

THE BOOK BLOCK

FORMATTING AND SAVING
Microsoft Word



This program is funded in part by a grant from the U.S. Institute of Museum and Library Services and Texas State Library and Archives Commission. (2018)

Formatting Checklist

** indicates required*

- Apply Section Breaks
- Adjust Margins*
- Apply Gutter*
- Apply Mirror Margins Option*
- Adjust Margins*
- Select Paper Size to Match Book Size*
- Apply Page Numbers
- Adjust Line Spacing
- Insert Images
- Apply Page Breaks
- Add or Delete Pages for Even Page Count *
- Save as a PDF/A*

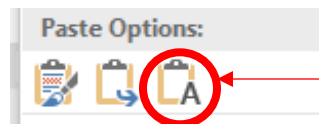
Process Overview

You have your manuscript typed up in MS Word. Great! Now we are going to format it so pages are the right size and the content is well positioned. You will start with select a font and move on to formatting the page sizes

Open the Template in MS Word

This guide will also help you format an existing Word document and working with one of our templates from friscolibrary.com/trailblazer. Both transferring content to a template or re-formatting an existing Word document are similar in terms of time and effort.

When copying and pasting into our template, you will want to paste using the “text-only” option.



Tools to Always Use

Always use the following tools when creating your document. If you *do not* use these tools, differences in layout can occur between the on-screen word processor and the printed book.

Align Text

- **Avoid** using the space bar to position text on a page.

Use your **text alignment tools**:



New Page

- **Avoid** using pressing enter key to add blank lines to move to a new page.

Use **Page Break** Tool:



Insert Images

- **Avoid** cutting and pasting an image into the document.
- **Avoid** dragging and dropping an image into the document.

Use **Insert Picture from File** from the Insert Tab.



Font

Font type and size is a personal choice. Many authors at this point like to to change the font of the document and as they review the layout of each page make small adjustments.

Common Font Sizes: 10 to 12 point

Common Font Types: Garamond, Times New Roman, Arial, Veranda, Tahoma

Common Line Spacing: 1.15 to 1.25

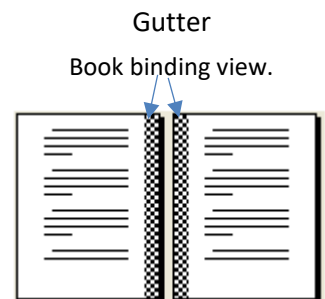
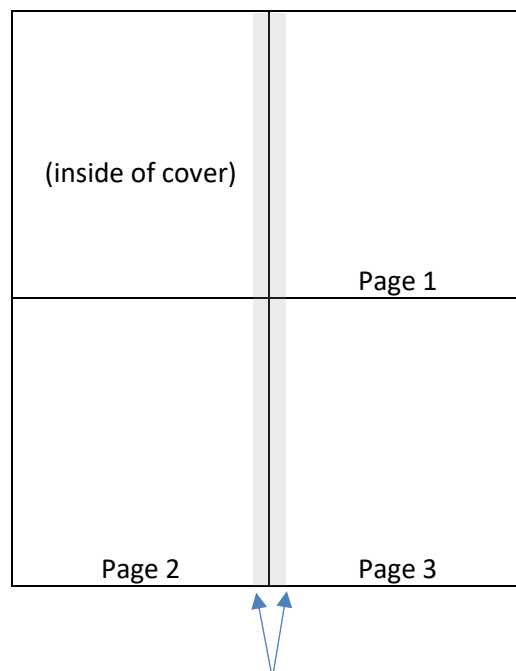
Avoid single and double spacing.

Example fonts are all 11pt size.

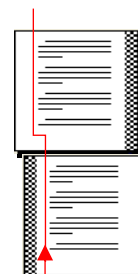
Notice some font types appear larger than others.

Notes on Layout:

Page 1: When a book prints, the first page will be on the right hand side. Odd pages will fall on the right hand side and even on the left. The inside of the cover that wraps the Book Block is always blank. So while in Word your first page will appear on the left, when it prints it will be on the right. This can be important if you are expecting the content of two pages to both be visible as a two page spread.



Single page word processor view.



Gutter: Area where additional margin space is added (left for odd pages, right for even pages) so that text stays visible after a book is bound. This causes your margins to look misaligned as you scroll down between odd and even pages in your word processor. However, that offset in alignment is necessary for the binding of the book.

START HERE

Open your manuscript in MS Word or paste your text into one of our MS Word templates from our website: friscolibrary.com/trailblazer. Reformatting your existing document takes about the same amount of effort and steps.

1. Sections Breaks

[optional]

You will want to use section breaks to apply different formatting to each section of the Book Block. It is important to create the sections before applying headers, footers, and page numbering.

Examples of sections that may require different formatting or page numbering:

Front Matter

- Title page
- Series title page
- Dedication
- Copyright
- Table of Contents
- Foreword (Preface, Introduction)

Core

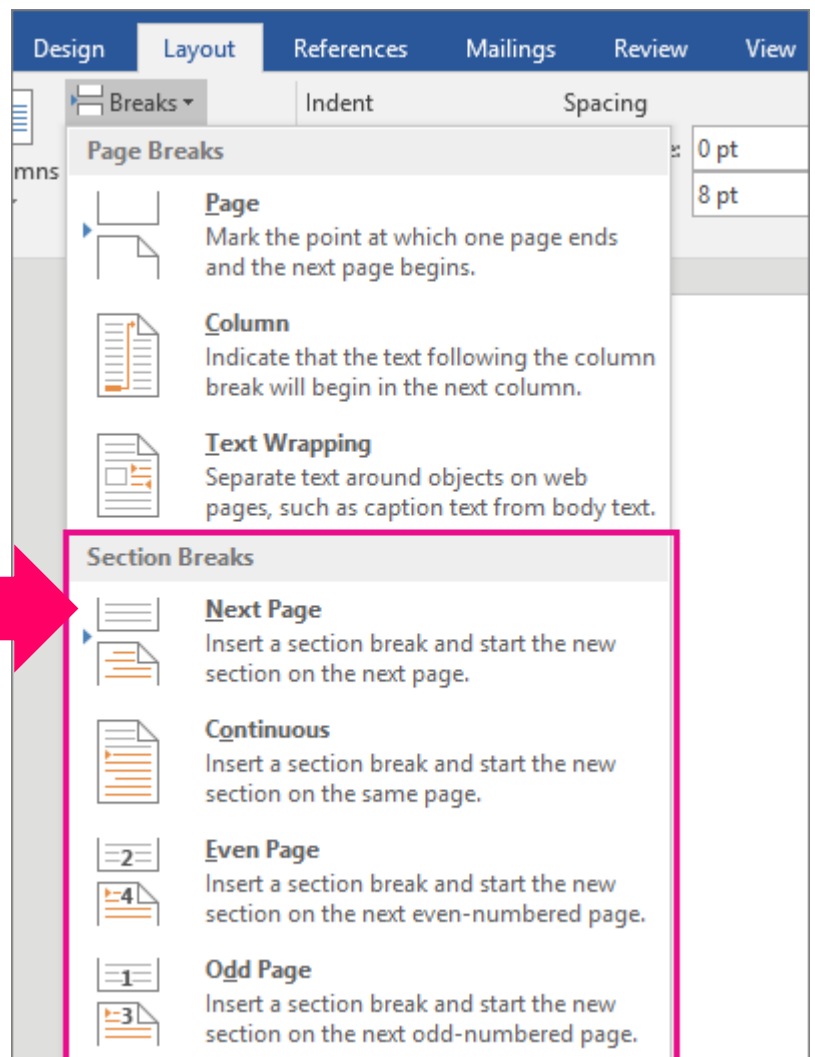
- Chapters

Back Matter

- Appendix
- Glossary
- Index
- List of Contributors
- References
- Resources

Add section breaks to your document if necessary.

1. Click on the end of the last page of a section.
2. Select the **Layout Tab**
3. Click on dropdown arrow next to **Breaks**
4. Choose **Next Page**
5. Repeat as needed.

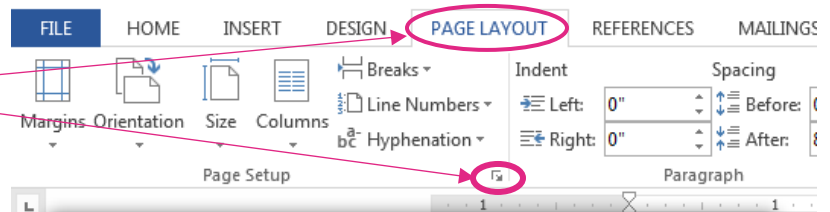


2. Page Setup

[REQUIRED]

You will need to format the margins and gutter. (See page 3 on why this is important)

Page Layout tab → Page Setup



Margins

Recommended: 1 inch margins

- Top 1 in
- Bottom 1 in
- Inside 1 in
- Outside 1 in

Margins must be greater than $\frac{1}{4}$ (.25) inches.

Anything that is $\frac{1}{4}$ inch or closer may be trimmed off in the binding process.

Gutter

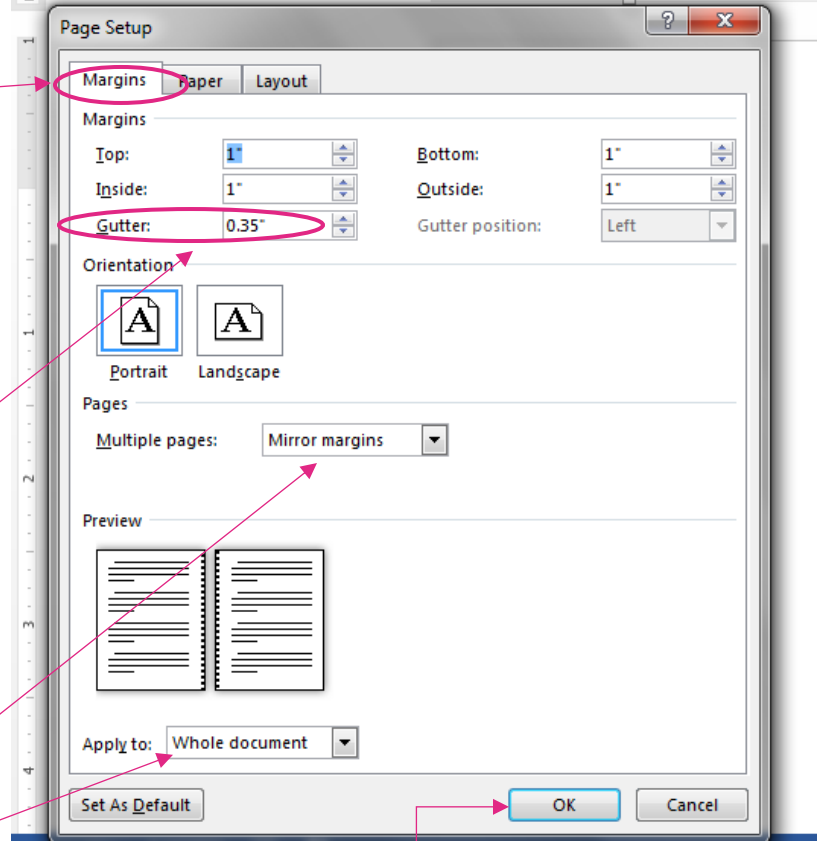
Set the gutter to **.35 inches**.

Mirror Margins

Set the multiple pages to **mirror margins**.

Apply to Whole Document

OK



3. Paper Size

[REQUIRED]

You will want to set your page sizes to match the overall size of the book.

For a 6 inch by 9 inch book, set:

- Width: 6 inches
- Height: 9 inches

Page Layout Tab → Page Setup

Common Book Sizes:

Small Picture Book

5 in x 5 in

Large Picture Book

7 in x 7 in

Journal

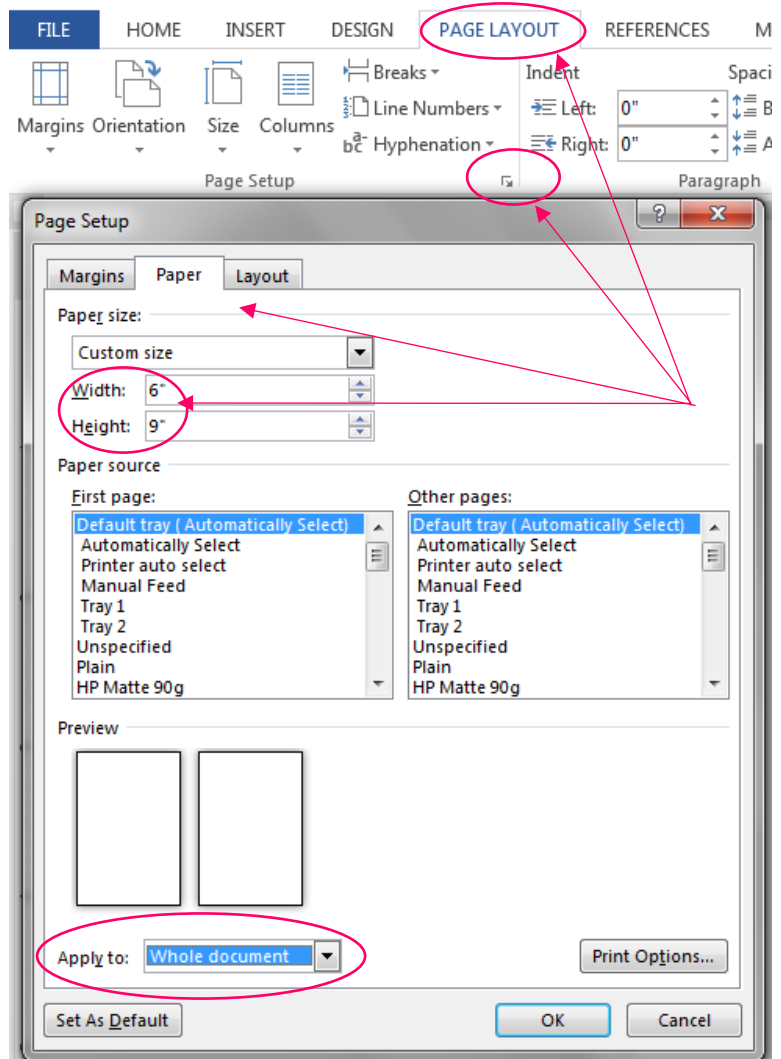
5.5 in x 8.5 in

Novel

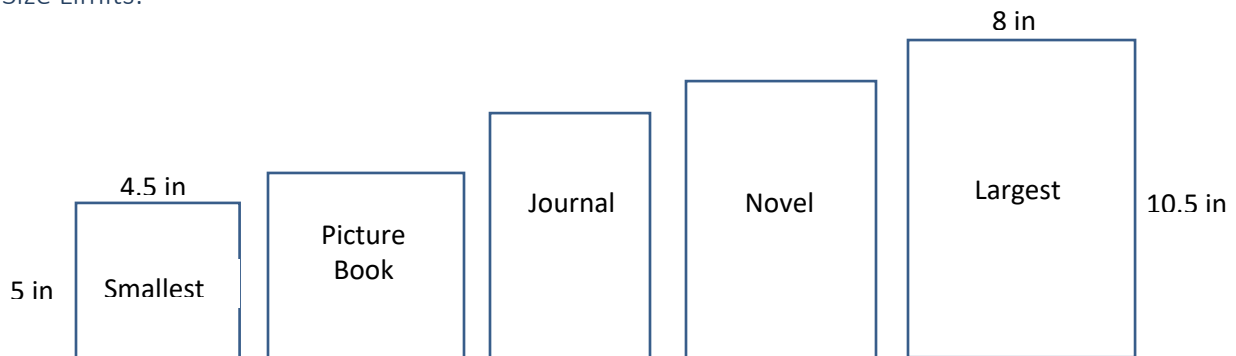
6 in x 9 in

Textbook

7 in x 10 in



Size Limits:



4. Headers and Footers

[OPTIONAL]

You will want to format the header and footer of each section. You will likely want to include page numbers in your books. Often the front matter pages are not numbered.

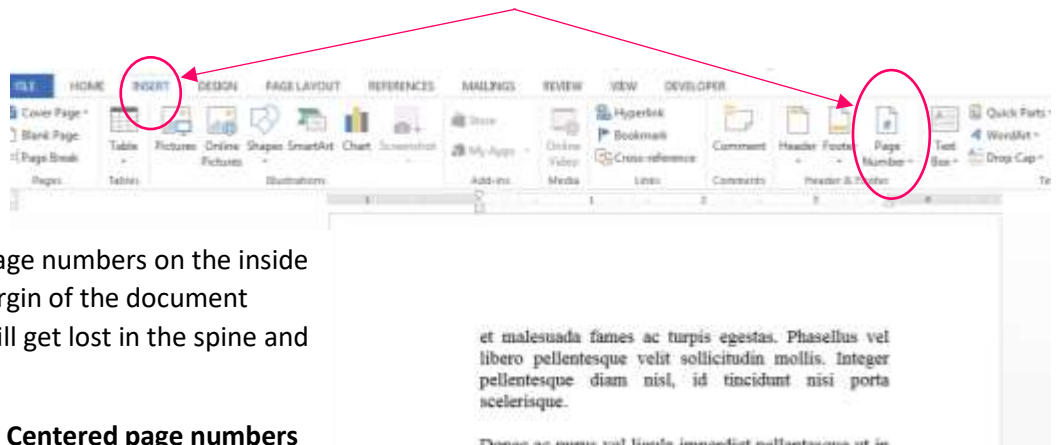
4a. Page Numbers

You will want to add page numbers to each section of the book that requires numbering in the book.

Recommended: **Reduce font size for page numbers and header text by 1.**

If paragraphs are using font size of 11,
make the header and footer a font size of 10.

1. Go to page of the section you wish to format.
2. Insert Tab → Page Number



Avoid placing page numbers on the inside and outside margin of the document because they will get lost in the spine and not be visible.

Recommended: **Centered page numbers**

Different Page Numbers and Formats for Different Sections

It is common to use i, ii, iii... for the front matter of the Book Block, and another numbering format for the core of the book. The header information can also change with each section.

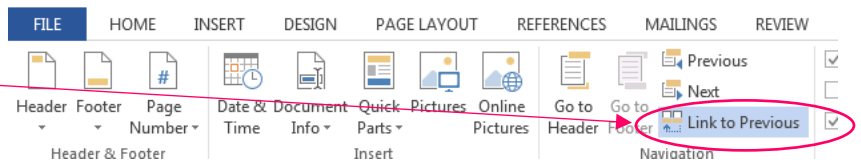
1. Click on the page where you want to start, stop, or change page numbering.
2. Double click on the top or bottom of the page to open the Header and Footer Tools menu.

3. Check to see if a **section break** exists that will allow a change in formatting of the page numbers. [see pg. 5 for how to apply section breaks]

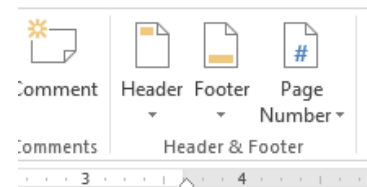


4. Deselect (not highlighted) **Link to Previous Section**.

When this is **NOT** highlighted, it disconnects the sections and allows the header and footer to in each of the sections to be different. When they are linked, it will continue page numbering and text content from the previous section.



5. Insert Tab → choose to add page numbers or edit either the header or footer.



Note: The **Different First Page** option allows you to have the first page of a section to exclude information from the header and/or footer. This is helpful when you have a title page or cover page that does not need to be numbered. Double click the header or footer area and look in Options group of the Header and Footer tools ribbon menu.

4b. Edit Header and Footers

You will want to make sure the margin for the Headers and Footers are **at least .25 inches**.

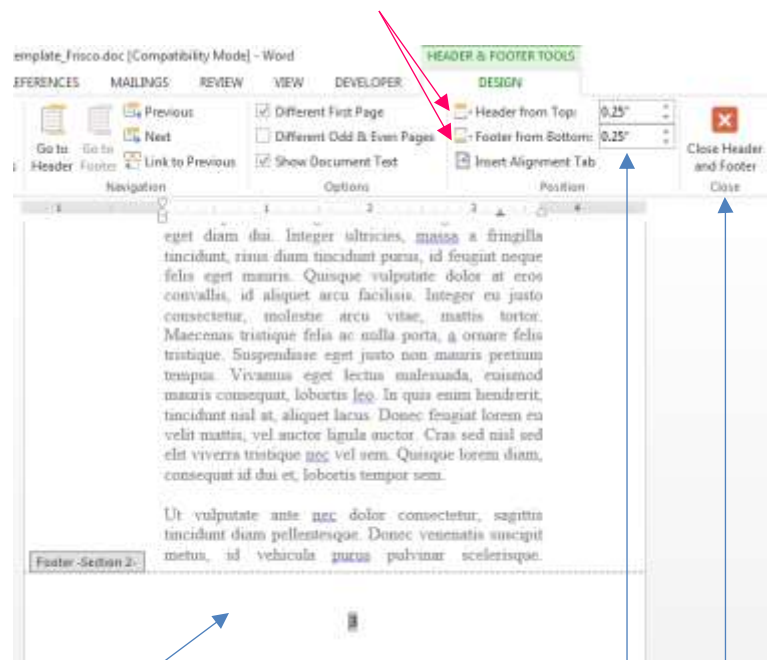
Things to consider for header:

- author name
- book title
- chapter title

To create a header with the chapter title, you will want to make each chapter a section (see Section Breaks).

To Edit Header / Footer:

1. Double click the header or footer area.
2. Type in the header or footer area.
3. Edit the margin for the header and footer (at least 0.25 inches)
4. Control alignment, font choices as usual in the Home Tab.
5. Click Close Header and Footer.



5. Line Spacing

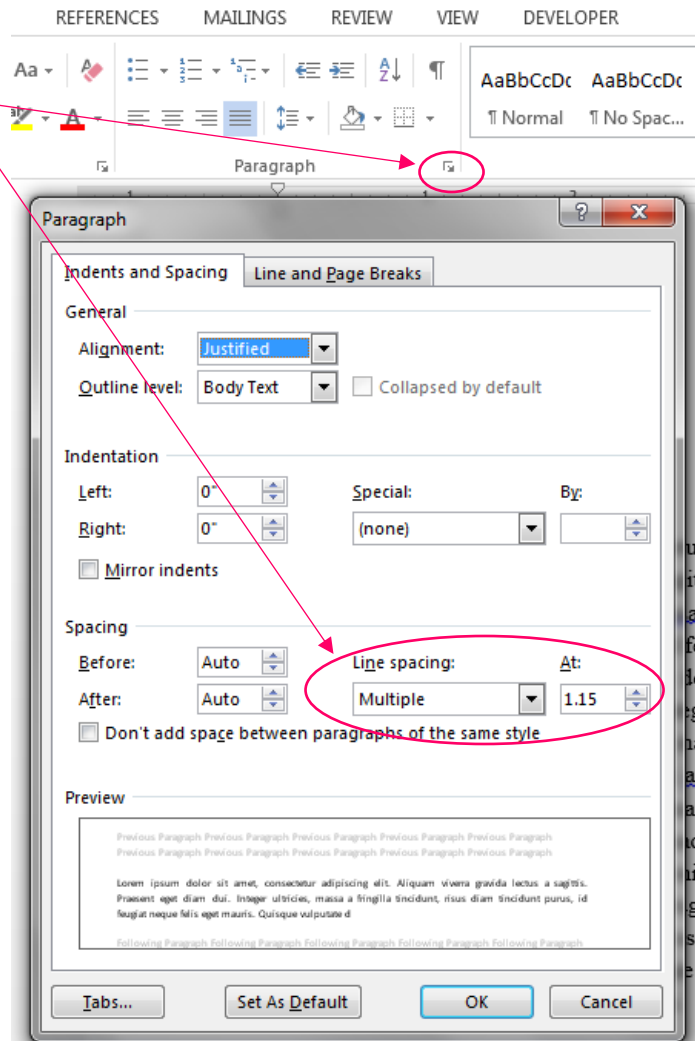
[OPTIONAL]

For professional looking results, keep your line spacing **between 1.15 and 1.25**.

Avoid single and double spacing.

- Most Common: 1.15
- Largest Spacing: 1.25

1. Home Tab → Paragraph Settings
2. **Line Spacing**: select “Multiple”
3. **At**: enter value for spacing



Font

Choose a font that matches your reader.

Common Font Choices:

- Garamond
- Times New Roman
- Arial
- Veranda
- Tahoma

Font Size

- Most Common:
Between 10 and 12 pt

6. Images

[OPTIONAL]

Images in the Book Block (all interior pages of the book) can be printed in black and white (grayscale) or color. Grayscale images will cost you less to print.

- The higher resolution of the image, the better it appears when printed.
- **Avoid** cropping and resizing images in MS Word.
To achieve a high quality, it is best to edit image size and appearance in photo editing software such as Adobe CS Photoshop or other photo editing software.

Recommendations for Images:

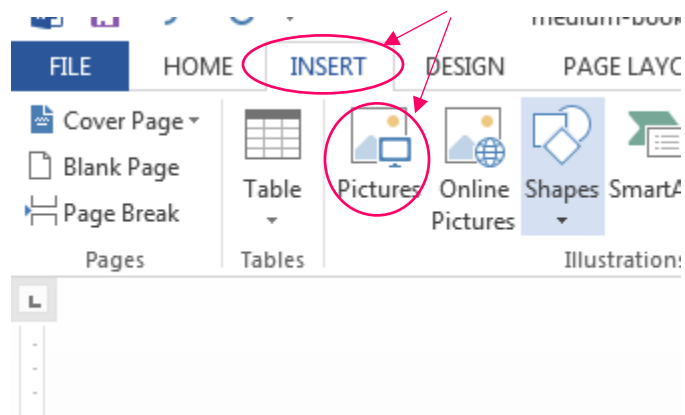
- TIFF format
- 300 dpi
- Sized correctly before inserting

To insert an image:

1. Insert Tab → Pictures
2. Select image

Avoid using drag and drop to insert images.

Avoid using cut and paste to insert images.



Using cut/paste or drag/drop will result in loss of quality of the image and often result in a corrupted file for printing.

Note: You must own the rights, or have permission *in writing*, to use any images included in your book.

Alignment of Images

Because you added a gutter (additional margin space on sides of the page that are bound together) when you select to center your image will seem slightly off-center. **The gutter causes the margins around the page to be unequal on each side**, so while the image is not centered on the paper it is centered on viewable area of the page (some of that paper is bound together to form the spine and is not visible).

Format Pictures for Grayscale

Printing in color on the Book Block pages can be expensive. If you want to save costs, convert your images to grayscale.

Note: Using MS Word's picture tools to recolor the images is inadequate. The Trail Blazer Press will still register those images as color images.

While there are many ways to make an image look grayscale/black and white, those methods typically retain all the color information of the image. This allows the user to toggle back and forth between color and grayscale as you find in most word processors. In short it is a color image that looks grayscale.

Due to the Trail Blazer Press process, to take advantage of the black-and-white pricing, you will need to use images with no color content. These grayscale images cannot switch from grayscale to color and back grayscale and have no color content.

There are three recommended options for converting color images to true grayscale: **Adobe Acrobat**, **Photoshop**, and **GIMP**.

Option 1: Adobe Acrobat

A full version of Adobe Acrobat allows you to convert all elements on every page of a PDF from color to black and white. This option is best for most situations.

Since this option converts the entire PDF to grayscale, this option **does not work** if there are *only select elements that you want as grayscale* and other elements you want to show as color.

To convert to a grayscale PDF, select from the menus:

1. Print Production → Preflight
2. Select the Convert to grayscale fixup
3. Click the **Analyze and Fix** button
4. Save the converted file

Need access to Adobe Acrobat? Contact us and we can assist with finding access to Adobe Acrobat. Let us know that you need to convert the entire Book Block from color to black and white / grayscale.

Option 2: Photoshop

To convert an image to grayscale in Photoshop does not require any special training or skills. After starting Photoshop, open the image you want to convert in Photoshop. Once the photo is loaded into Photoshop:

1. From the Photoshop menu options select: **Image→Mode→Grayscale**.
2. During the conversion process you will be asked:
Discard color information? → Select **DISCARD**

Discarding the color information converts it from a color image to a black and white. You will notice once you make this conversion and save it, you will not be able to change it back to color.

Recommendation: Save the altered photo with a new file name so you do not lose your original color image.

You can now replace the color image in your Book Block with this newly created grayscale image.

Need Access to Photoshop? Contact us and we can assist in locating where you can access Photoshop.

Option 3: GIMP

This is a free open source image editing software similar to Photoshop. To convert a color image to grayscale, you will need to launch the GIMP software and open the image you want to convert. Then select the following from the menu:

1. **Image → Mode → Grayscale**
2. **Export** the image (recommend saving with a new file name)

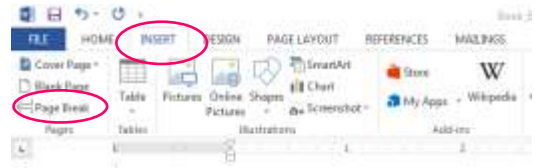
You can now replace the color image in your Book Block with this newly created grayscale image.

Need Access to GIMP? This software is free to download and install onto your computer from www.gimp.org

7. Page Breaks

[OPTIONAL]

Now is a good time to add Page Breaks so that each chapter or section begins on a new page.



1. Place your cursor at the end of the last line you would like to appear on a page.
2. Select the **Insert Tab**
3. Click on **Page Break**

The content on the page after the page break will begin the next page.

Note: Often when simply pressing enter to add additional line and force content to the next page will not always be recognized when converting to the PDF/A format.

Page Break is particularly useful for making sure the start of a chapter happens at the start of page. This way if you go back to edit, your page breaks will keep the beginnings and endings separated even if you add or remove lines of content.

8. Even Number of Pages

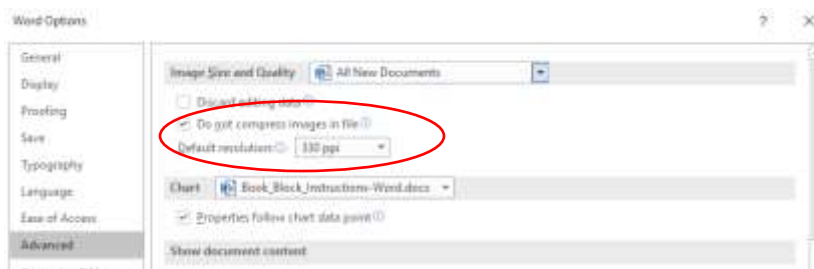
[REQUIRED]

You must have an even number of pages to successfully print. Add blank pages if necessary.

Note: The even page requirement is due to the fact that every sheet of paper has two sides, or two pages. We cannot include only one page (one side of a sheet) in a book.

9. Saving Image Quality

Microsoft Word will compress images put into a document. This compression will lower the image quality and can have negative impact on the quality. To change go to the **File** menu and select **Options**. Then select **Advanced** and scroll to *Image Size and Quality*. **Check Do not compress image files**.

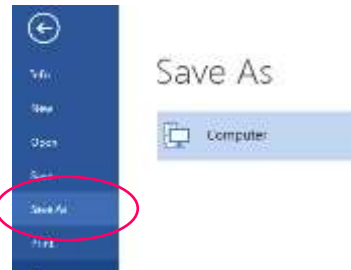


Saving As PDF

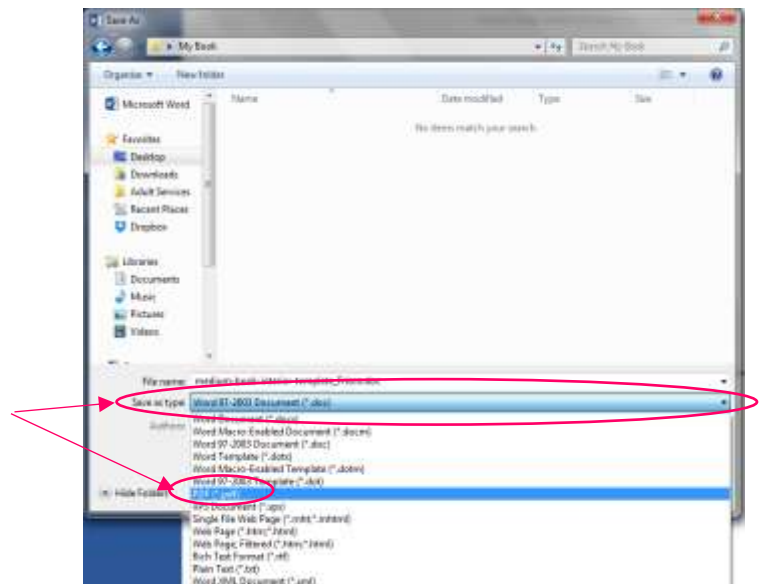
Save the final print version as a PDF/A. Saving as a PDF/A maintains formatting selections and is readable by the book printing machines. If you want to include your books in the OnDemand online catalog, you must use the PDF/A format. Double check the formatting of the result PDF. **Not all text and image effects are supported by the PDF/A format.**

Save As

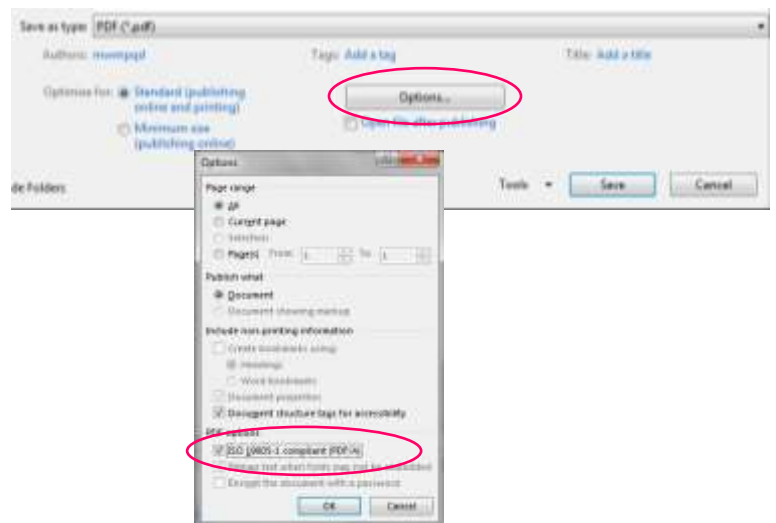
1. File → Save As



2. Use the drop down menu to select PDF.



3. Options: Check PDF/A
4. Ok → Save



Mac Users:

MS Word on a Mac does not offer the option to save as a PDF/A. Save as Word document and use the public library computers to save as a PDF/A. Alternatively you can convert a PDF to PDF/A at:

docupub.com/pdfconvert