link to Previous button. (Figure 48)

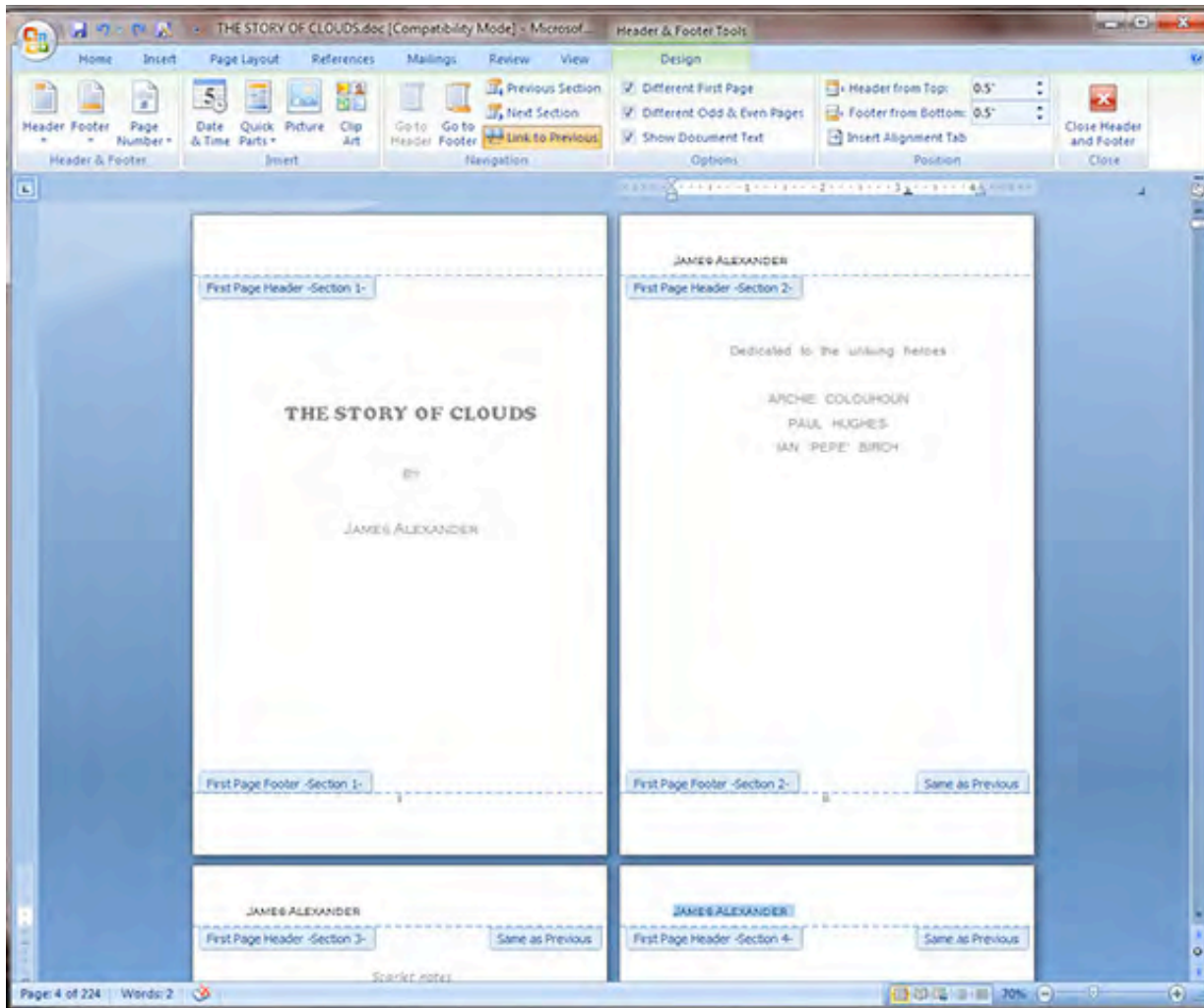


Figure 48

50. Now, delete the author's name on page 3. Select the Home tab and type in the title of the book using the same font formatting as the author's name on the even pages. Click on the Right Justify button to move the text to the right (Inside) edge of the page.(Figure 49)

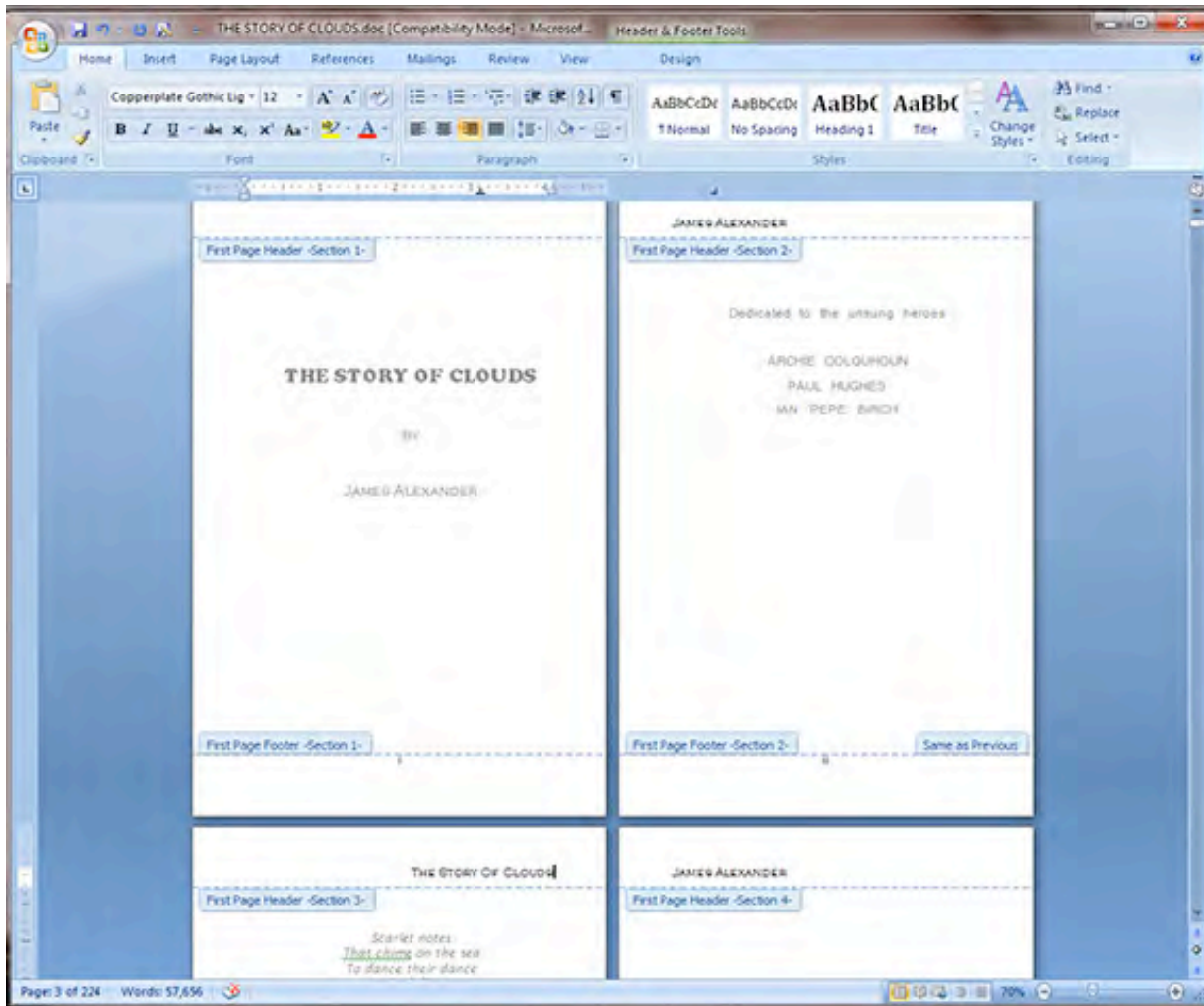


Figure 49

51. Notice on page 5 that the author's name is still on the left side of the page, and, in fact, is above the Table of Contents. For aesthetics, you will want to have no headers above some pages. These pages would be the Table of Contents, the initial page for chapters, pages with only images, blank pages, and so on. Select the Header & Footer Tools tab. (Figure 50)

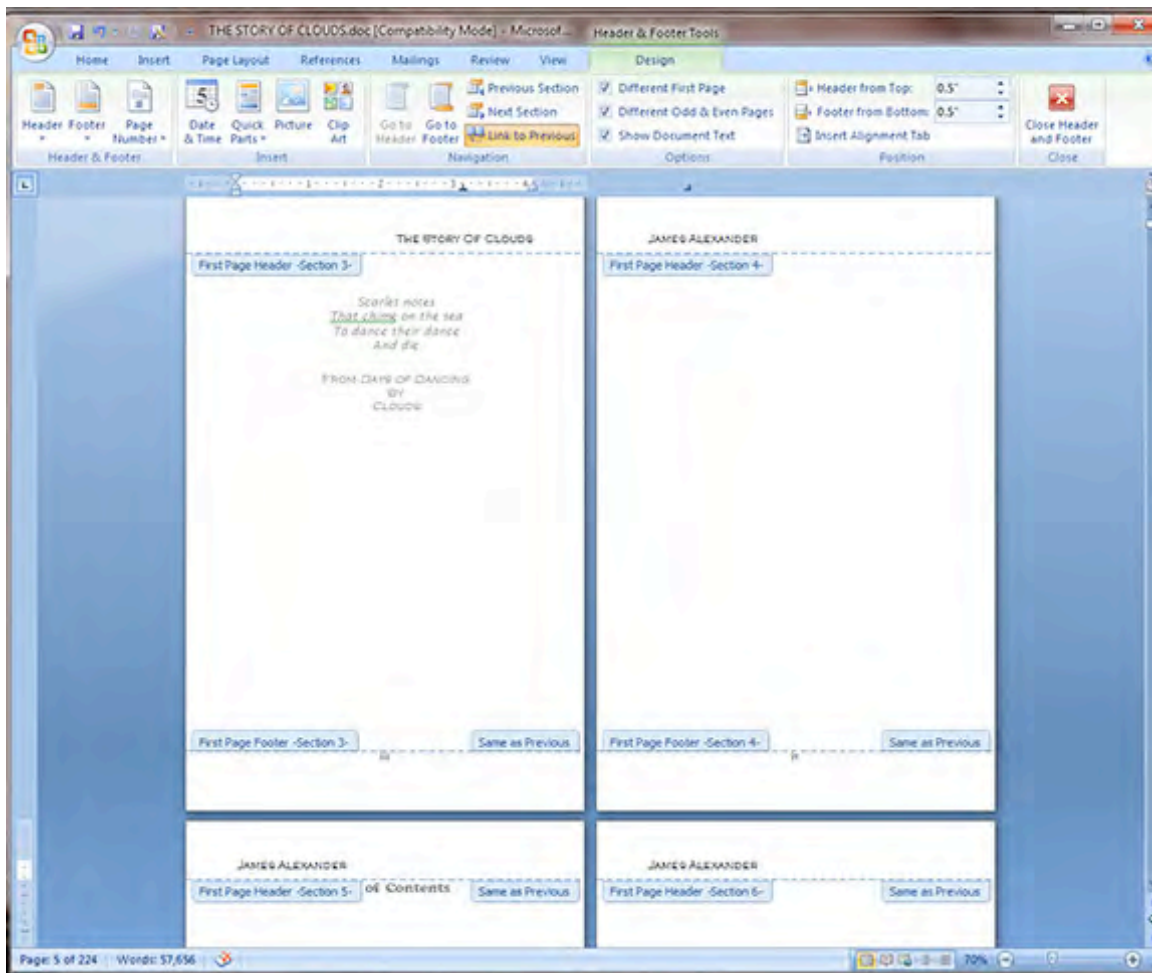


Figure 50

52. To remove the header text above the Table of Contents, select the text and deselect the Link to Previous button. Don't delete the text yet. (Figure 51)

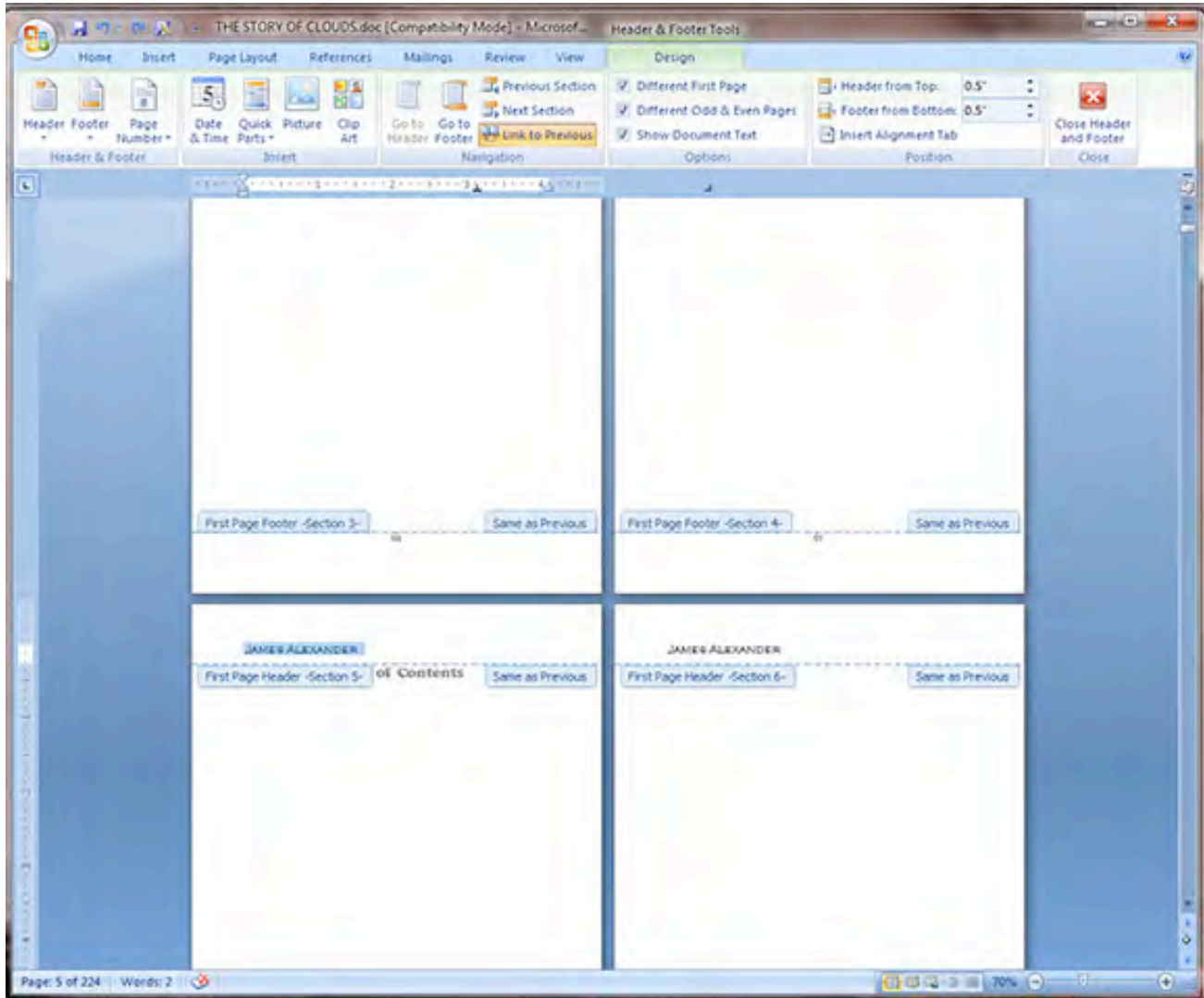


Figure 51

53. Next select the text above page 6 (The page that follows the Table of Contents page), Deselect the Link to Previous button. (Figure 52)

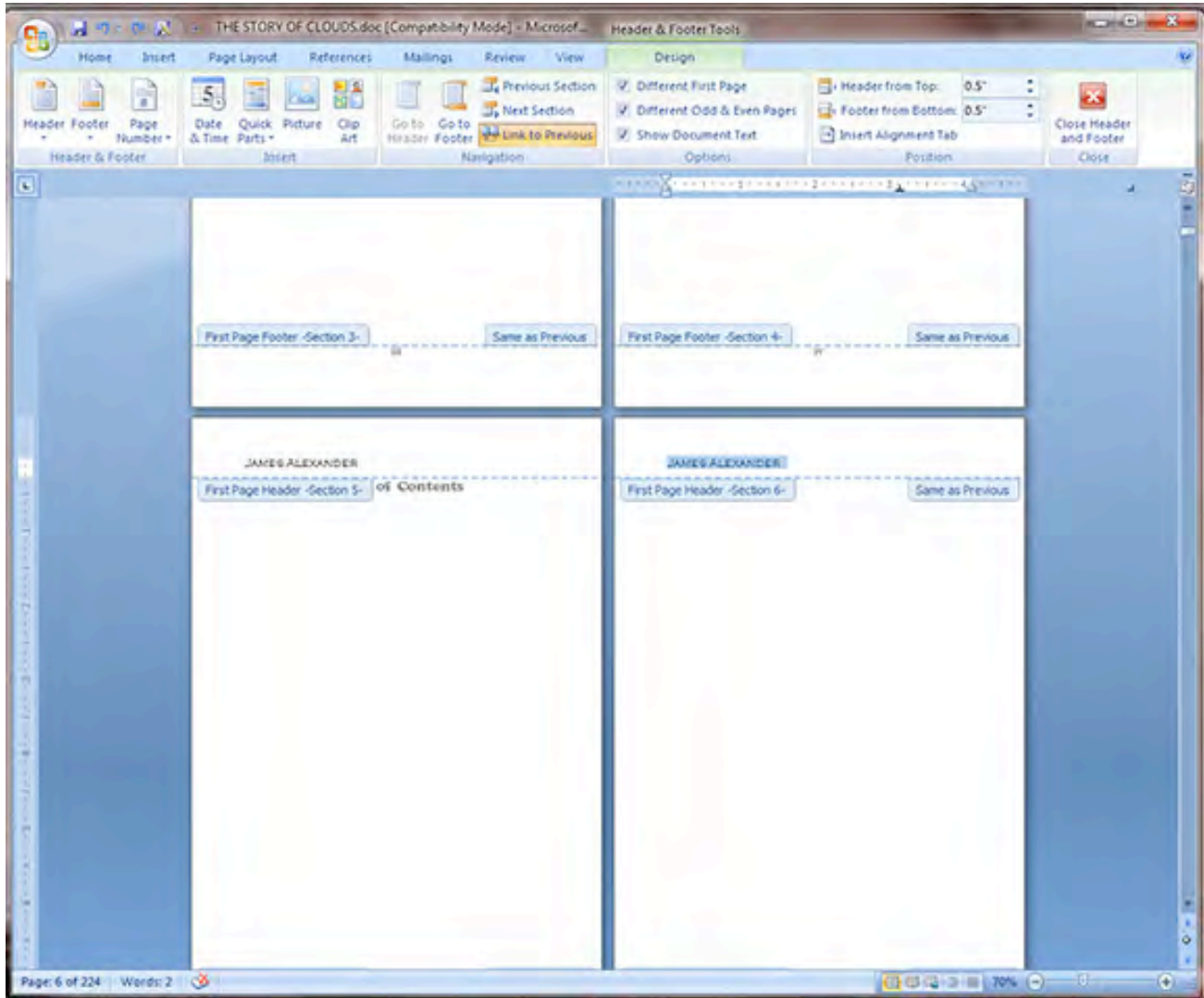


Figure 52

54. Now go back and delete the text above the Table of Contents (On page 5). Notice that no other pages have been affected (Figure 53)

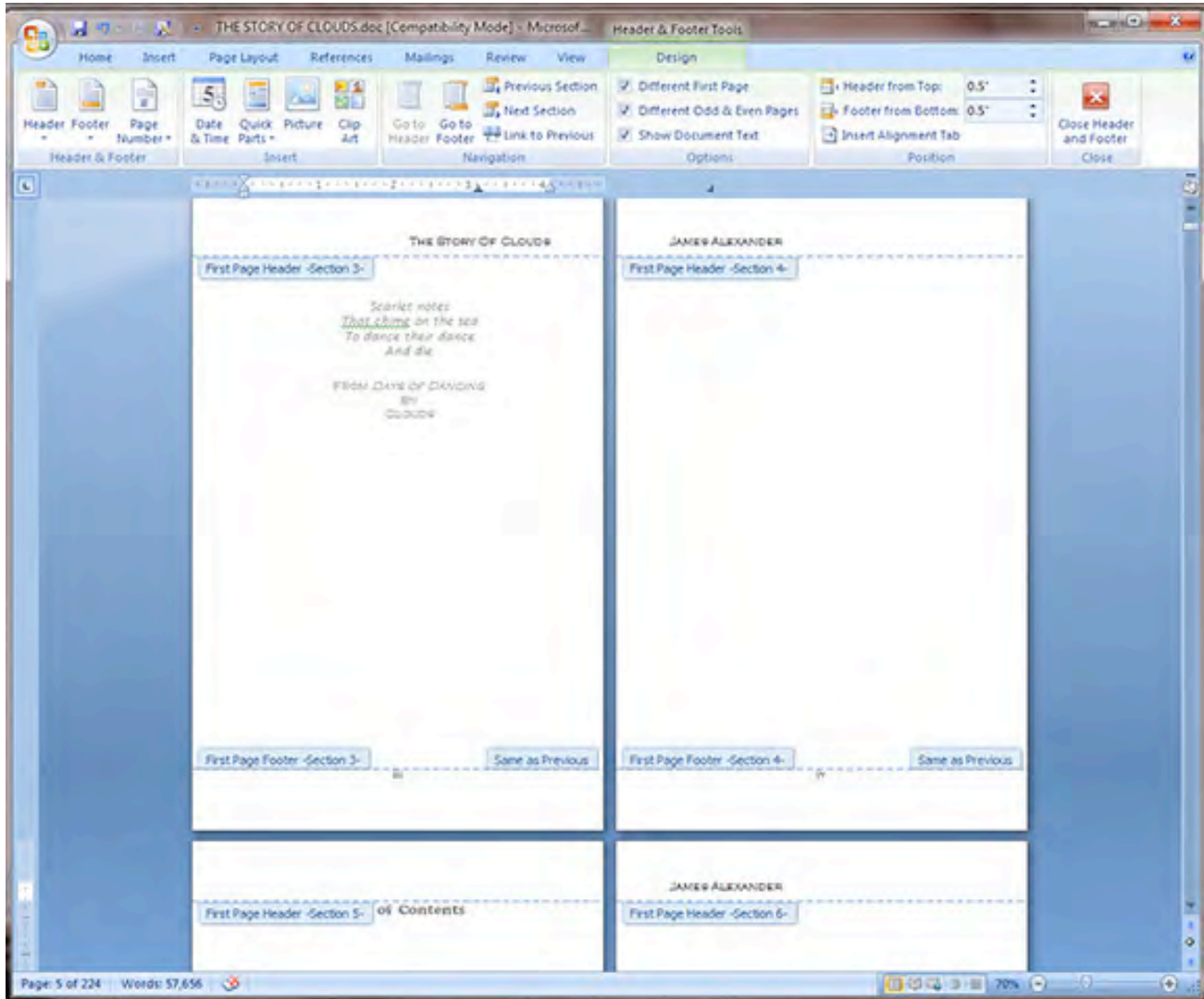


Figure 53

55. Let's proceed to the first "Chapter" page, which in this case is the beginning of the Introduction section. (Figure 54)

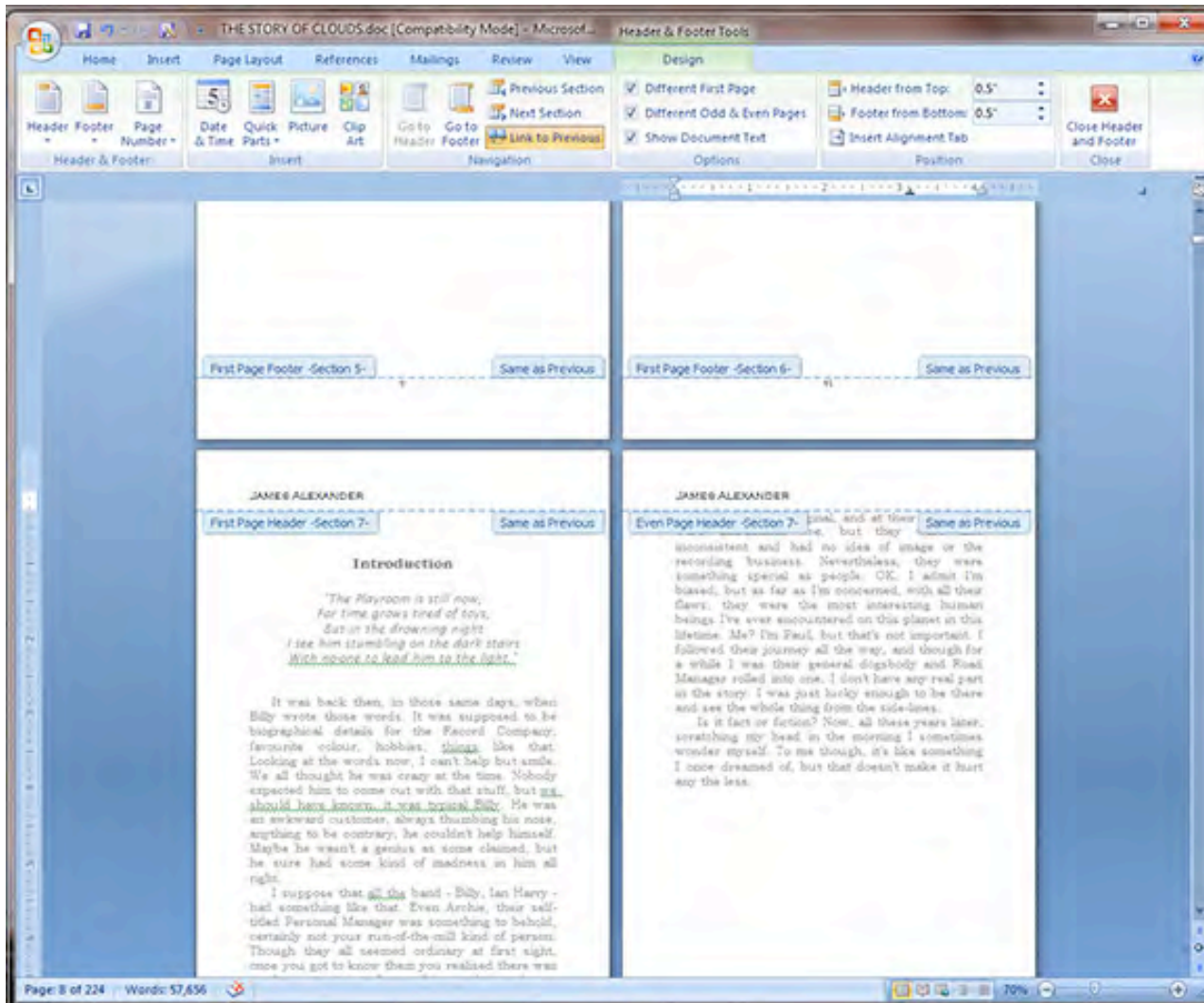


Figure 54

56. Select the text above the Introduction page. Deselect the Link to Previous button. You may have to do this also on the following page. (Figure 55)

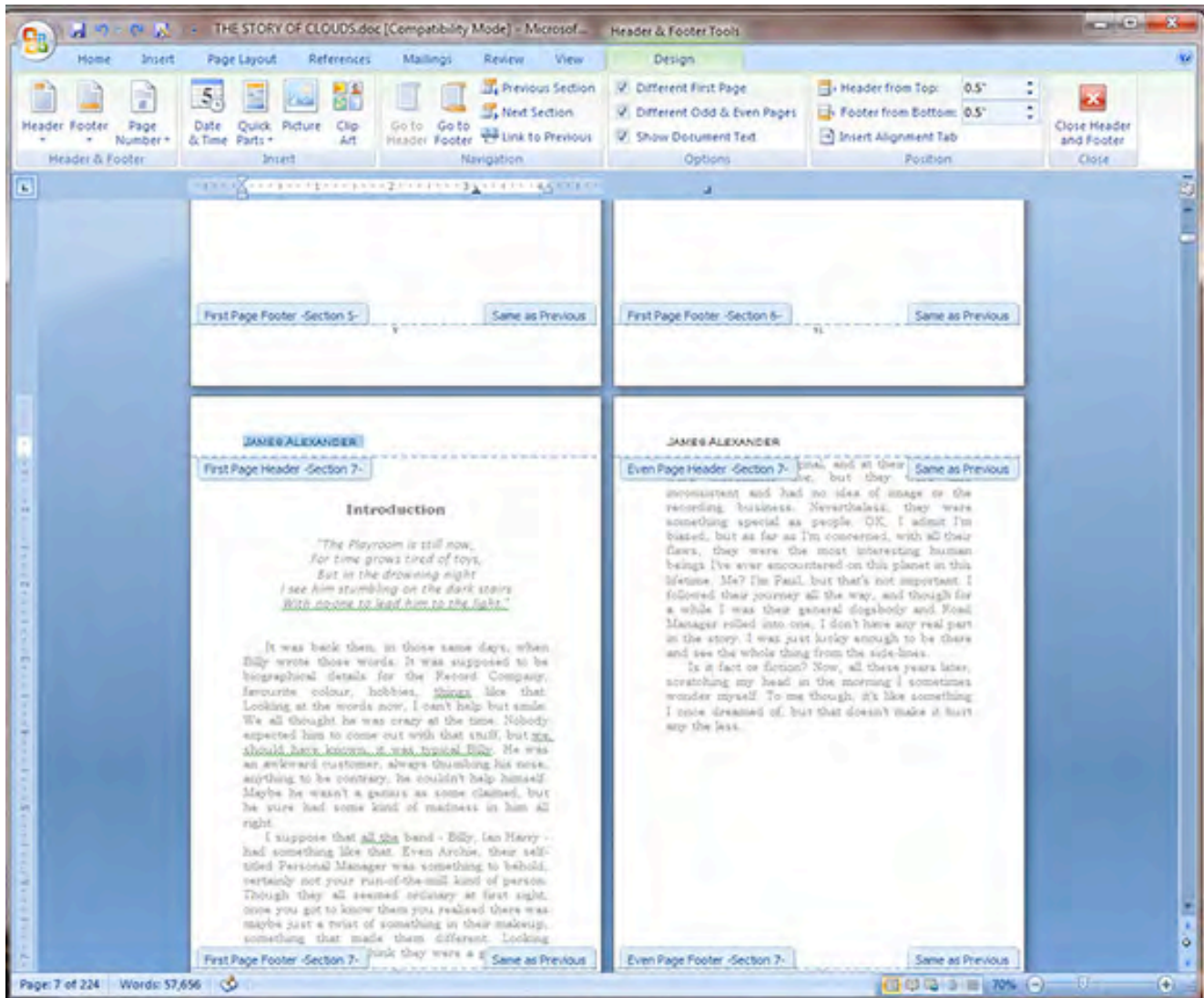


Figure 55

57. Delete the text above the Introduction page. (Figure 56)

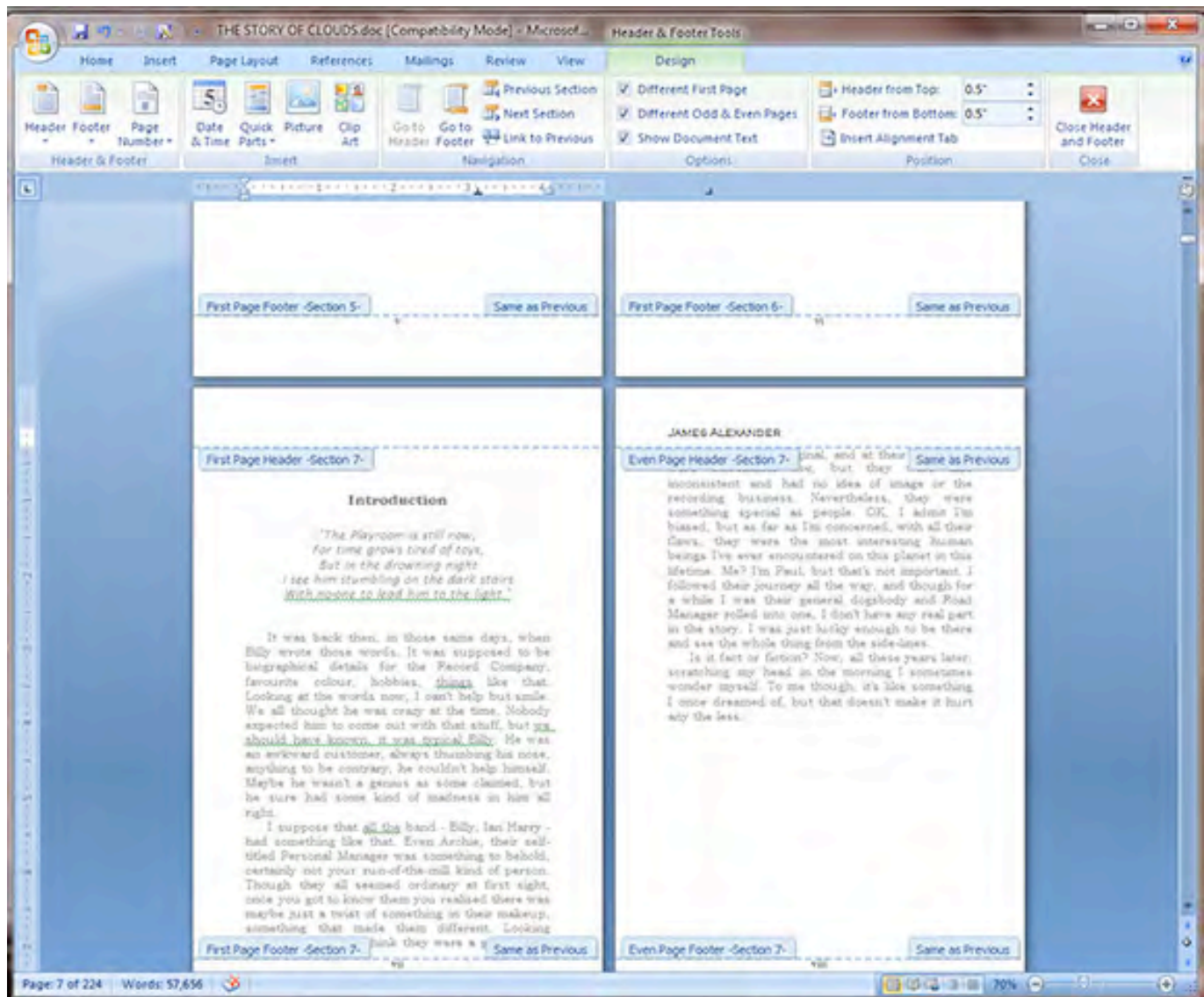


Figure 56

58. Proceed to the next chapter, Chapter One in this case. Notice that the file has been “Trained” to not show headers above the “Chapter” headings. (Figure 57)

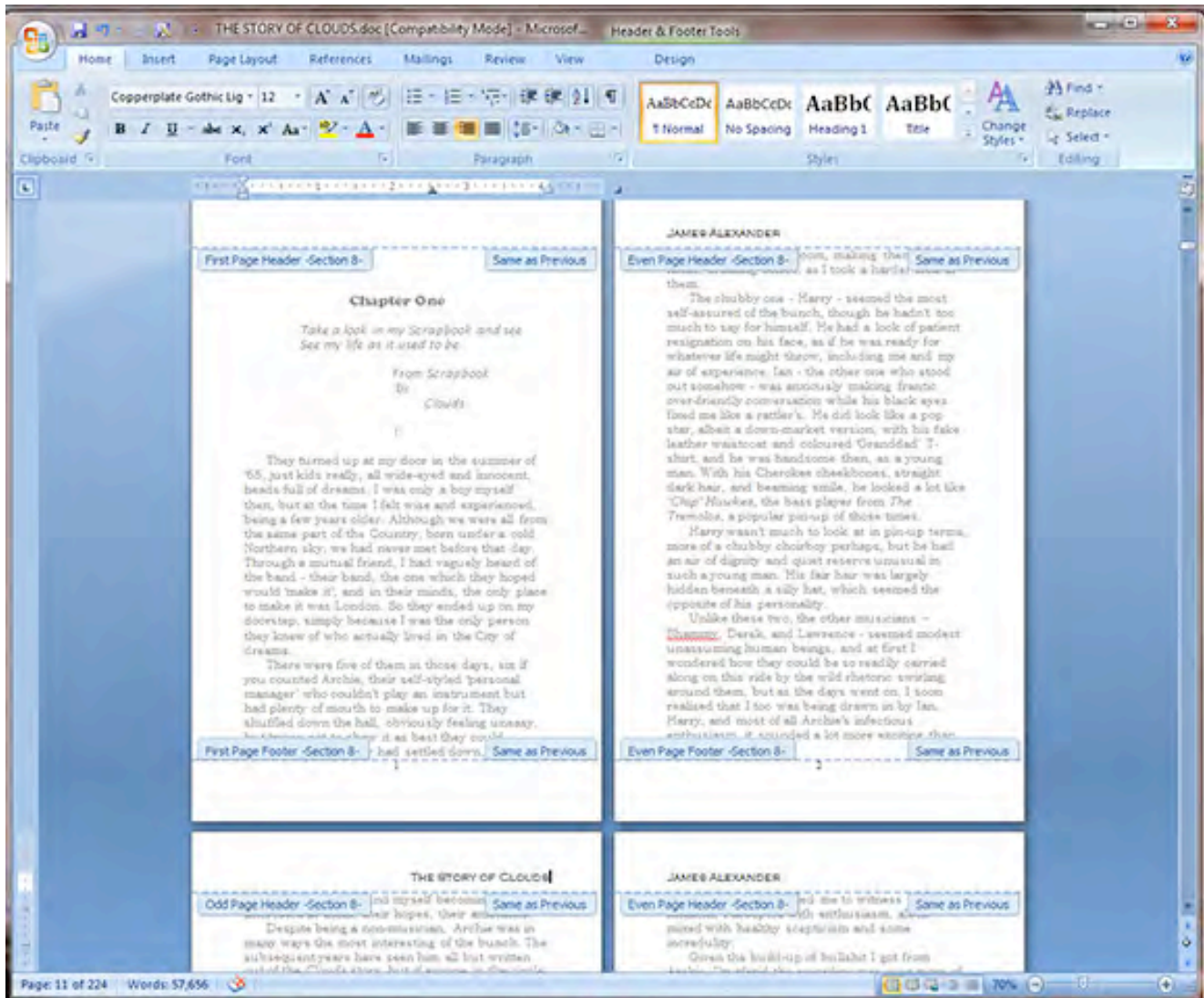


Figure 57

59. Check later chapters to make sure that the pattern is continuing. Chapter Four look fine. (Figure 58)

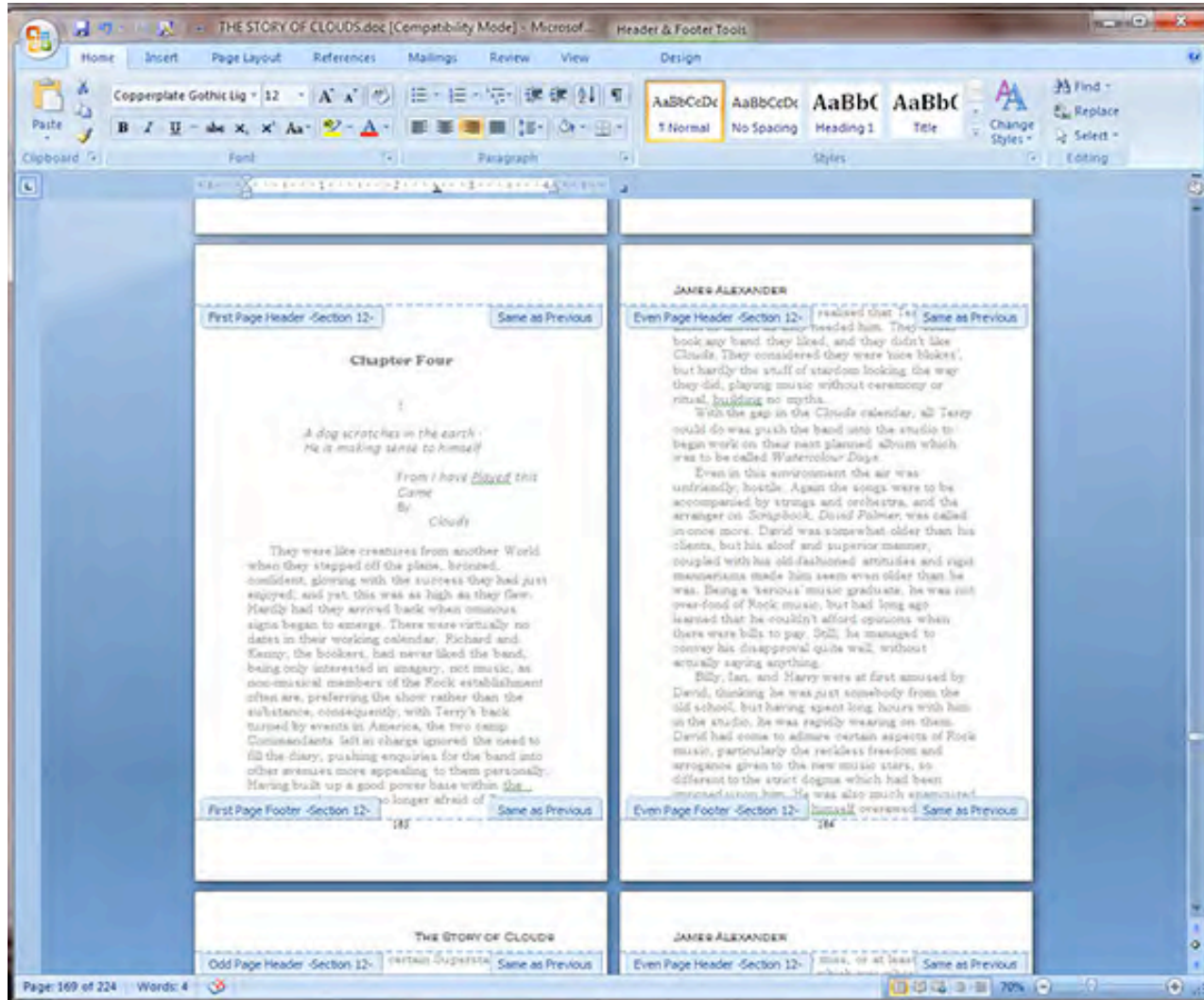


Figure 58

60. Next step, go back to the Table of Contents and add the chapter titles. Note, there is a method for automatically creating and paginating a Table of Contents, but this will not be discussed here. This is a simple book formatting tutorial for a simple book. And, this book will later become an eBook, and adding the automatic TOC creation now will only create a fair amount of work that will need to be done later when formatting the eBook file. (Figure 59)

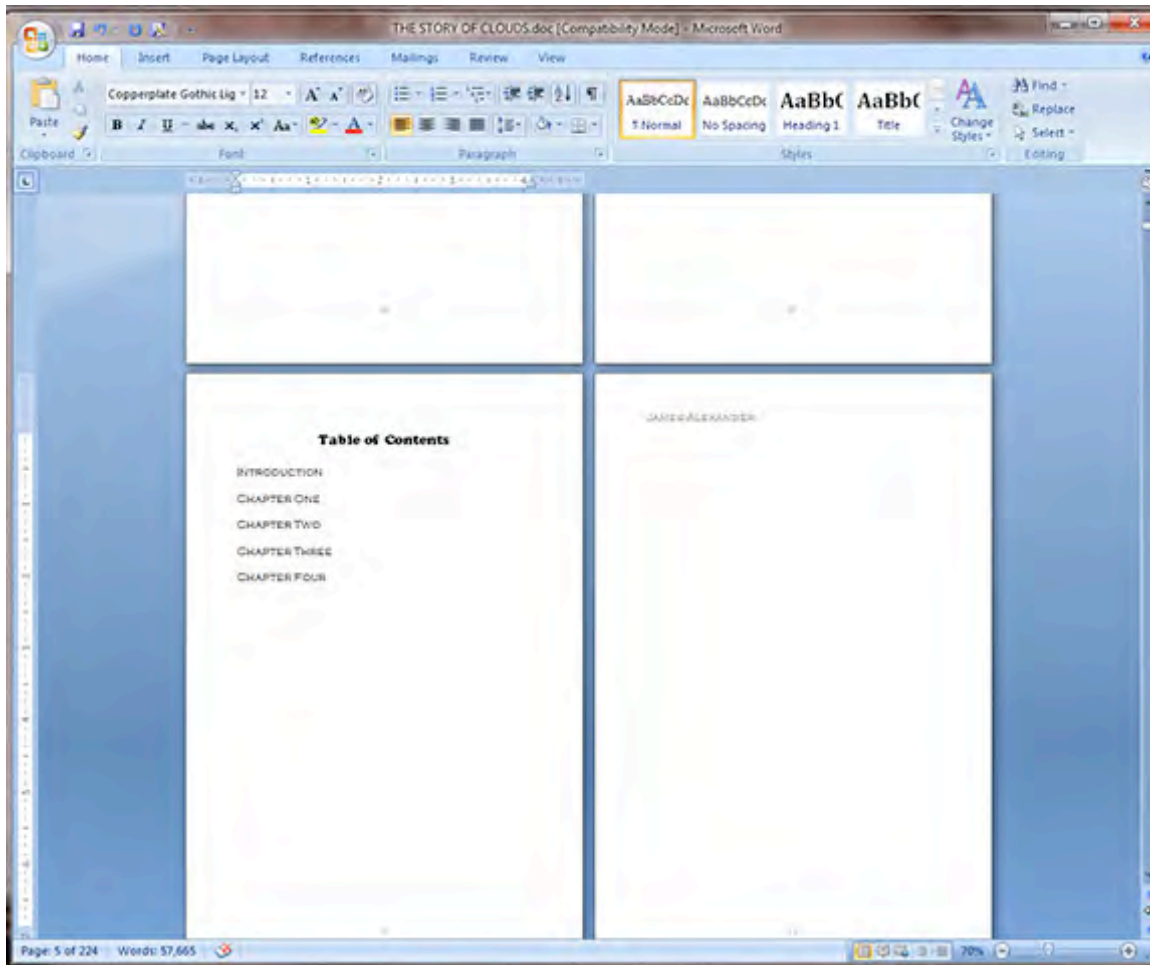


Figure 59

61. We will want the title and pagination spacing to be neat in the Table of Contents. Here is a simple technique. Select all of the chapter headers in the TOC. Right Click on the selected text, drop down and click on Paragraph. (Figure 60)

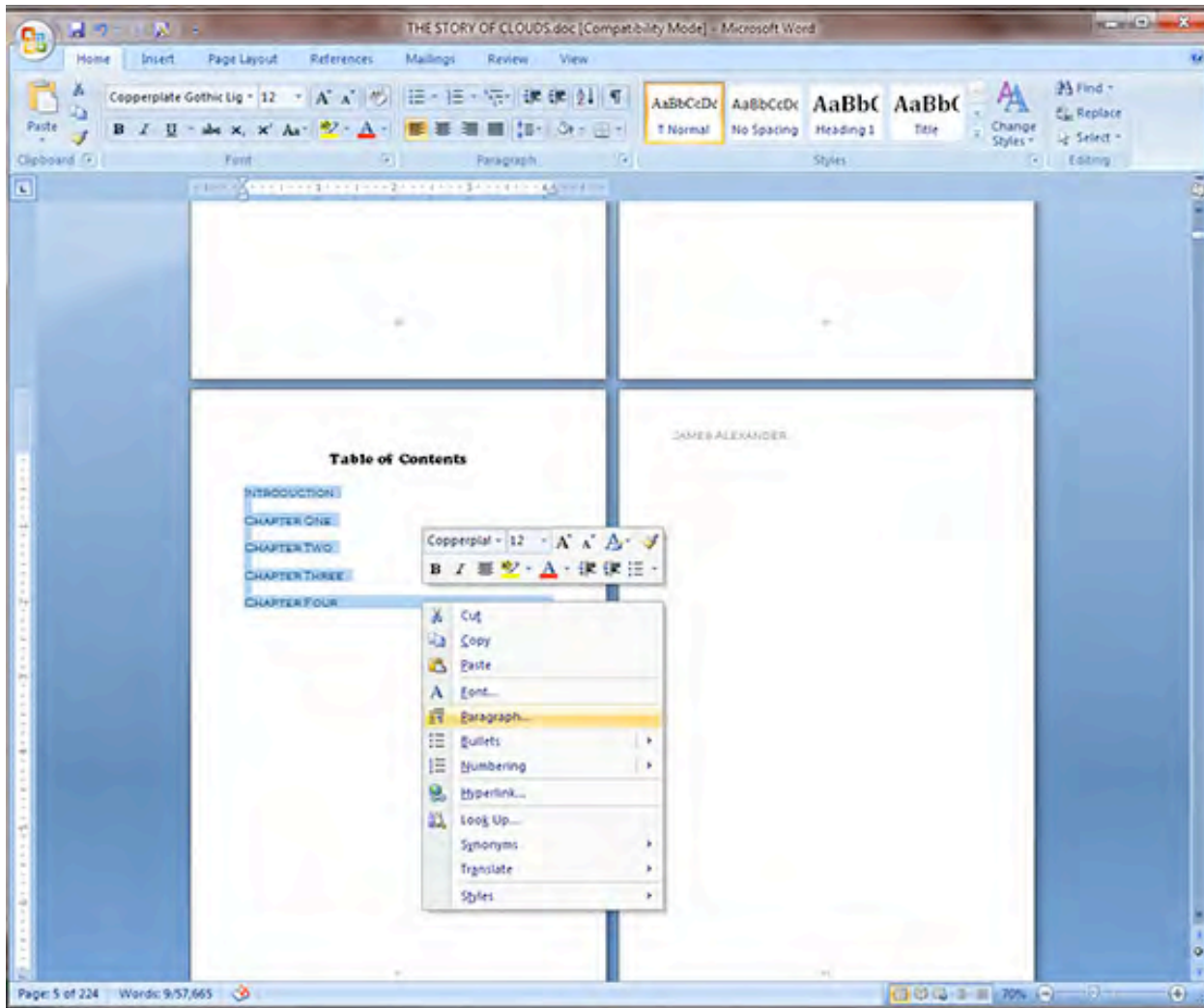


Figure 60

62. The Paragraph window will open. In the Line and Page Breaks tab, click the Tabs button at the bottom left of the window. (Figure 61)

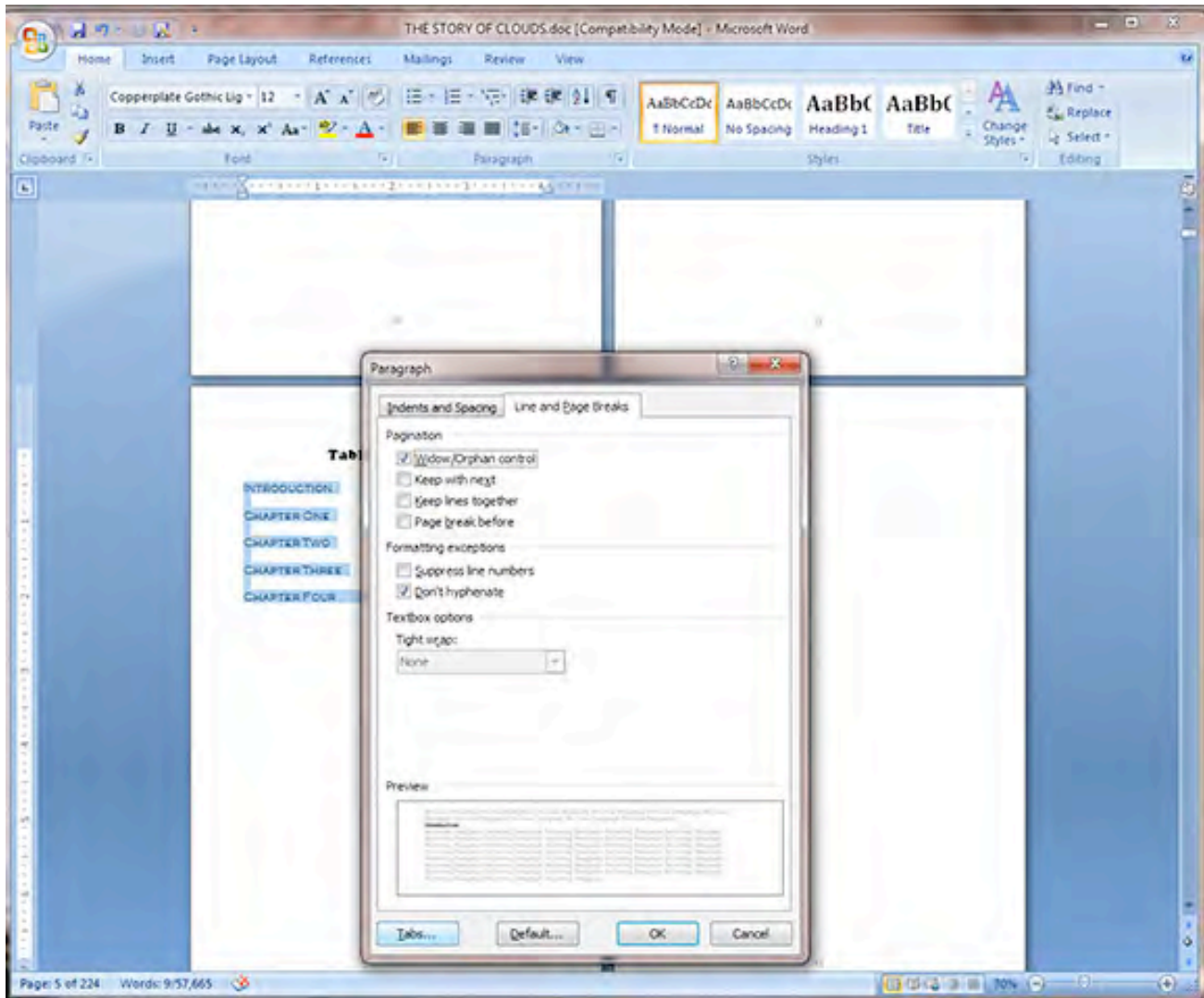


Figure 61

63. The Tab window will open. Under Tab stop position type on a number that will place text near the right most portion of the printable area of your document. In this case, the best value would be 4. See the 4" in the ruler above the document. (If your ruler is not visible, you may want to turn it on in the View drop down at the top of the window). Then click on "Right" under Alignment, and we click on "2....." under Leader, although any choice can be made according to preference. (Figure 62)

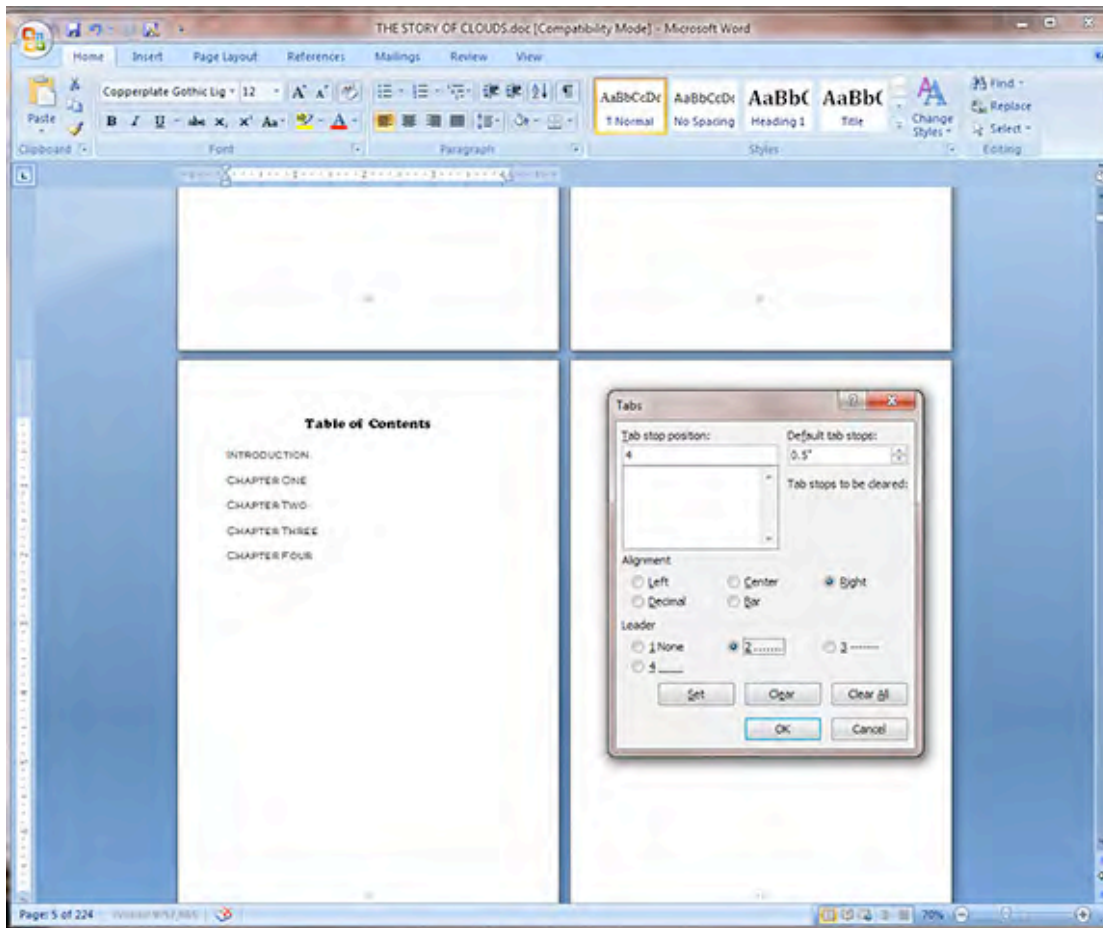


Figure 62

64. Type in the first page number value to the right of the first chapter. In this case, vii next to INTRODUCTION. (Figure 63)

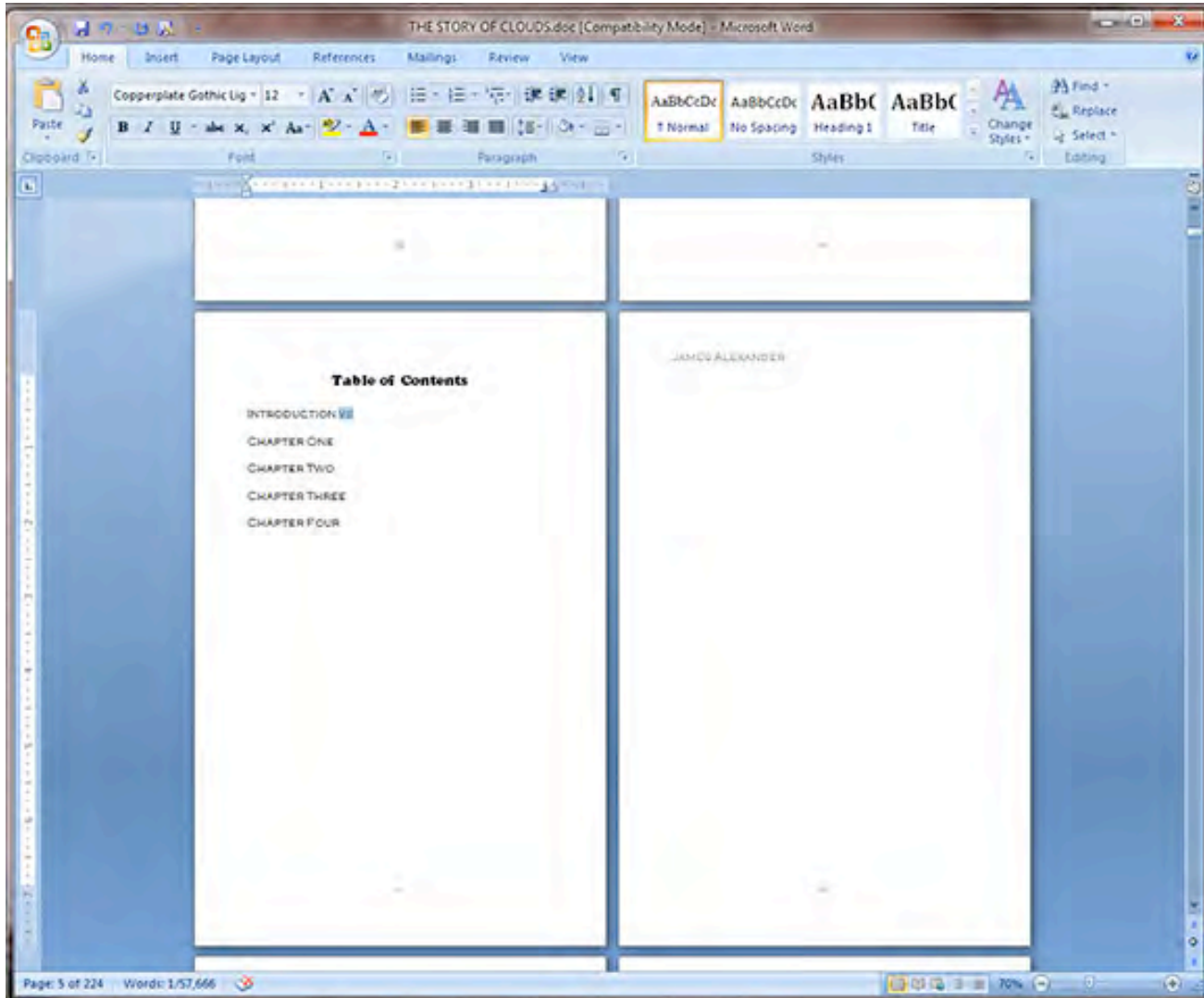


Figure 63

65. Place an insertion point to the left of the page number, and push the Tab key on you keyboard. Notice that the page number has moved neatly to the 4" spot on the page and is now preceded by ".....".(Figure 64)

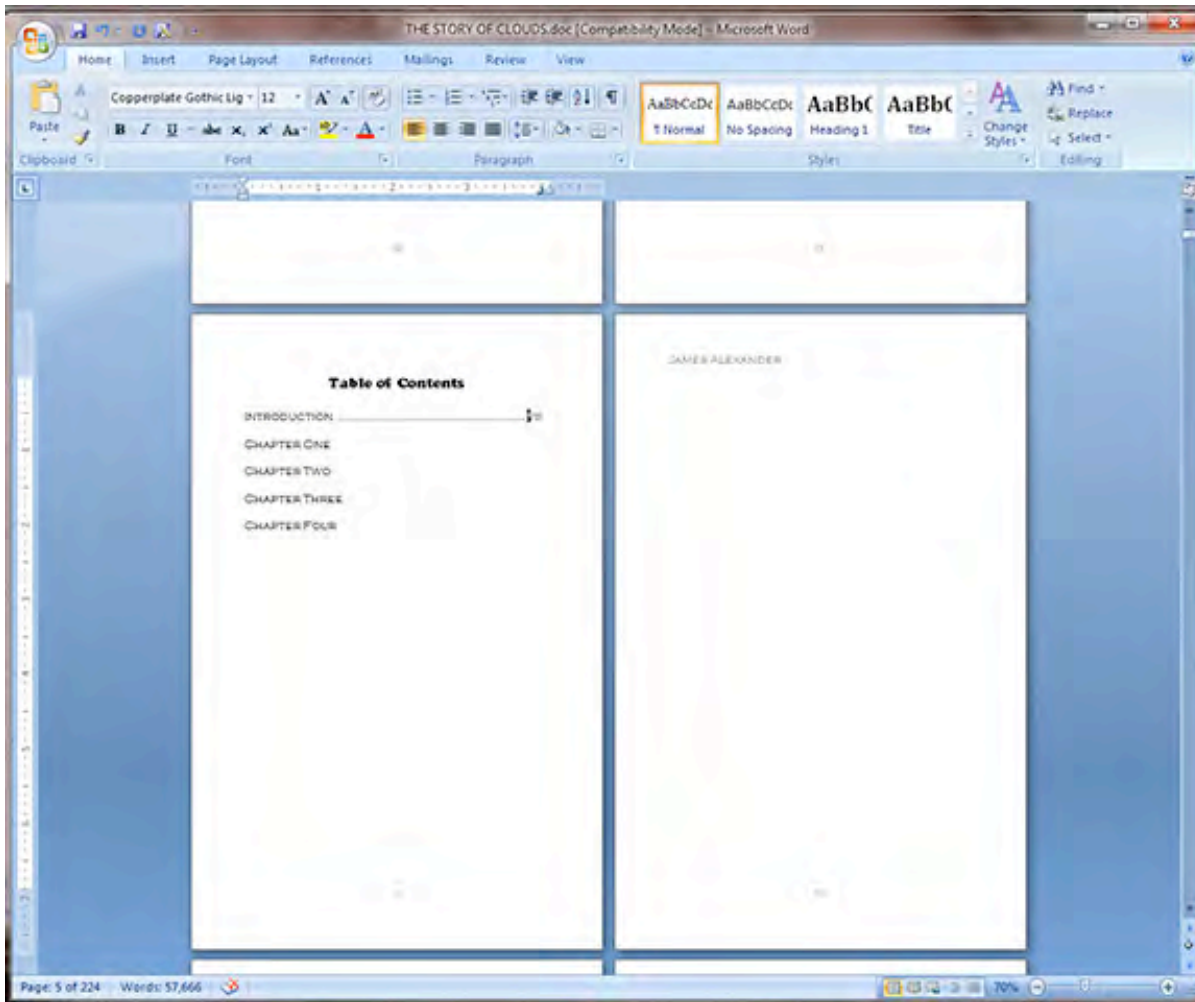


Figure 64

66. Follow this procedure for the remaining chapters. You will have to read through you book, noting the actual page numbers to find the values for the chapter pagination. (Figure 65)

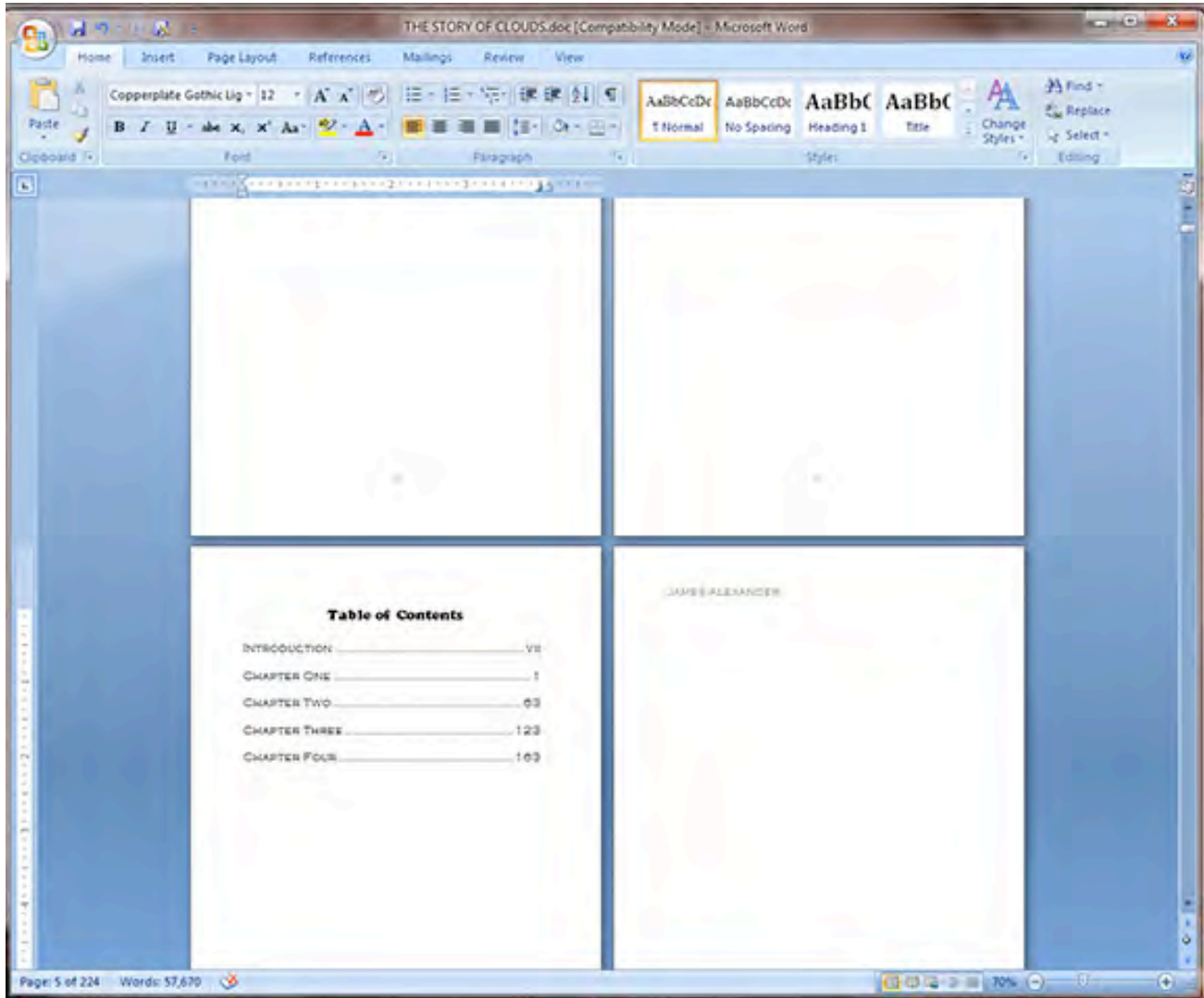
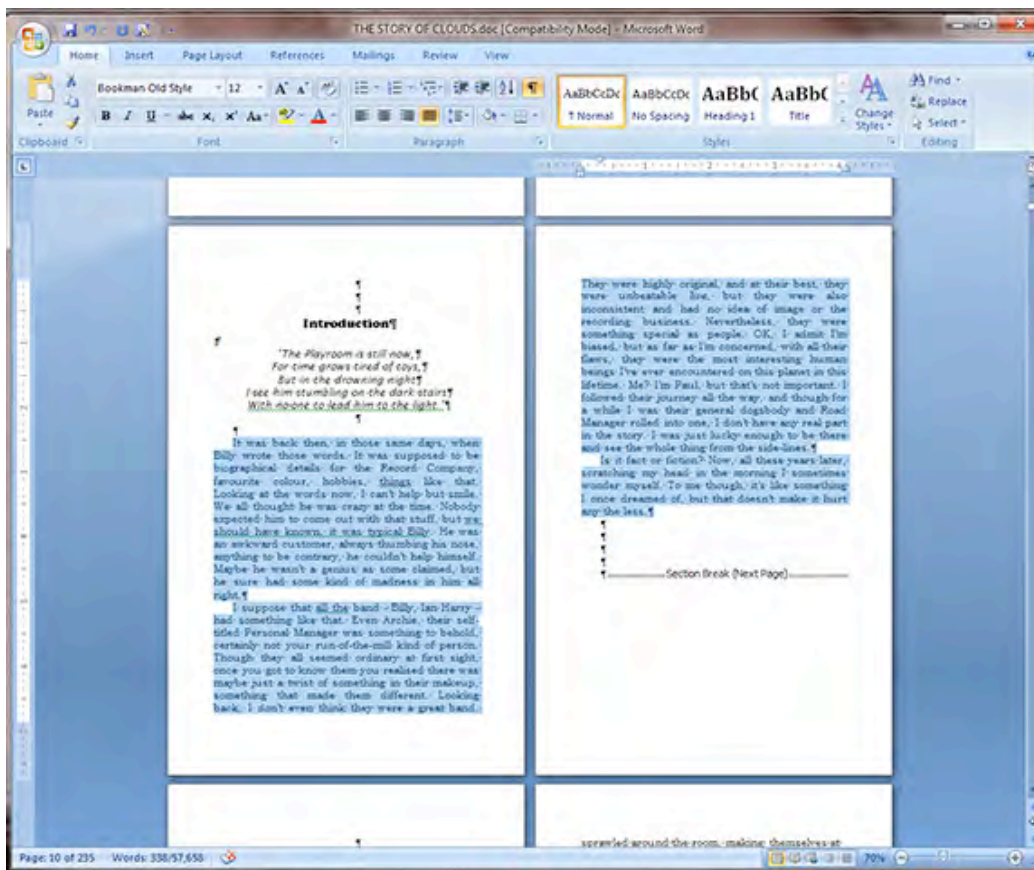


Figure 65

Justifying your book's text

There are several ways to justify the text in a book. Click on the Home tab at the top of the screen. Notice on this page that the Introduction and lines that follow are “Center Justified.” This is OK for portions of the book, such as the beginning of a chapter, the title page, and so on, but you probably won't want to center justify the main text for your book. You will likely want to either “Full Justify,” or “Left Justify” the text. To “Full Justify” select the text that you would like to affect, and click the right-most justification button in the Paragraph section. Do not choose the entire book file to make this change unless you would like to justify all text the same.



Or, you can “Left Justify” your text by selecting all text that you would like to affect and click the left-most justification button in the paragraph section. Finally, to center portions of text, select it and choose the middle-most button under the Paragraph section. Notice that you can also right-click on selected text and drop down and click Paragraph to find these settings. This is the page with centered title, and quote at the top, and “Left Justified” text.

