

for Adobe InDesign

Interior Book Templates Formatting Guide

**Your Guide to Formatting Your Book
Interior With Our Book Templates
for Adobe InDesign**

BY TRACY ATKINS

BOOKDESIGNTEMPLATES.COM

Thank you for purchasing a quality Book Design Template!

Inside the download you will find everything you need to get started, including:

- A PDF sample of the template for your reference.
- The Adobe InDesign formatted template file.
- All necessary fonts and graphic files

1) Open The Download .ZIP File Folder OR Extract the Template Files from the ZIP Download File

Locate the compressed (zip) template folder that you just downloaded. This will likely be in your computer's "downloads" folder or on your Mac's "finder".

On many PCs, you must extract the contents of the .ZIP file folder to a location of your choice on your computer, such as the desktop. This will allow you to access the template files, documentation, links and other materials.

Newer PCs and Macs will allow you to open and work out of the .ZIP file without extracting the contents. The .ZIP file will appear as a standard folder on your PC or Mac, containing the template and related files.

For PC

1. Click on file to highlight
2. Right click
3. Select 'Extract All'
4. Choose location to save extracted files or
5. Click Extract

(For more information visit, <http://windows.microsoft.com/en-us/windows-8/zip-unzip-files> or <http://windows.microsoft.com/en-us/windows/compress-uncompress-files-zip-files#1TC=windows-7>)

For MAC

1. Two finger click on .zip file with your touchpad, or right-click if you have a mouse.
2. Choose 'Open With' then Archive Utility

(For more information visit, <http://support.apple.com/kb/PH10915>)

2) Install the Fonts

Inside the template folder, locate the “Document Fonts” folder and open it. Install all of the included fonts by opening and installing each one individually.

Install Fonts – PC

1. Open Template Folder
2. Open the Document Fonts Folder
3. Double Click the First Font to open the font file
4. Click INSTALL
5. Repeat from step 3 for each included font.

(For more information, visit <http://windows.microsoft.com/en-us/windows-vista/install-or-uninstall-fonts>)

Install Fonts – MAC

1. Open Template Folder
2. Open Document Fonts Folder
3. Click Finder / Go / Font Book to open the Mac Font Book application.
4. Copy each font to the Mac Font Book Application
5. Repeat from step 3 for each included font.

(For more Information, visit <http://support.apple.com/en-us/HT2509>)

Name	Date modified	Type	Size
Document fonts	11/23/2014 8:41 PM	File folder	
Links	11/23/2014 8:41 PM	File folder	
Balance Ornament.png	8/18/2013 12:33 PM	PNG image	1 KB
Balance_5.25x8.idml	11/23/2014 8:41 PM	InDesign Markup ...	64 KB
Balance_5.25x8.indd	11/23/2014 8:41 PM	InDesign Document	1,296 KB
Balance_5.25x8.pdf	11/23/2014 8:41 PM	Adobe Acrobat D...	463 KB
Get the Free Book Construction Blueprint...	4/13/2013 4:34 PM	Internet Shortcut	1 KB
START HERE - Instructions and Formattin...	11/20/2014 8:35 AM	Internet Shortcut	1 KB

3) Open the Template using Adobe InDesign

We include two versions of the template file for your convenience.

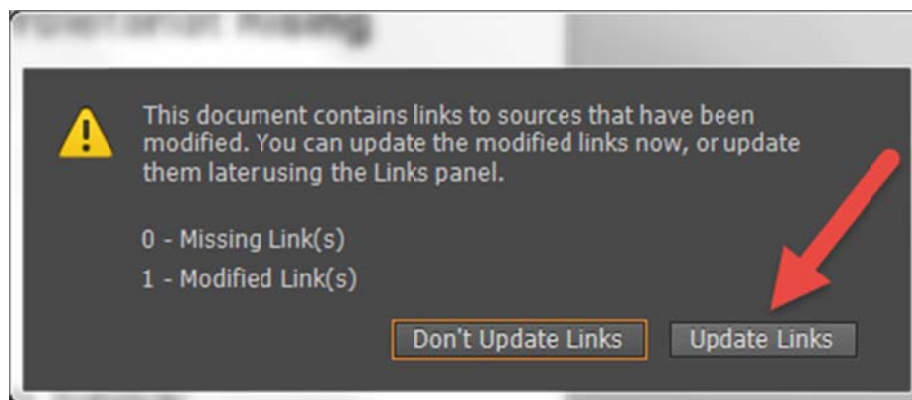
The .INDD file should be used if you have Adobe InDesign CC 2014 or newer.

The .IDML file should be used if you have an older version of Adobe InDesign.

Name	Date modified	Type	Size
Document fonts	11/23/2014 8:41 PM	File folder	
Links	11/23/2014 8:41 PM	File folder	
Balance Ornament.png	8/18/2013 12:33 PM	PNG image	1 KB
Balance_5.25x8.idml	11/23/2014 8:41 PM	InDesign Markup Document	64 KB
Balance_5.25x8.indd	11/23/2014 8:41 PM	InDesign Document	1,296 KB
Balance_5.25x8.pdf	11/23/2014 8:41 PM	Adobe Acrobat Document	463 KB
Get the Free Book Construction Blueprint...	4/13/2013 4:34 PM	Internet Shortcut	1 KB
START HERE - Instructions and Formattin...	11/20/2014 8:35 AM	Internet Shortcut	1 KB

You will then be prompted to update all links.

Choose Update Links from the menu. This will reconnect the template to the graphics that are included with it. If InDesign asks for a location for the graphics, you can find a copy of all included graphics in the Links folder that accompanies the template.

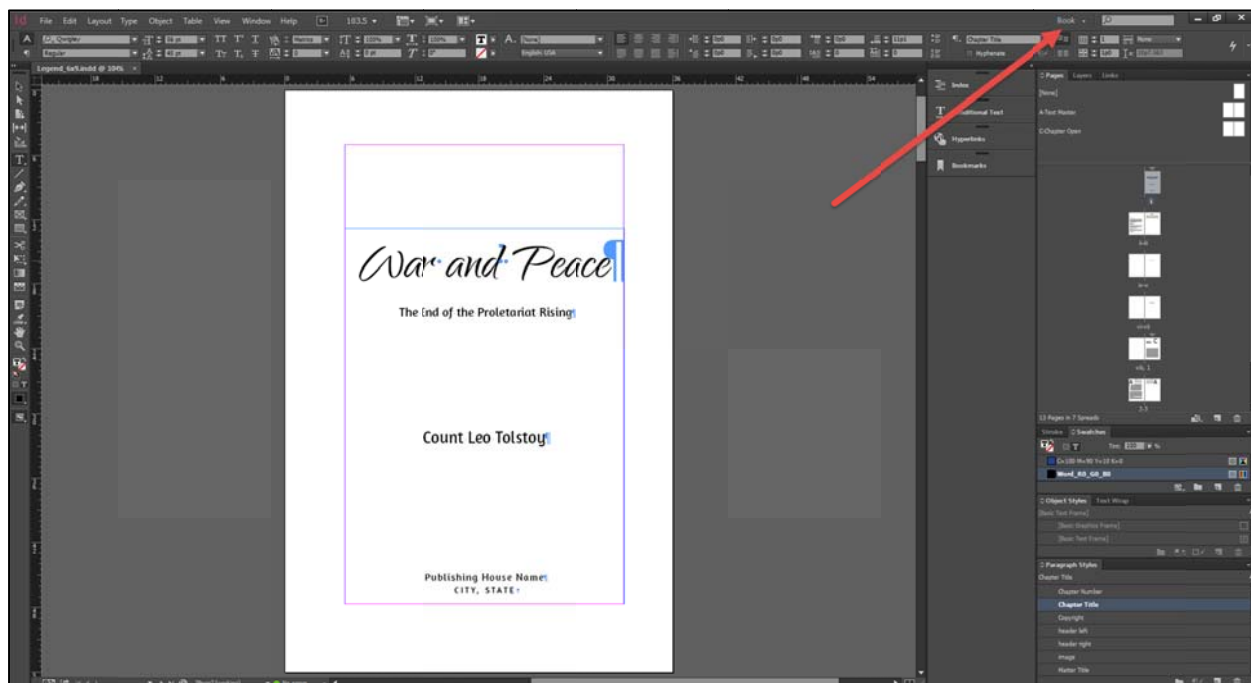


If prompted that fonts are missing, please exit InDesign and install the included fonts to your system that are located in the "Document Fonts" folder.

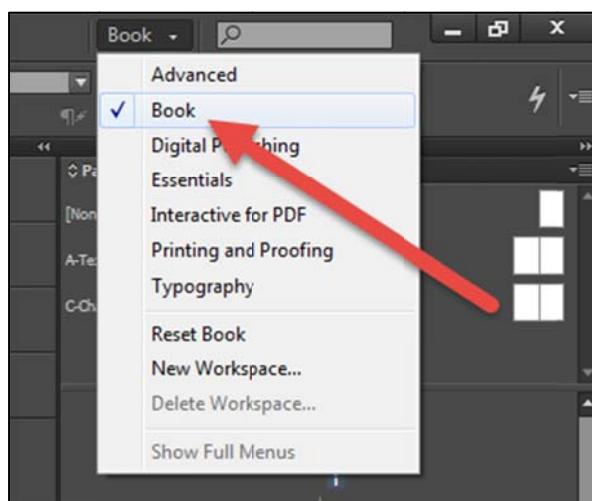
Preparing Adobe InDesign

Prior to using the template, InDesign requires a few small configuration settings to make working with your book easier. We will cover these steps here in detail.

Set InDesign to use the Book menu scheme.



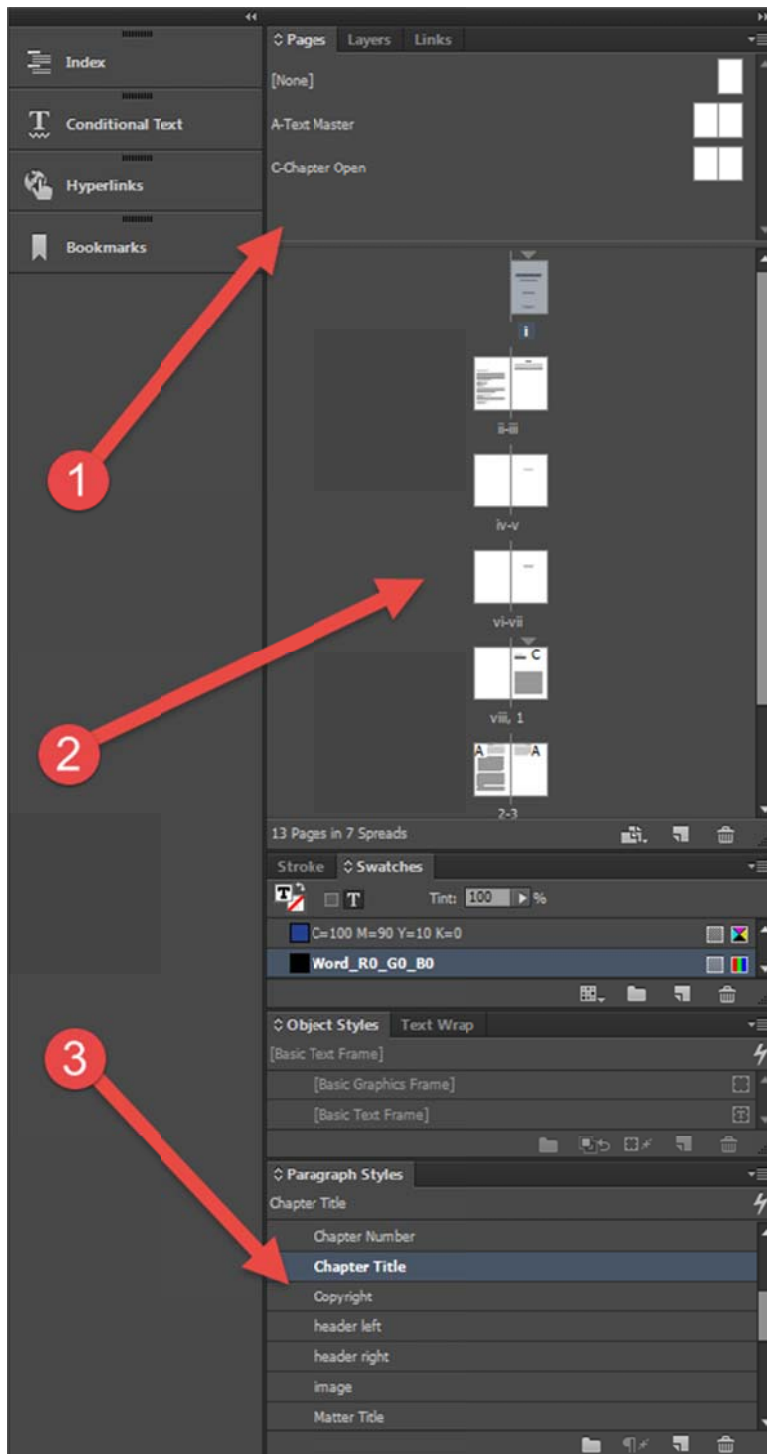
From the drop down, choose Book.



This will give you all of the proper menus for selecting styles, master pages, and settings for book layout.

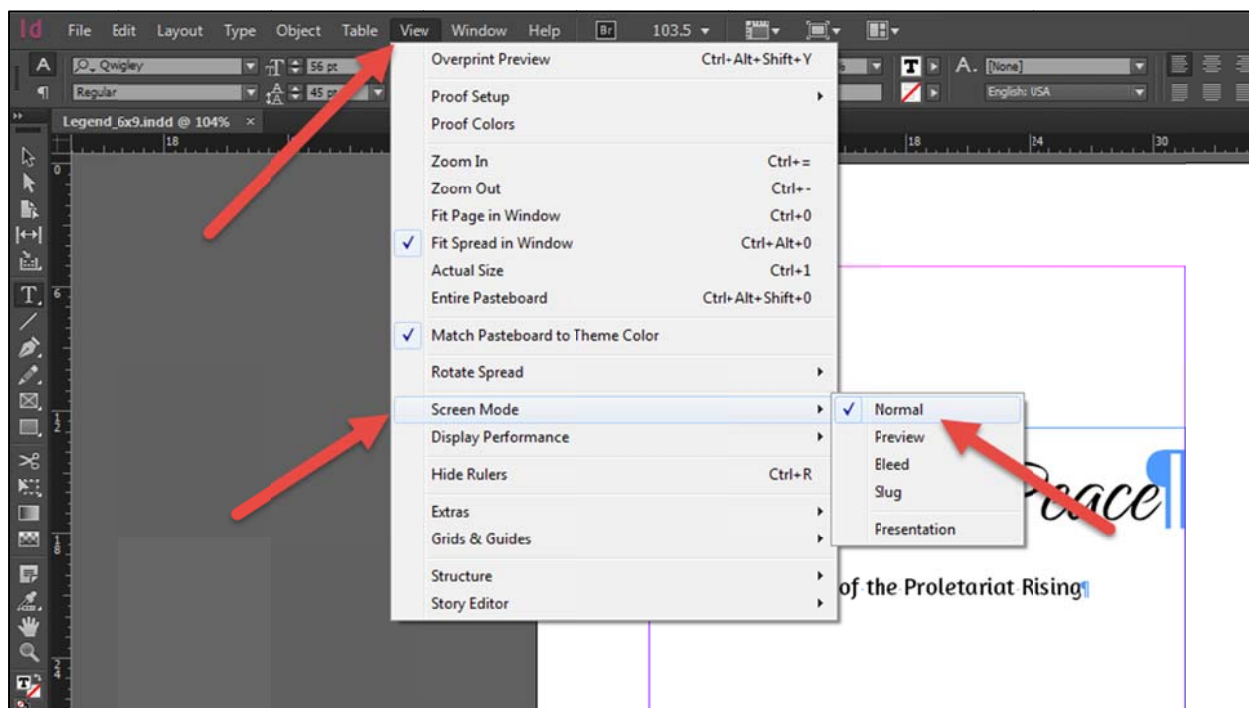
The Book setting will give you menus for the following:

- 1) Master Pages
- 2) The Page Overview
- 3) Paragraph Styles

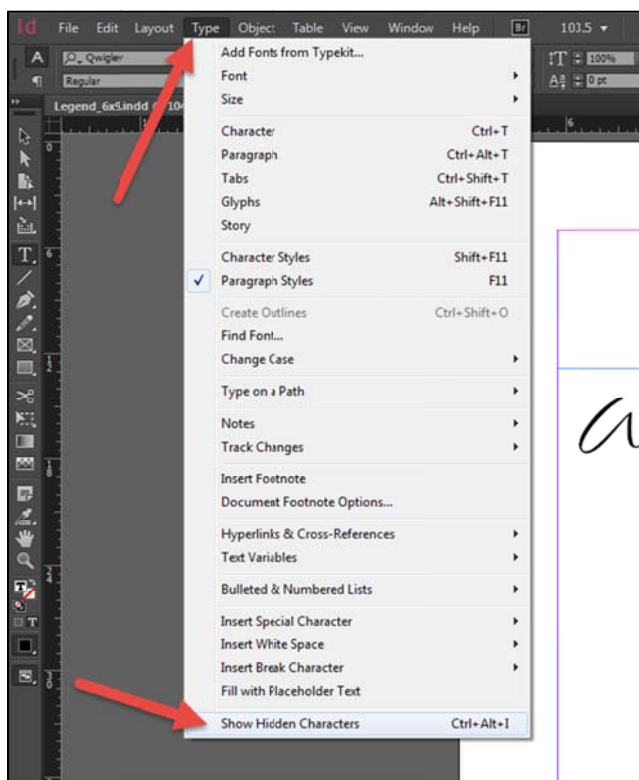


Next, set your screen mode to normal.

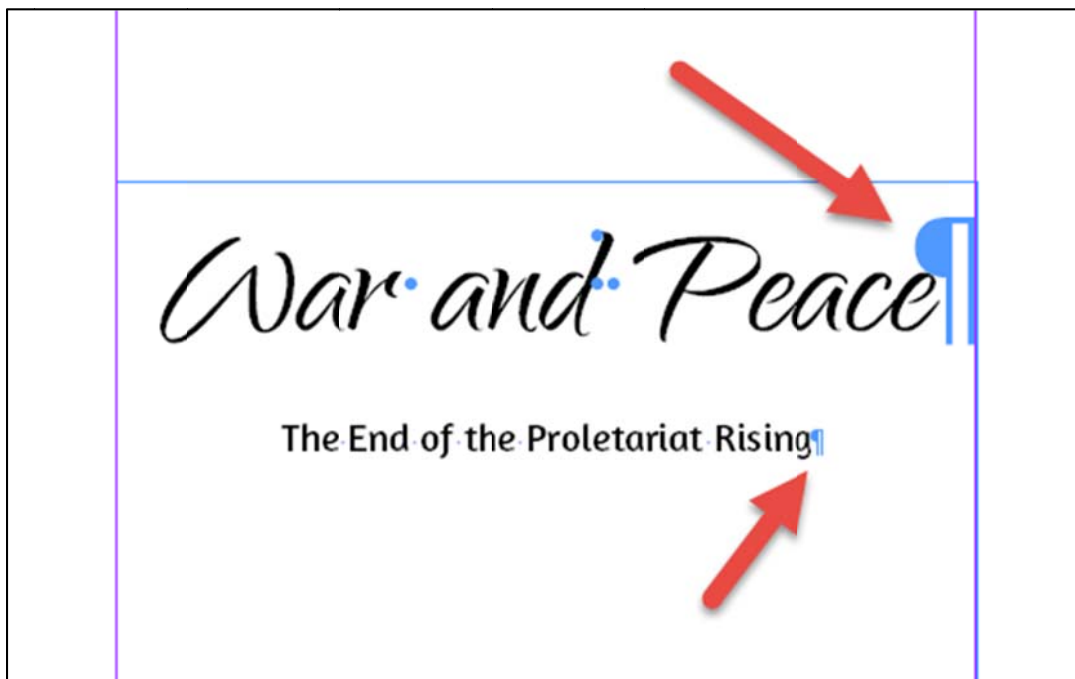
Select View from the menu, then Screen Mode, and Normal.



Next, make sure Show Hidden Characters is turned on, under the Type menu option.




This will show all of the hidden formatting marks in the template.



These formatting marks will help you see where you have paragraph returns, like the large blue pilcrow symbol above, spaces, which appear as blue dots, and other hidden formatting marks that are in your document.

Some common marks and their Meaning:

Section or page break: 

Paragraph break : 

System inserted (automatic) hyphen: 

Using the Template

You are now ready to begin using the template.

There are seven steps involved in formatting your book.

- 1) Setup of the front matter pages, including the title page, copyright page, and dedication.

Here you will go through each of the front matter pages and change the template's sample text to your own.

- 2) Preparing your manuscript so that it can be placed into the template.

To ensure a clean format of your book, there are a few cleanup steps that we recommend taking to make sure your manuscript is in good shape for transfer to the template.

- 3) Pre-placement tasks to get the template ready for your text

We include a few sample pages with the template so you can study them to see how the template will work with text in it. To use the template, you will need to remove some of this sample content.

- 4) Placing your manuscript into the body of the template.

Placing your text into the template is a quick process, but there are a few special steps you will need to take to make sure everything goes where it should.

- 5) Styling the text and applying master pages.

The template includes styles for many formatting situations, like chapter numbers, chapter titles, body text, and more. You will apply these styles and master pages to the book to rapidly layout the entire book with ease.

- 6) Cleanup of your book and a final overview.

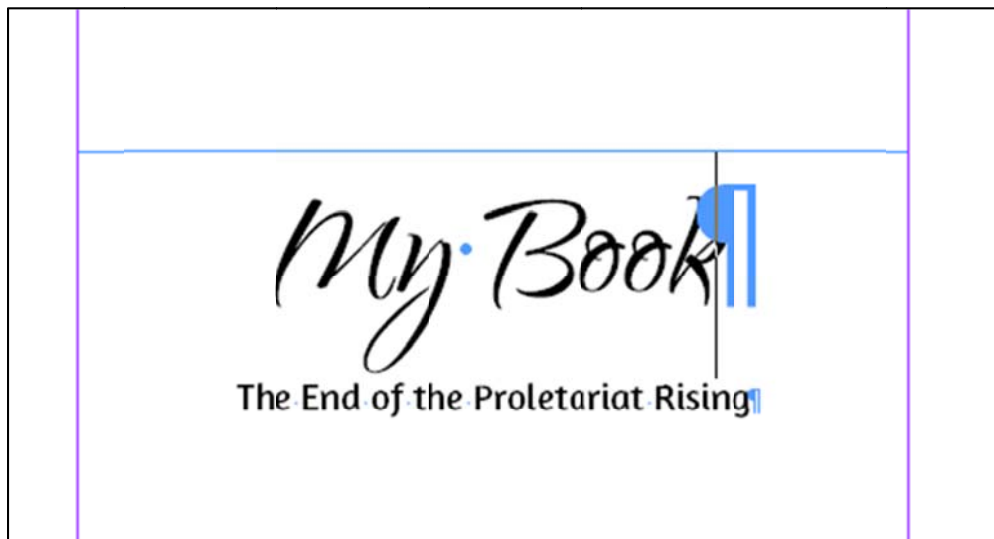
As a final step, you will review the entire book file for proper formatting.

- 7) Export to PDF for print, and ePub for eBook

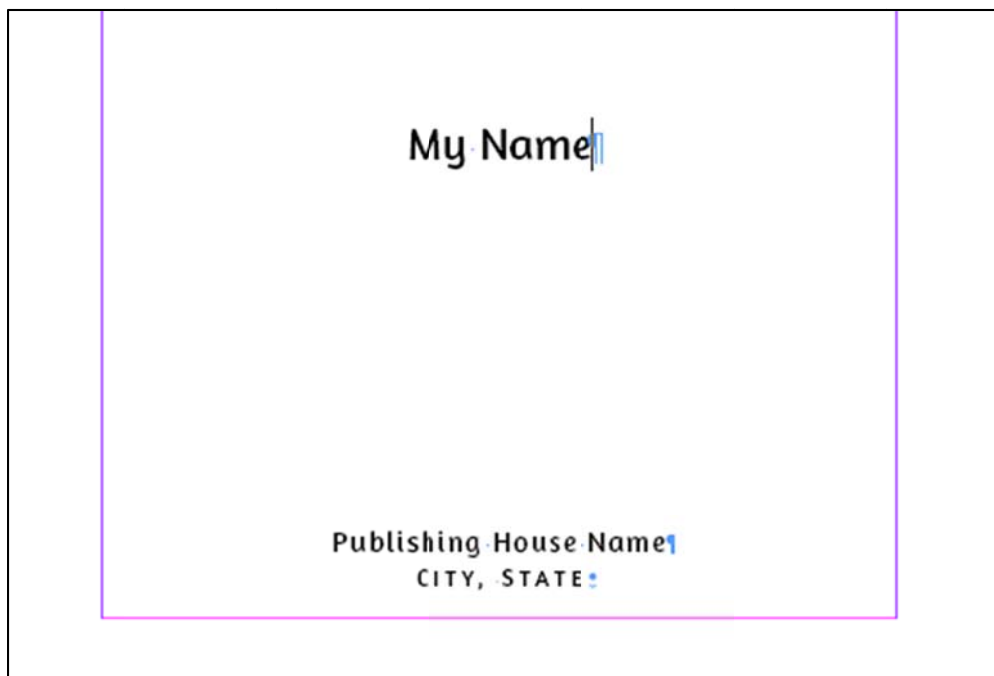
The final step is to create a print-ready PDF using Adobe Acrobat, and export the book file to an ePub file that is compatible with all major eReader platforms including Kindle and iPad.

Step 1: Edit the Front Matter

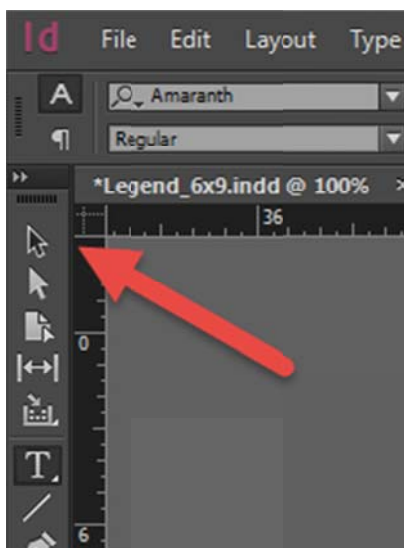
First, edit the text on the book cover page by double clicking on the sample book title. This will allow you to open the text box and edit the contents.



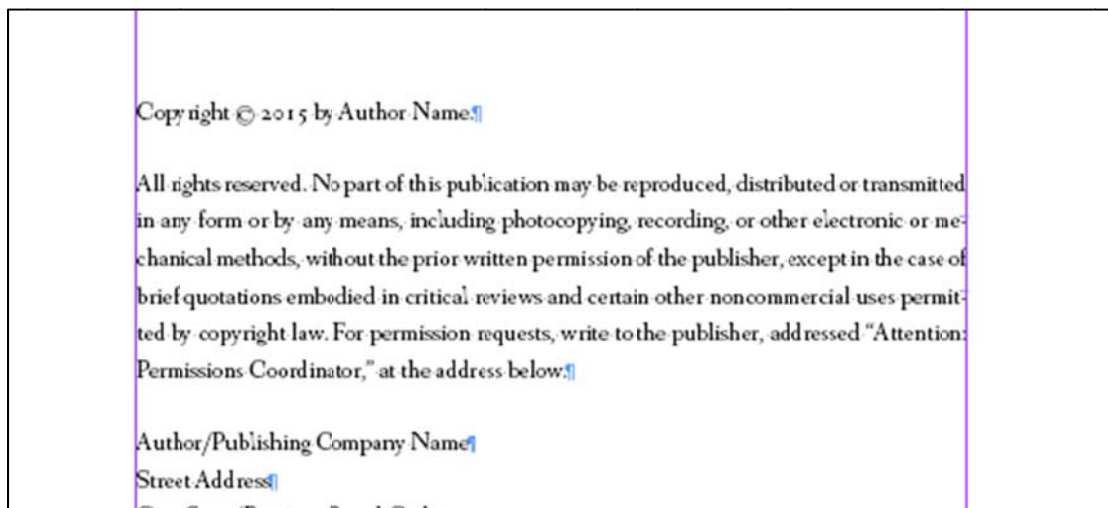
Next, edit or remove the book subtitle, author name, and publisher information on the rest of the page.



When finished editing the text on the page, click the black pointer icon (Selection Tool) to exit the text editing function in the document. (You may also use the escape key on your keyboard to exit the editing function.)



Next, move down to the copyright page, and double click on the text to edit it.



When finished, exit the editing function.

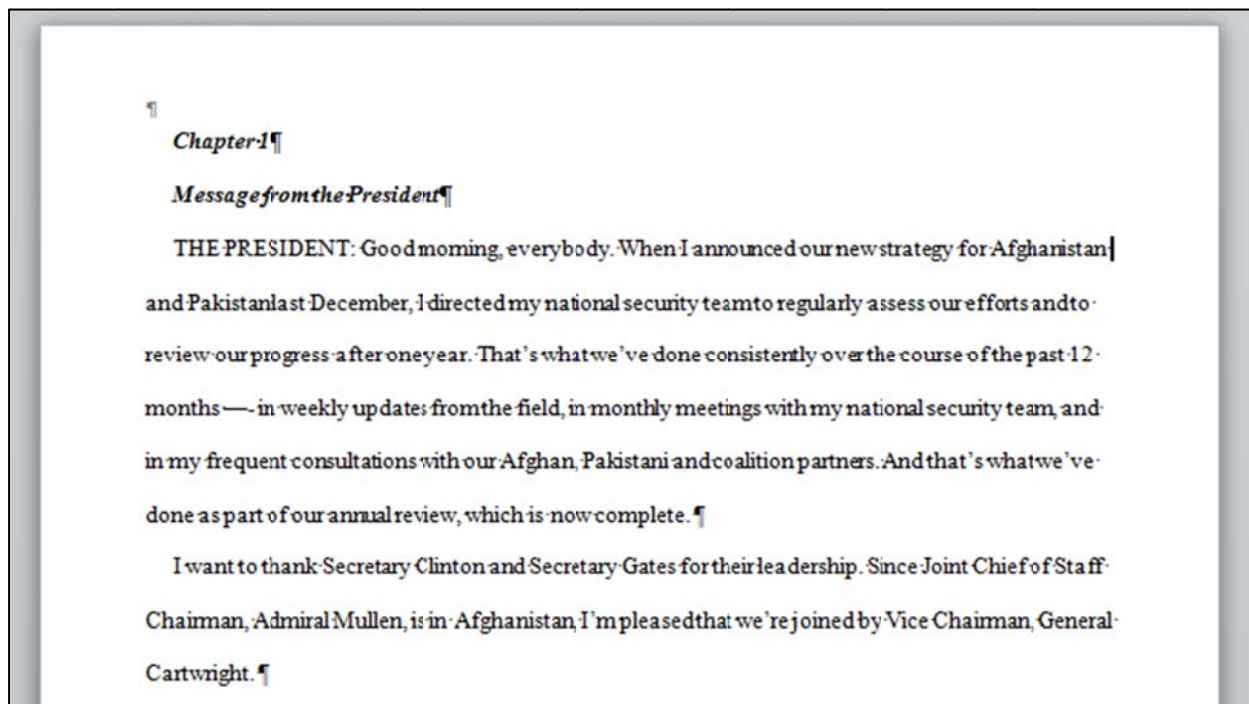
Skip the Table of Contents page for now. We will come back to it later

Complete the rest of the front matter by editing the dedication page, and the acknowledgements page.

Step 2: Prepare your Manuscript

Your manuscript should be prepared for import into the InDesign template by following a few recommended best practices.

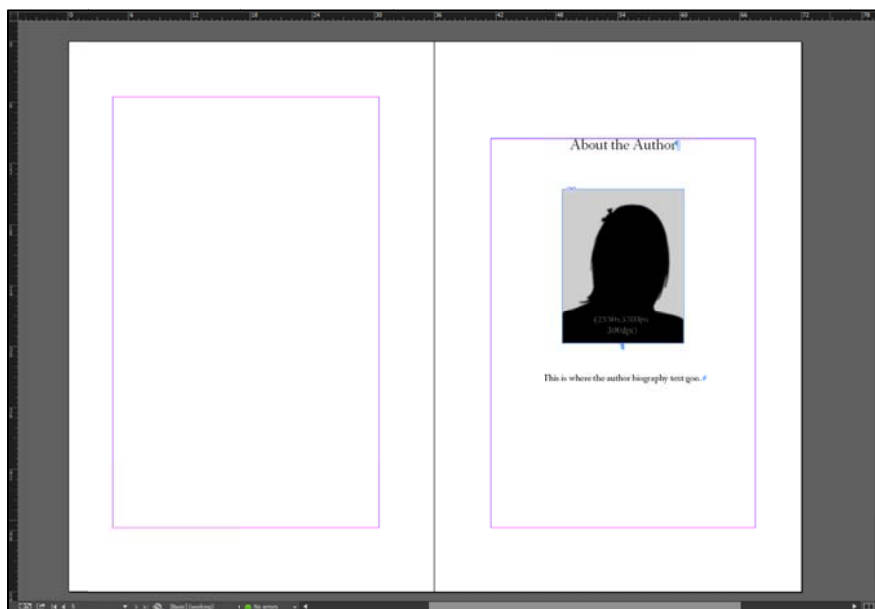
- 1) The file should be in a common word processor format, like .DOC, or .DOCX.
- 2) The file should only contain the body and back matter pages of your book. The template already includes title, dedication, acknowledgements, and a table of contents. So leave these out of the manuscript file that you will import. You should include all chapters, any prefaces or forwards, and any back matter you have, like your author bio.
- 3) Try to avoid excessive use of the enter key. As a best practice, any places where you have two or more hard paragraph returns, created by pressing enter, should be removed. Most word processors have a find/replace function that can help you quickly remove excess paragraph returns.
- 4) Also try to avoid excessive use spaces. As a best practice, any places where you have two or more spaces, created by pressing the spacebar, should be removed. Most word processors have a find/replace function that can help you quickly remove excess spaces.
- 5) Remove any tabs that were used to indent paragraphs or other sections of text. The styles in InDesign will automatically indent the paragraphs correctly, and a tab will cause these indents to be too large. Again you may use your word processors find/replace function to remove the tabs from your document.
- 6) Retain all italic text in your document. Be careful when preparing your manuscript file for import that you do not overwrite any italicized text by accident.



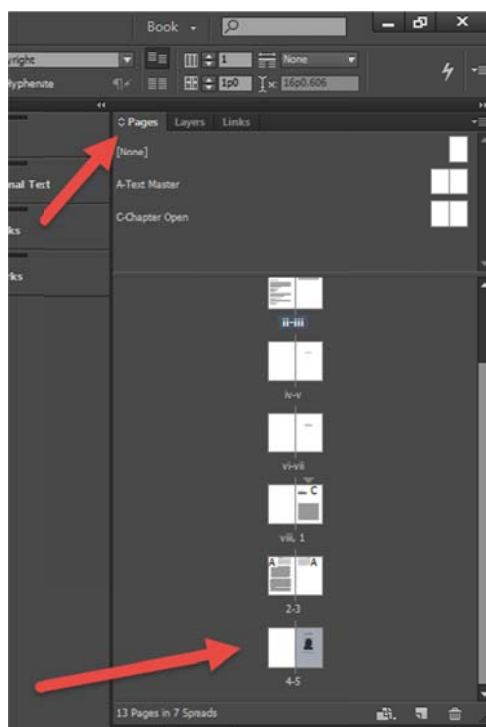
Step 3: Pre-Placement Tasks

There are a few pre-placement tasks that you will need to follow to remove the sample text from the template and get it ready for placement of your text from your manuscript.

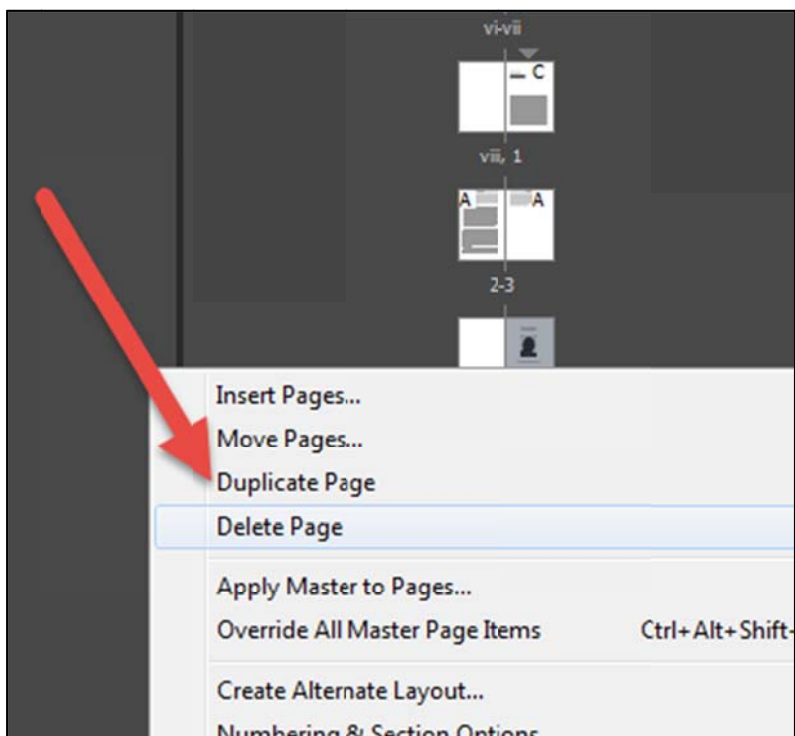
First, open the template and scroll to the bottom, to find the last pages of the template.



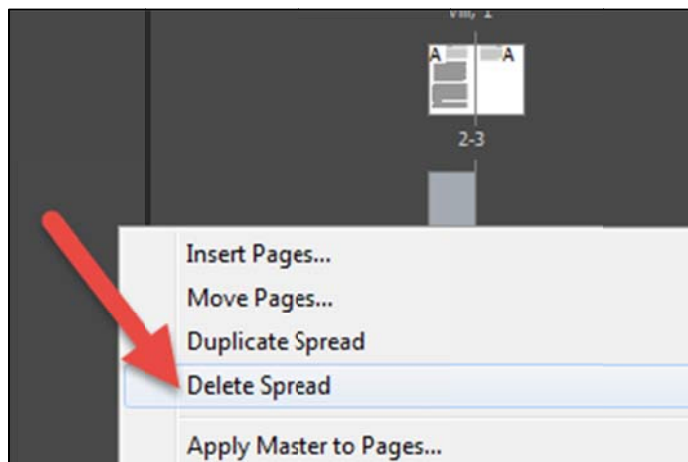
Next, click the last page of the template in the Pages submenu.



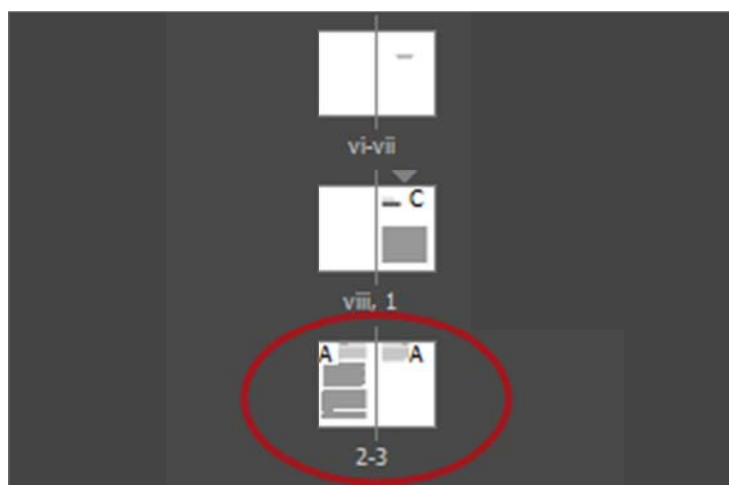
Right click, or 2-finger click, on the last page to bring up the context menu. Click Delete Page, to remove the last page of the template.



Repeat this process for the blank page that preceded the page you just removed by deleting the page or spread.



You should now have two "A" pages as the last page of the template file.

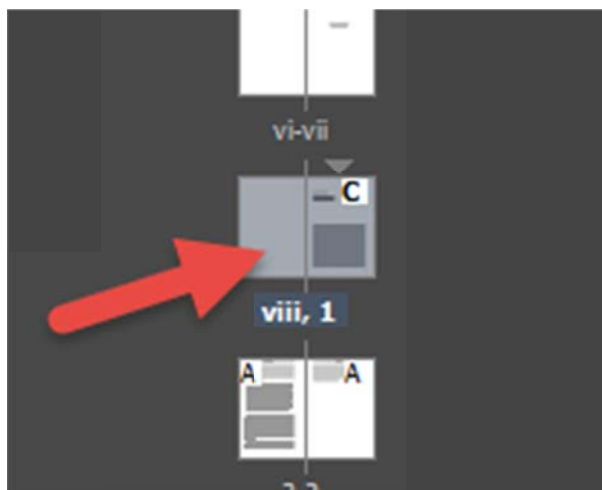


Next, we are going to change the "C" page, which is set to chapter 1, page 1, to be an "A" page.

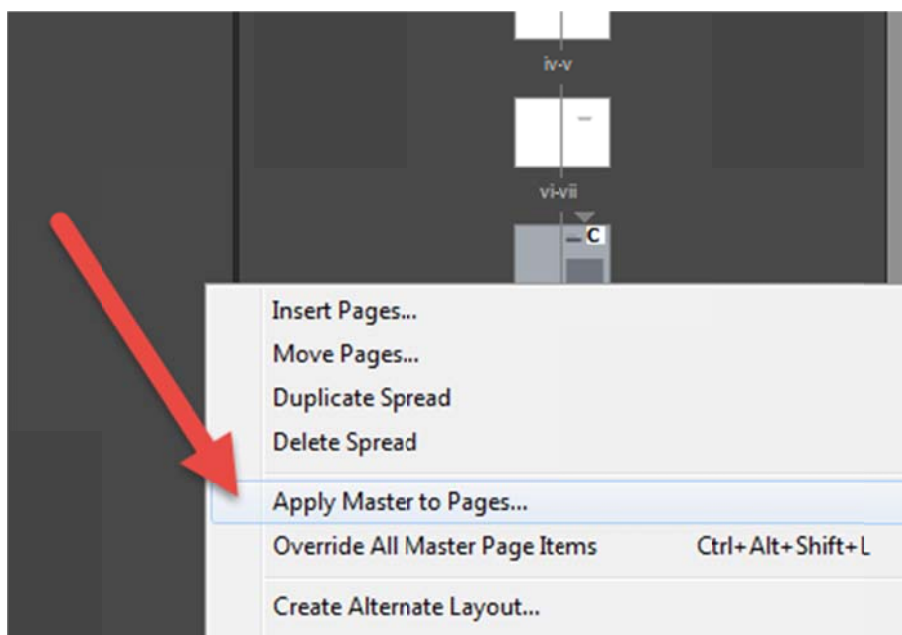
These are master pages that have been applied to the template to show how the sample works. You will change this page back to a "C", or "Chapter Open" page later on after you have placed the manuscript into the book. However, to get the template ready to accept your manuscript, the master for this page will need to be set to "A", or "Text Master".

Master pages are how InDesign knows what type of page to use for the particular text in the book. They are a rapid way to format your book without having to set the page numbering and headers on every page.

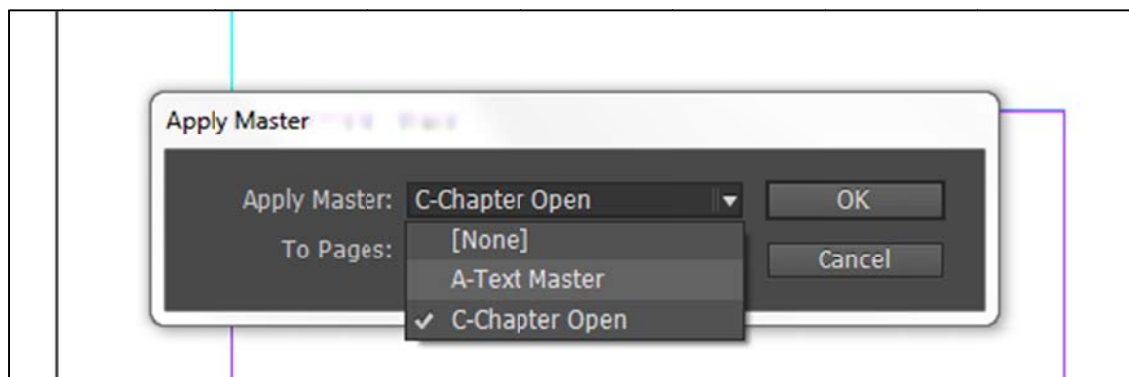
To set Chapter 1, page 1 to an "A" master page, highlight it by clicking on it.



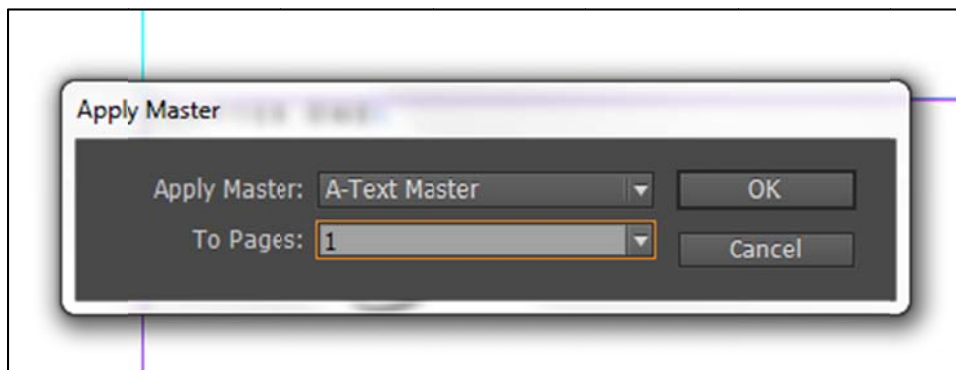
Then right click, or two-finger click the "C" page and click "Apply Master to Pages".



Select "A Text Master" from the drop-down ,



Then enter "1" into the "To Pages:" box. Then press OK.

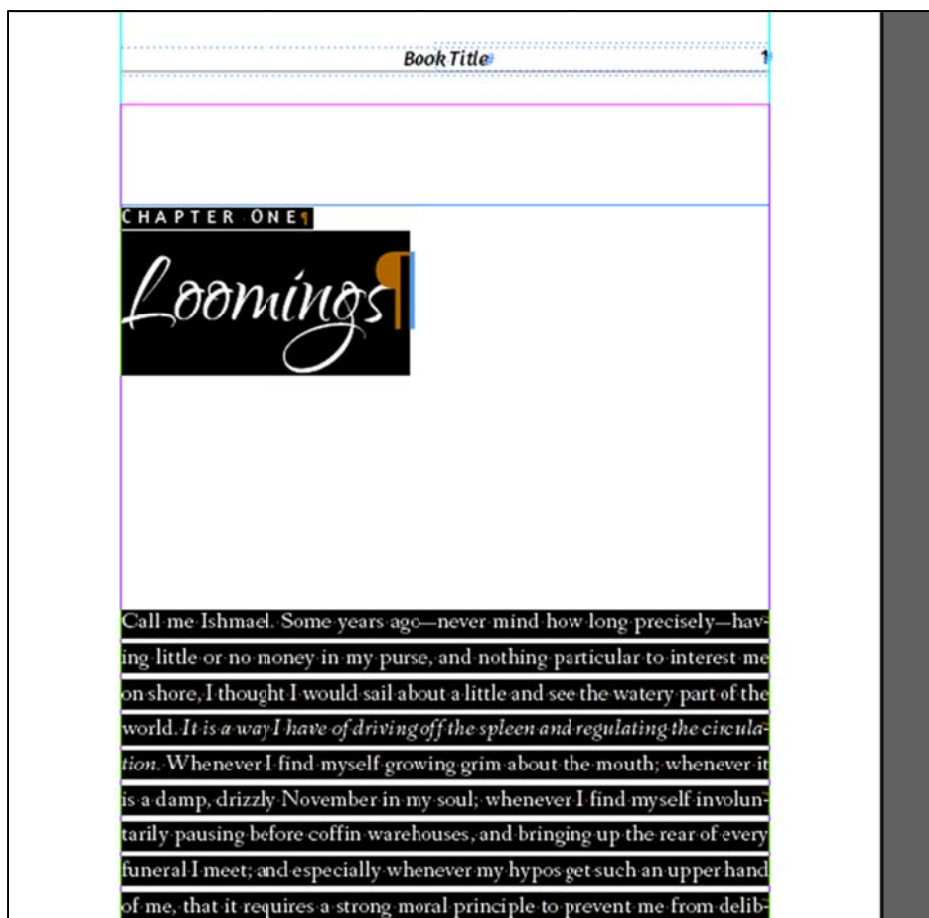


You have now set the master page for Chapter 1, Page 1, to “A”.



Now, we will highlight and delete all of the text in the sample chapter.

Highlight all of the text by clicking your mouse before the first character of the chapter’s title text, and dragging the mouse to highlight all of the sample text.

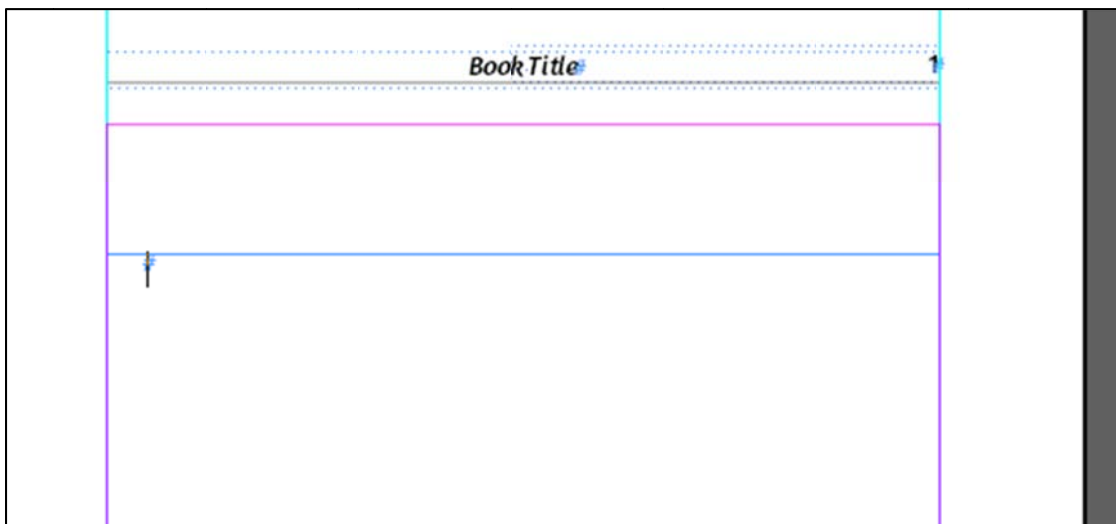


Next, press Delete, to remove the text, and author biography photo. Everything must be removed.. The template is now ready for your manuscript to be imported.

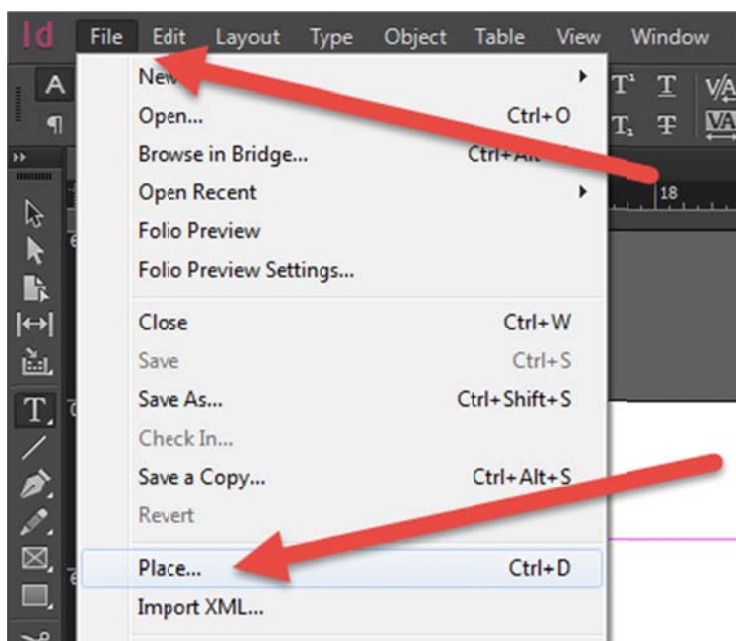
Step 4: Placing your Manuscript into the Template.

Placing your text is a simple process, but there are a few things to look out for when you first place the text into the document to make sure it flows correctly. However, if you have a clean source file that is free from extraneous formatting, this task is a breeze.

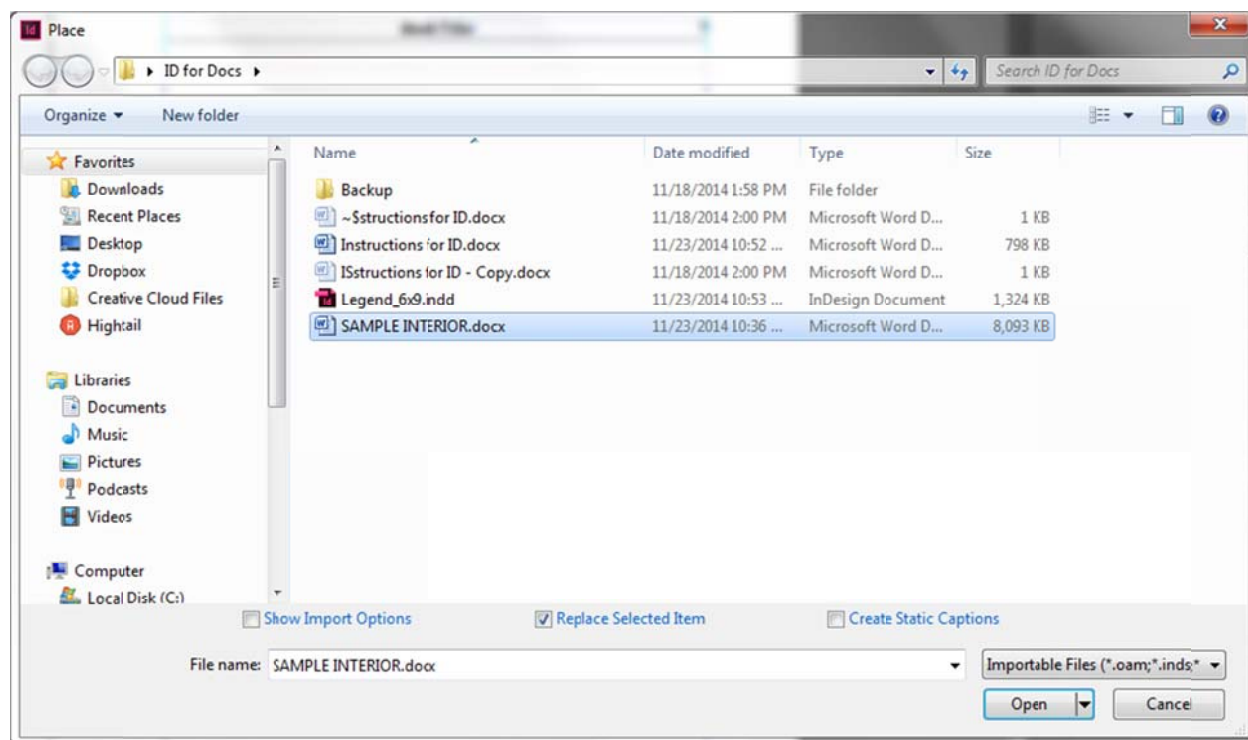
First, place your cursor in the area where the first paragraph of the first chapter, or preface/introduction will go and click. This is normally before the blue “dot” on the chapter 1, page one page in the blue box.



Next, on the File menu, select Place.

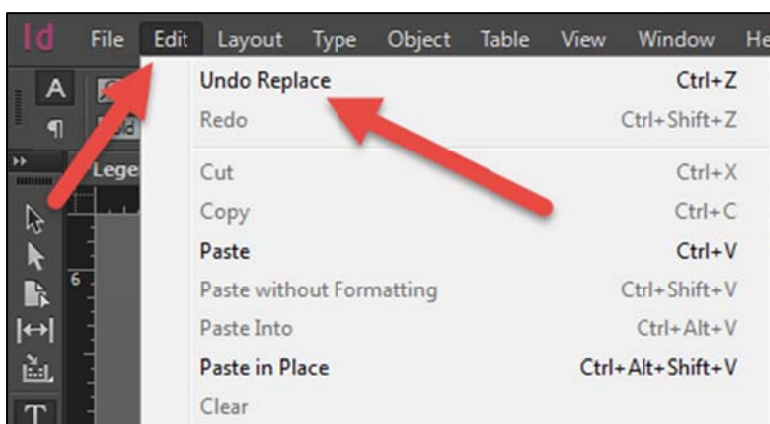


Find your manuscript file on your computer and click Open.



Some of the contents of the file will be placed in the template.

However, InDesign does not know how to correctly flow the book's text. To place the text into a reflowable format, the next step involved performing an "Undo Replace" function from the edit Menu.

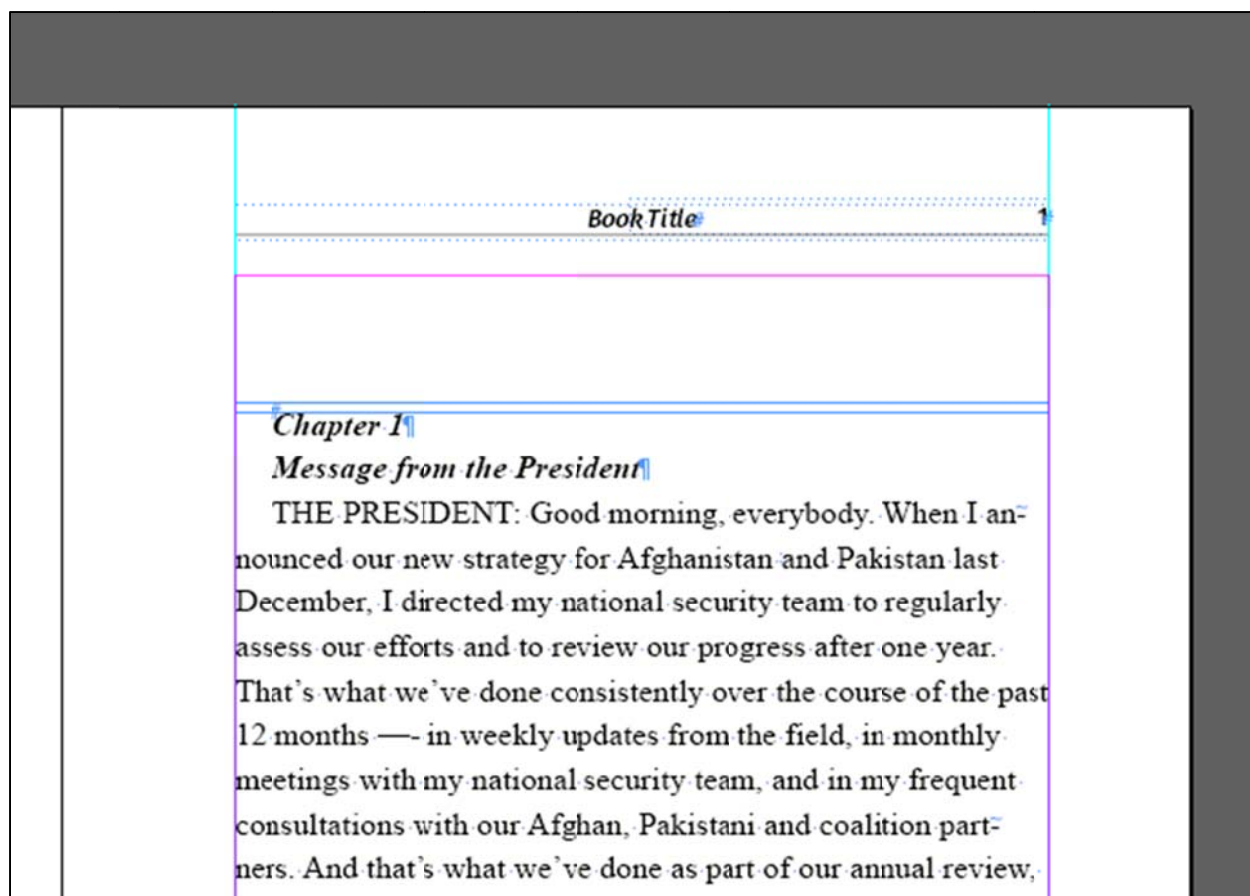


This will remove all of the text you placed into the template, and replace your cursor with a special one that shows a preview of the text.

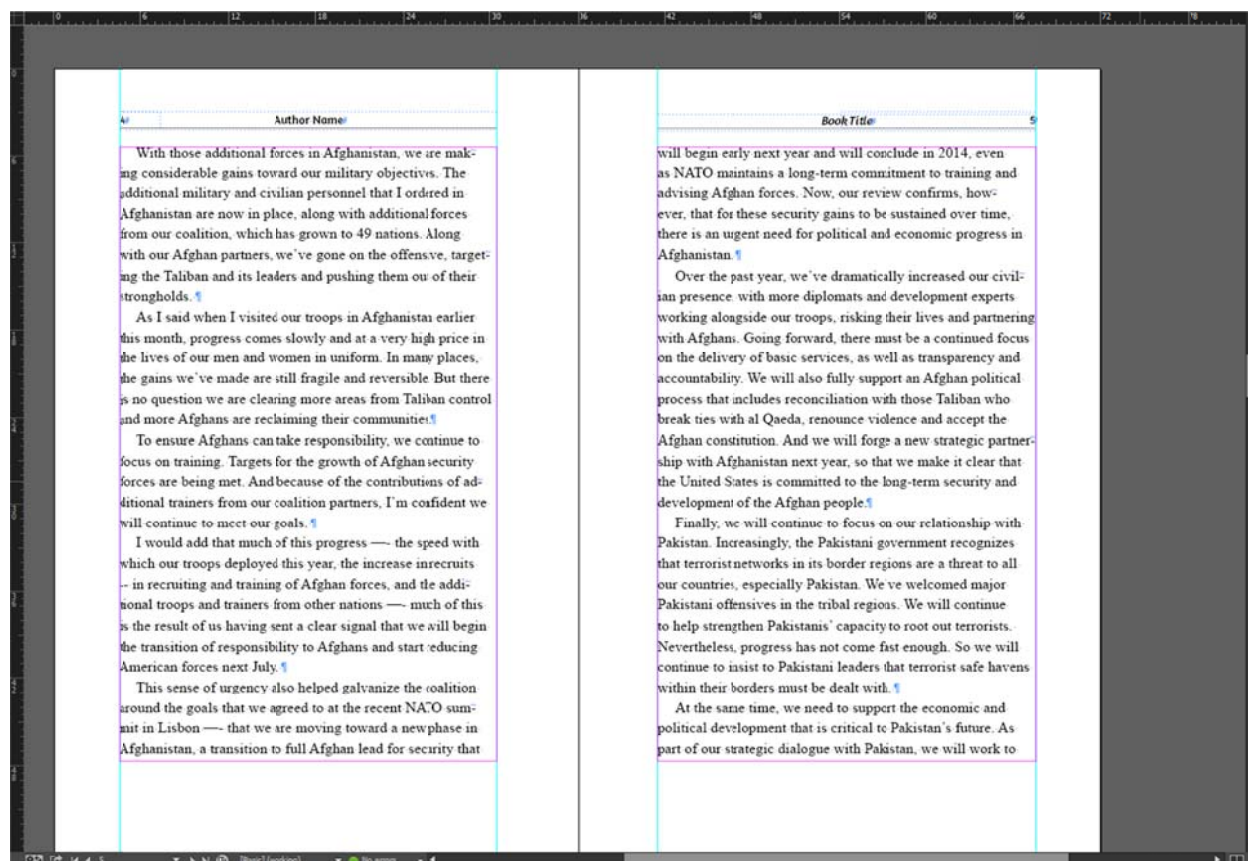


To place your manuscript's full text in the template;

HOLD SHIFT while clicking the mouse right below the blue line at the top of the page. This will paste the text so that the entire contents of your manuscript are included in the place.



All of the pages of the book should flow and have page numbers and running heads.



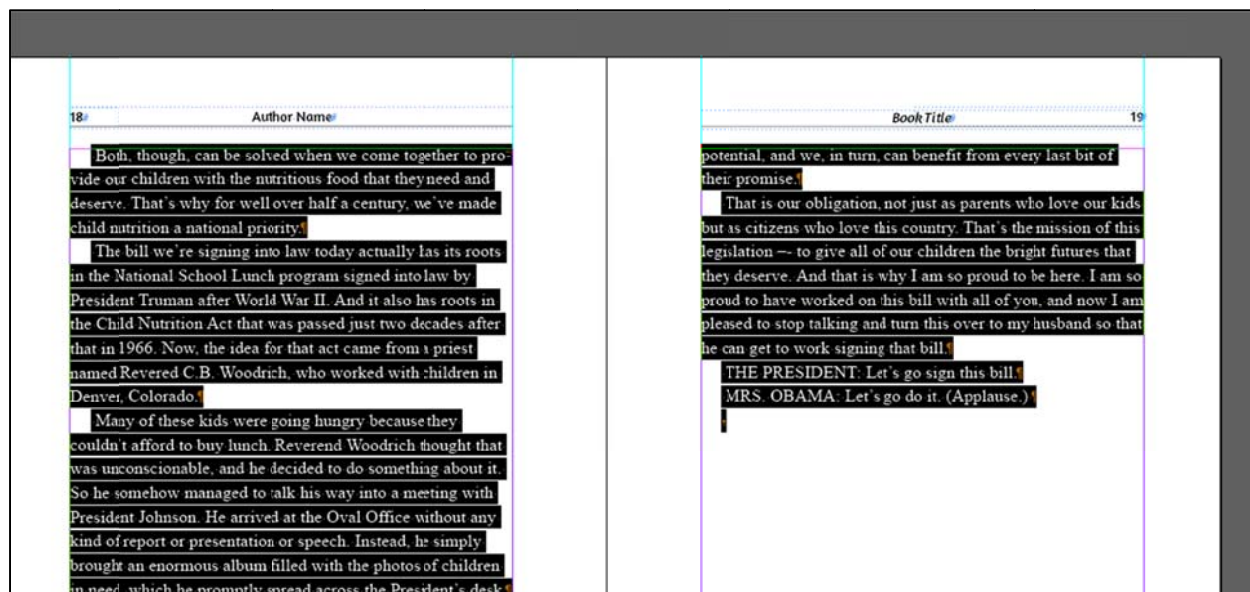
With your text placed into the template, you are now ready to begin styling the text and applying master pages.

Step 5: Style the Text and Assign Master Pages

Now that you have your book's text in the template, you must apply paragraph styles to each type of text to automatically format it to have the correct line spacing, font, size, and layout. This process is easy, and there are a few repeatable steps for each chapter you should follow.

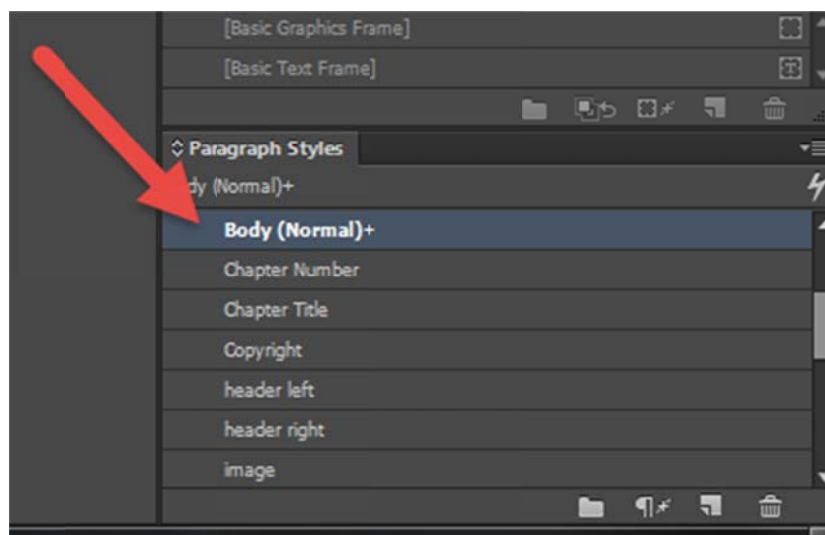
The first step to perform is to highlight all of the text you just placed in the template.

You can drag your mouse over the text from the start of your manuscript to the end.

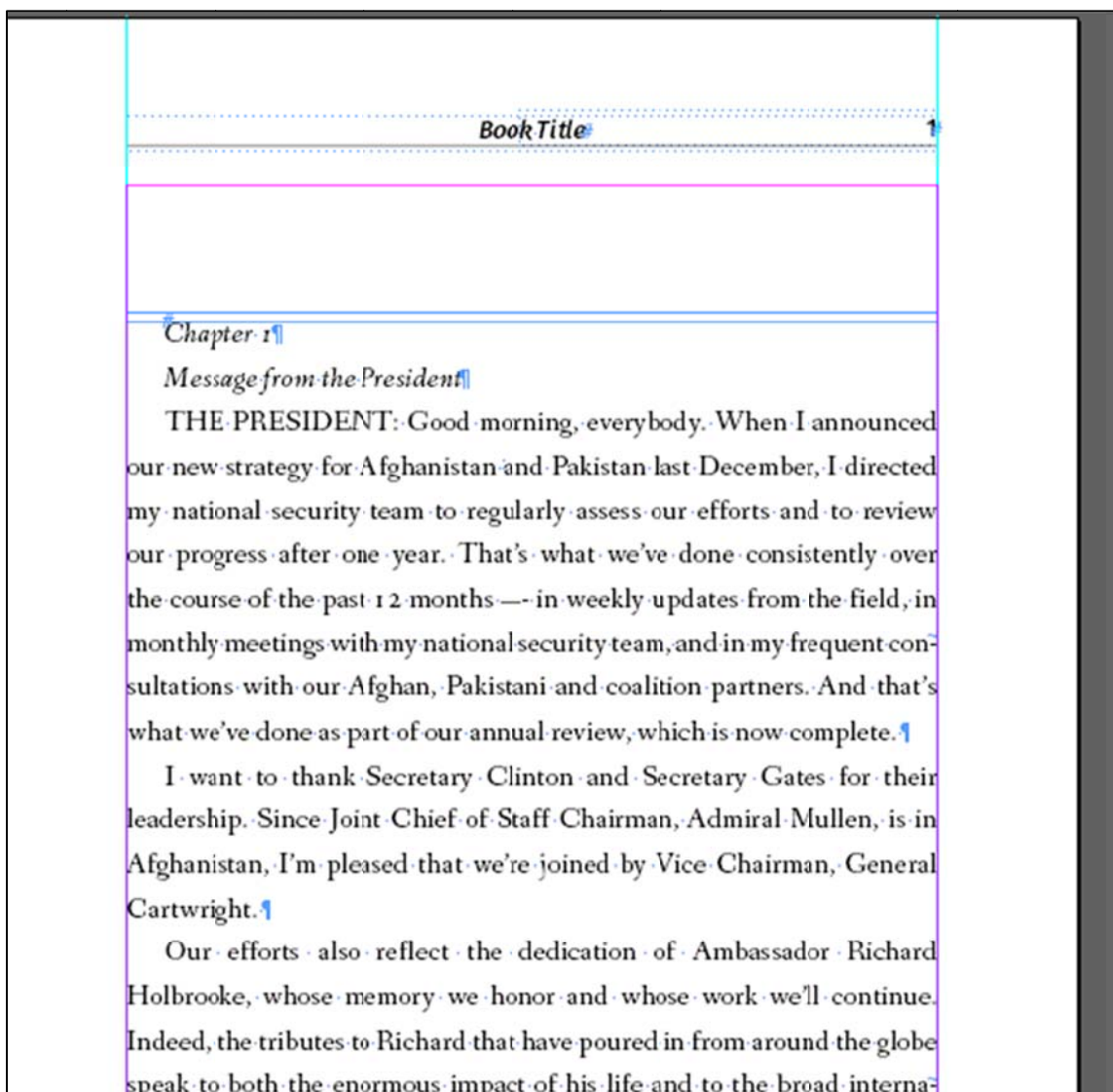


Next, you must apply the Body (Normal) paragraph style to the text.

With the text highlighted, click "Body (Normal)" from the paragraph styles menu.



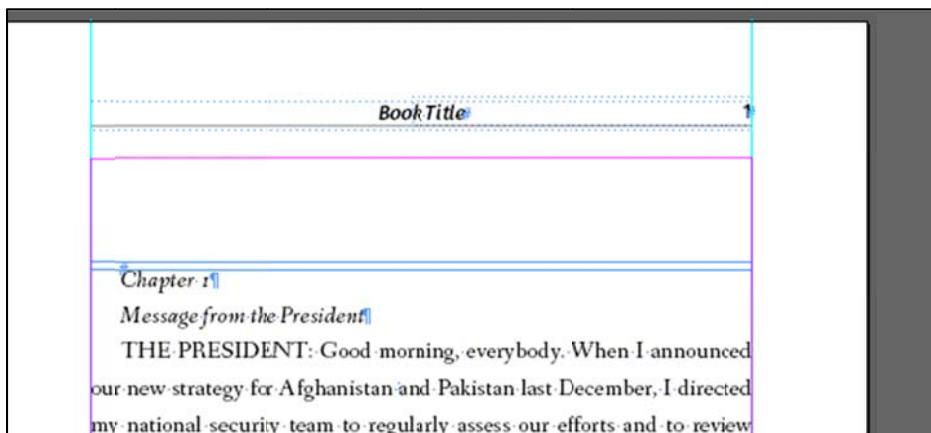
This will automatically format the bulk of your book for you, by applying the bulk of the font and spacing styling needed for the body of the book. It also justifies the text and applies the necessary hyphenation for the text.



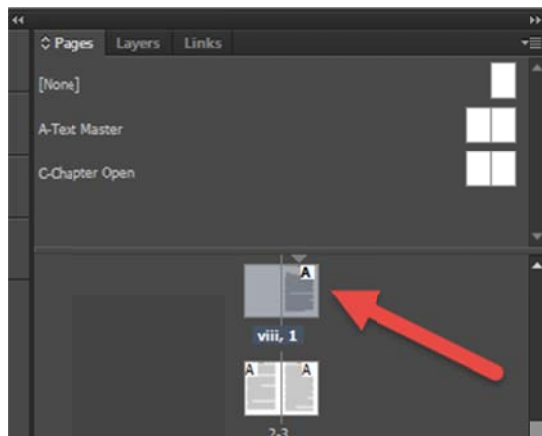
Next, you will start going through each chapter and applying the correct styles for the chapter number, chapter name, and first paragraph. You will also apply the “C” “Chapter Open” style to the chapter opening pages.

This process must be repeated for each chapter in the book.

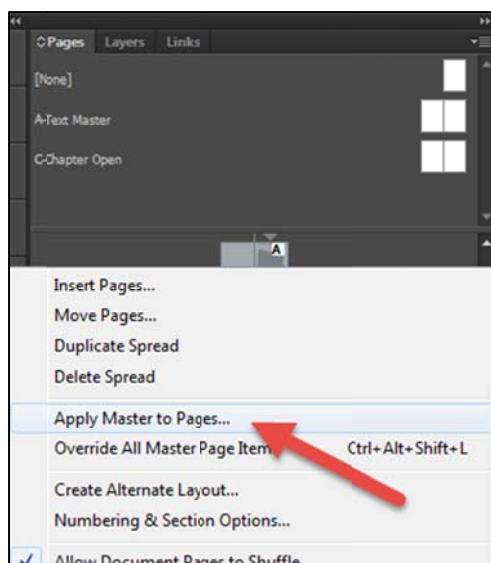
Scroll back up to Chapter 1, Page 1, (Or your Preface / Introduction chapter).



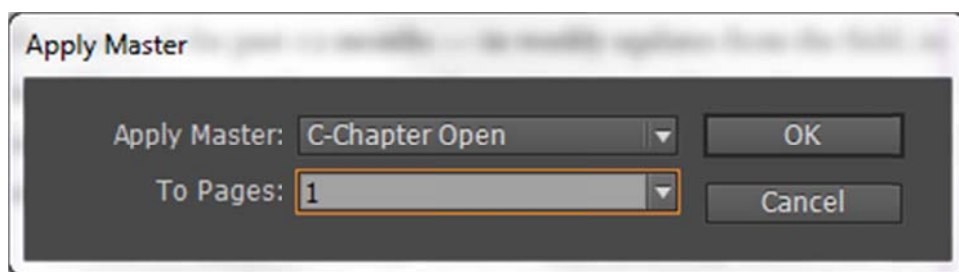
First, apply the "C" "Chapter Open" Master page to this page. Click on page 1 of the book on the pages menu.



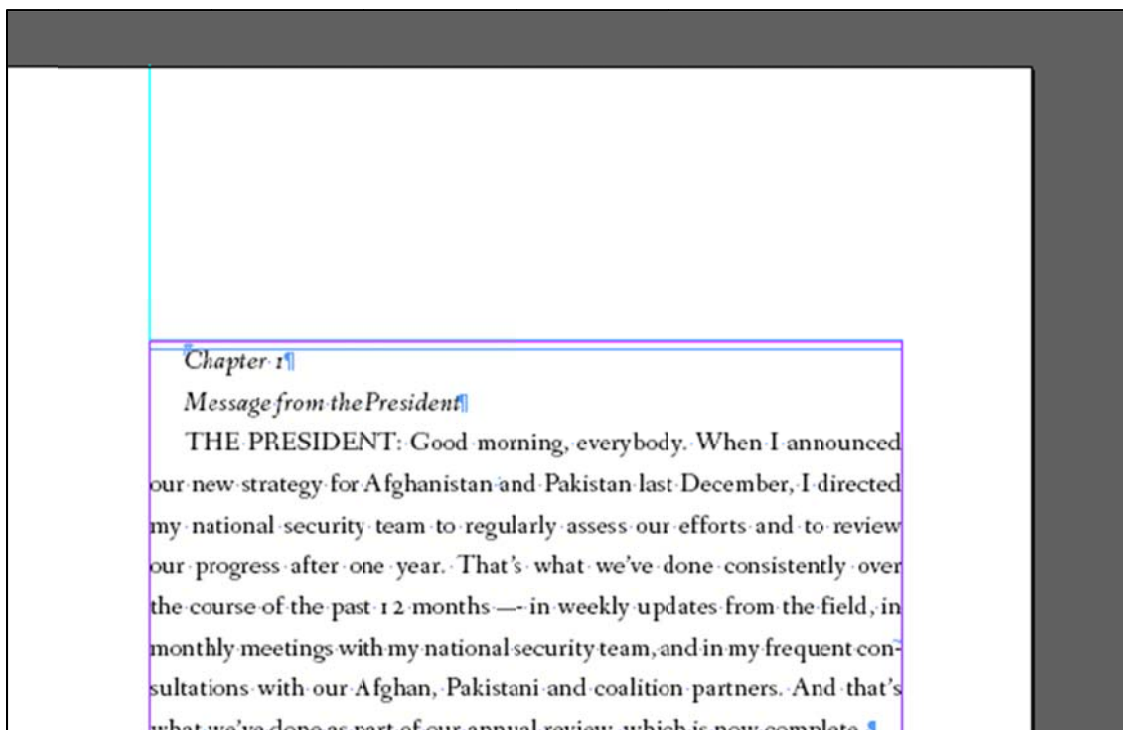
Right click or two-finger click the page. Click "Apply Master to Pages".



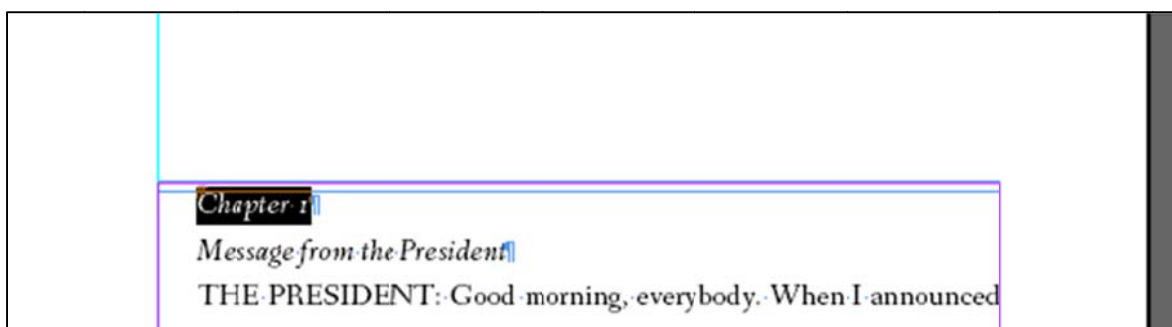
Choose "C-Chapter Open" and enter 1 in the "To Pages:" field. Press OK



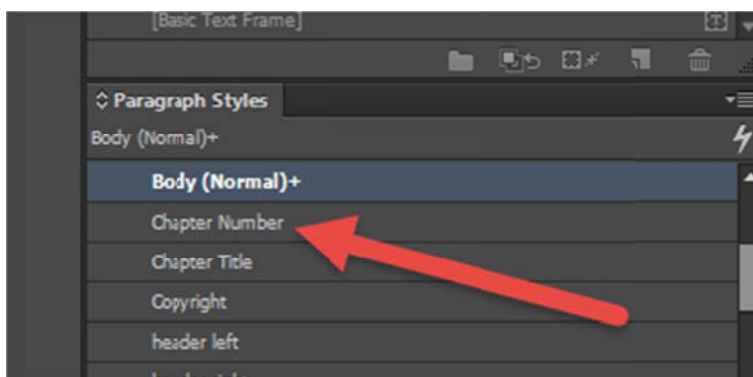
This will reformat the page to remove the running head and set the page to be a chapter opener.



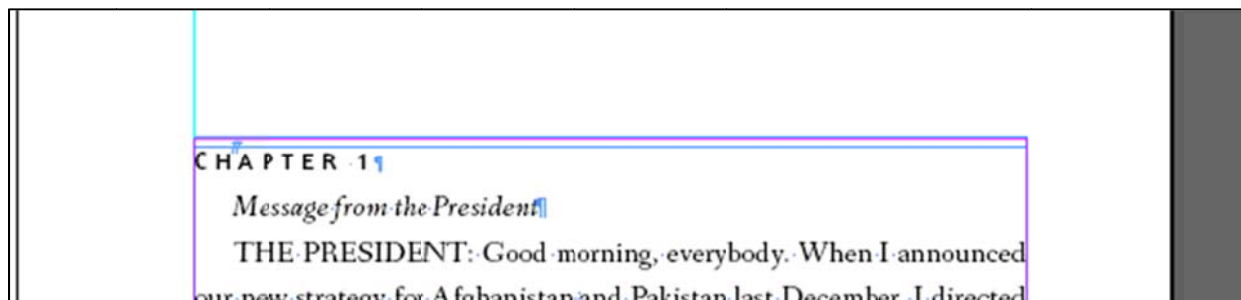
Next, highlight the chapter number if you have one.



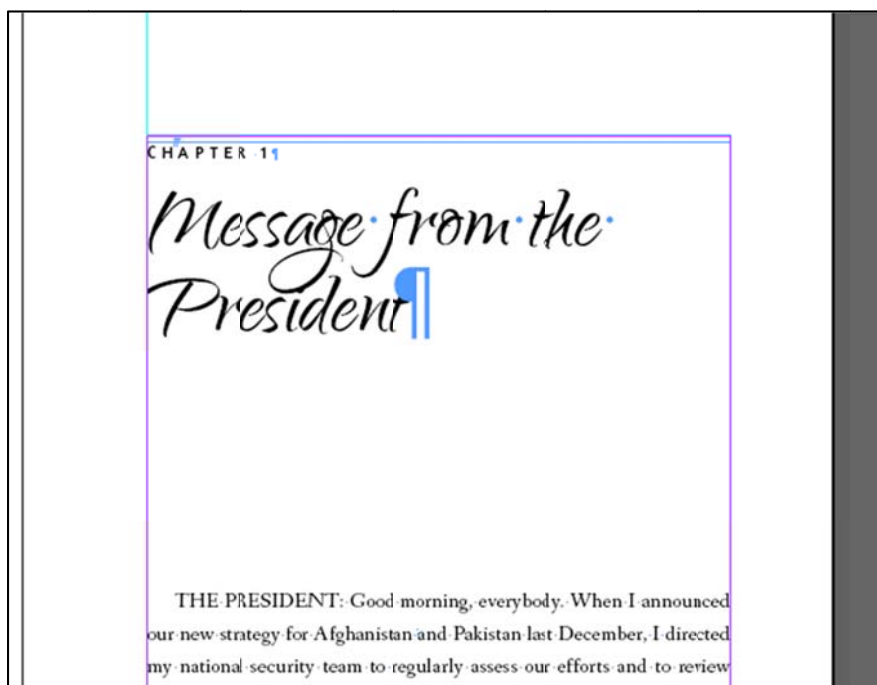
Apply the “Chapter Number” style from the Paragraph Style menu.



This will style the chapter number in the template.

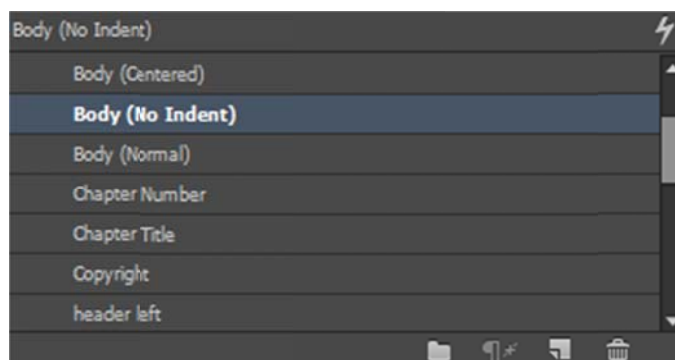


Next, highlight the chapter name, and apply the “Chapter Title” style.

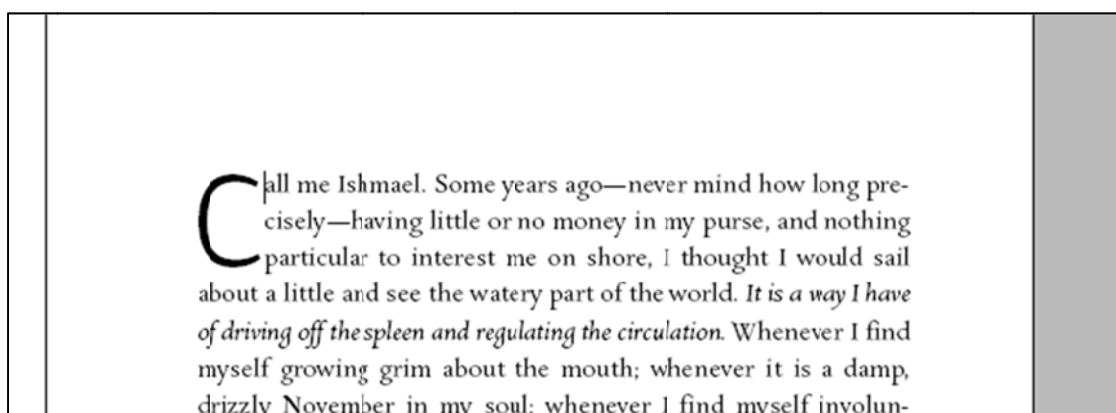
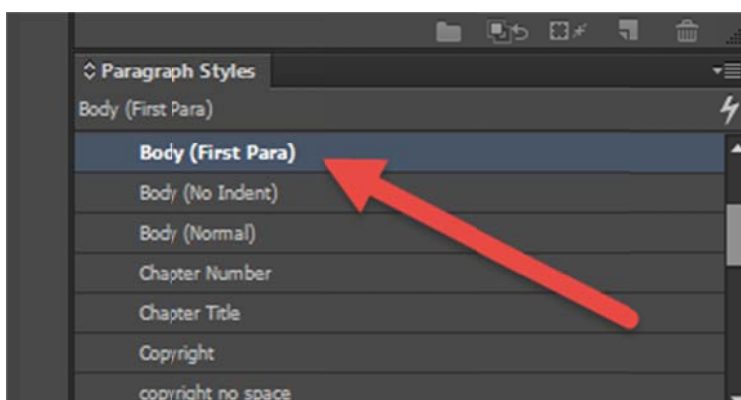


This will format out the chapter name with its own text and spacing.

Next, highlight the first paragraph of the chapter and select the “Body (No Indent)” style to remove the indent from the paragraph.

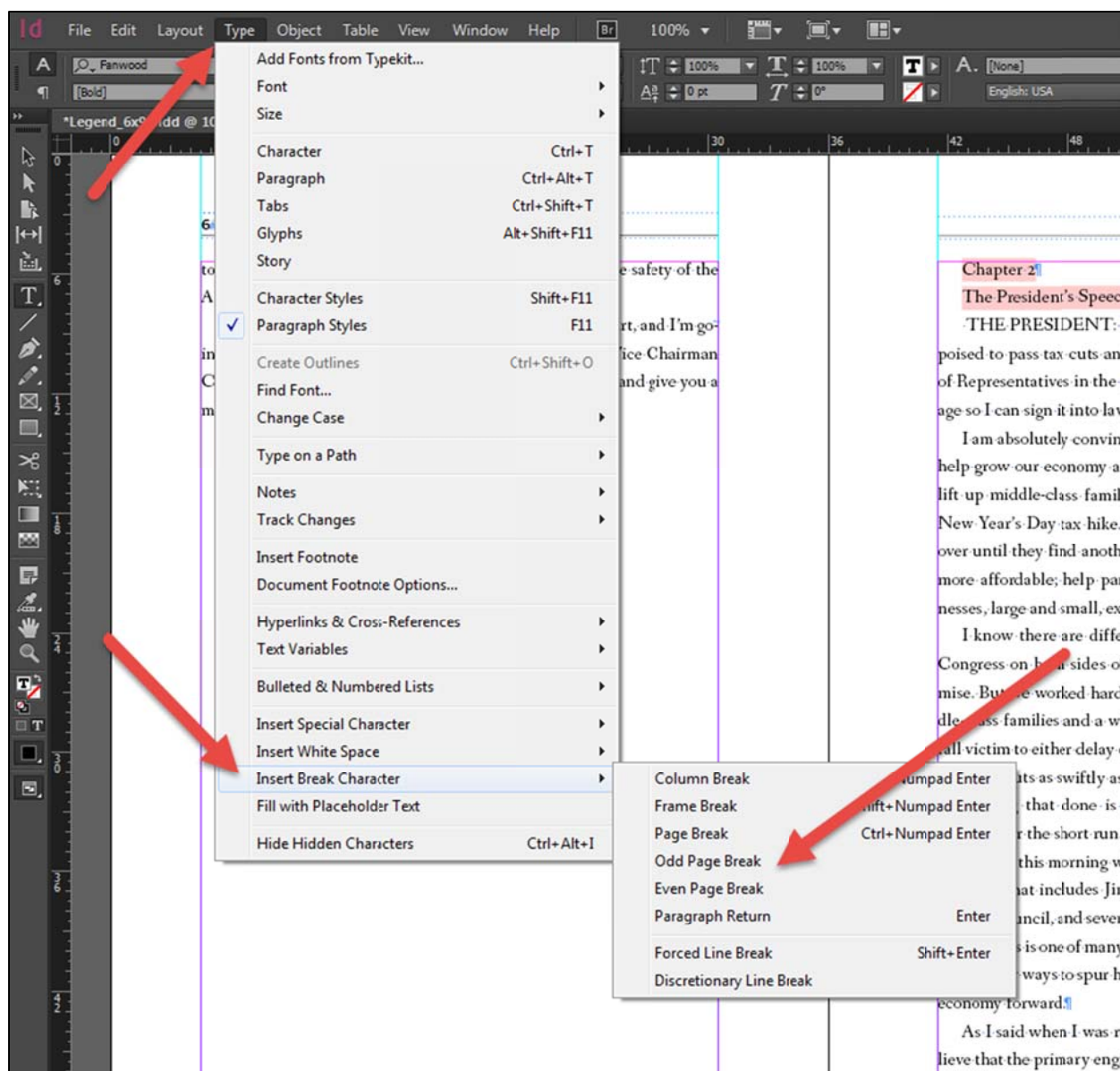


Optionally, some templates include a “Body (First Para)” style that will apply a drop cap into the first paragraph of the chapter.



There is an array of styles that you may use to format the text in the template. Some useful styles include Body (Center), and Quotation, which can be used to style any paragraph in the book.

After you have styled the text of the chapter as you like, you may end the chapter using a pre-defined break symbol. You can select one by clicking "Type" on the top menu, "Insert Break Character", and then one of the break options.



The most popular options are the simple "Page Break", which ends the page and moves to the next page, and the "Odd Page Break" which inserts a blank page if needed, to assure that the next page starts on a right-hand page in the book.

The process of applying the chapter mast page, applying styles, and breaking the chapter should be repeated for every chapter in the book.

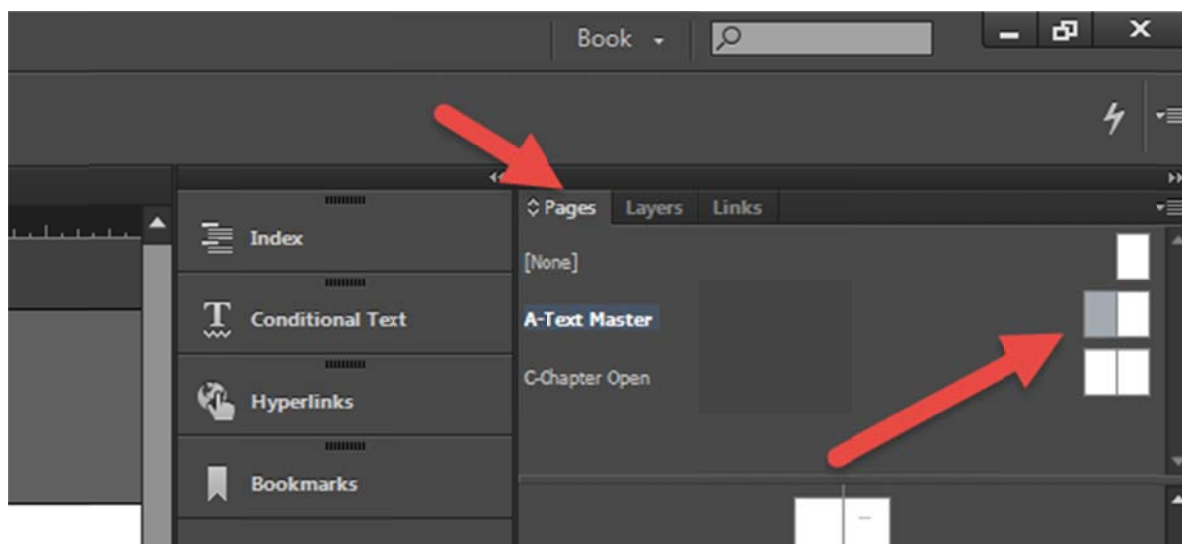
Step 6: Cleanup of the Book File

We recommend a thorough review of the entire book file before going to print. Though the techniques to apply master pages and styles deliver consistent results, you may find an omission or area that requires an hands-on approach to formatting.

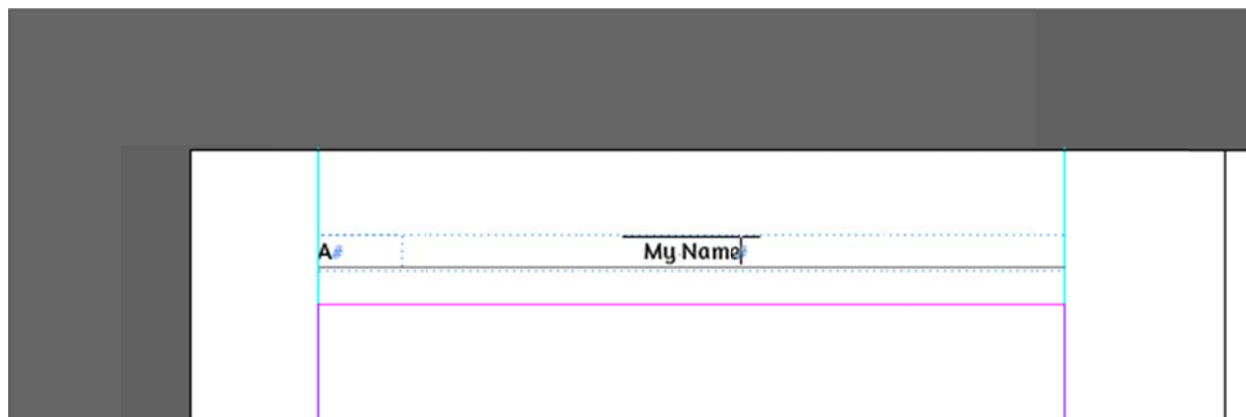
There are a few minor clean up items that should be performed for every book.

First, you should change the running heads to include the author name, and the title of the book.

Double click on the “A-Text Master” page to open it for editing.

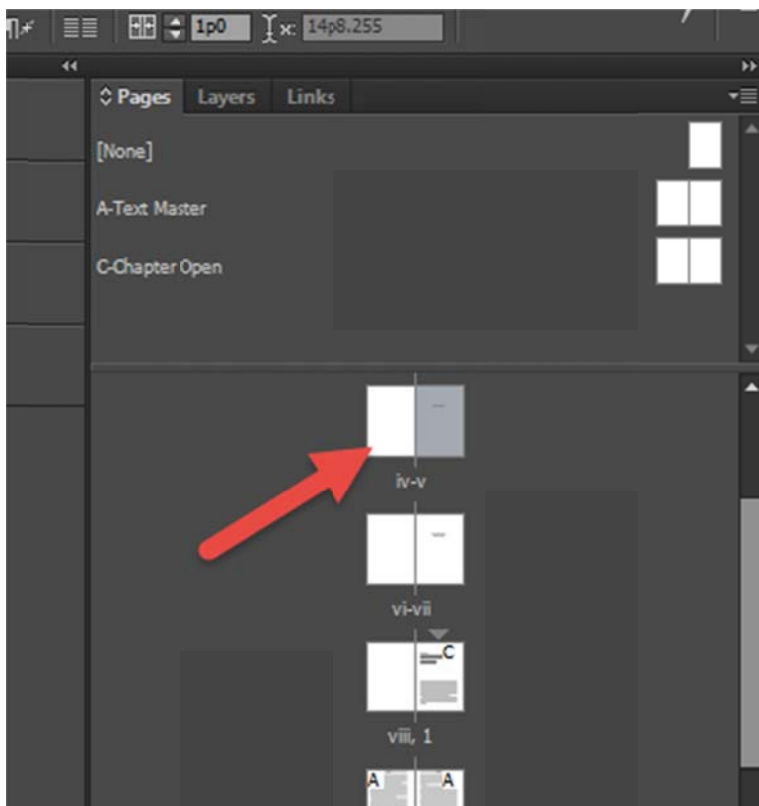


Then change the Author Name and Book Title.

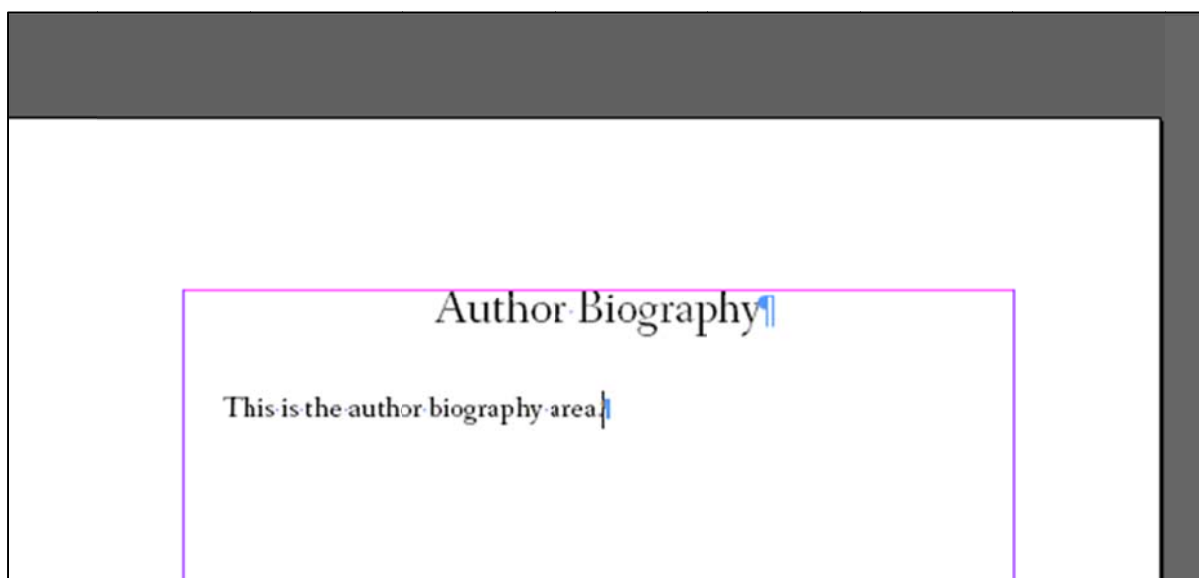


The entire book will automatically update with the change.

Once you have finished editing the headers, you can exit editing the master page by double clicking on any page in the book.



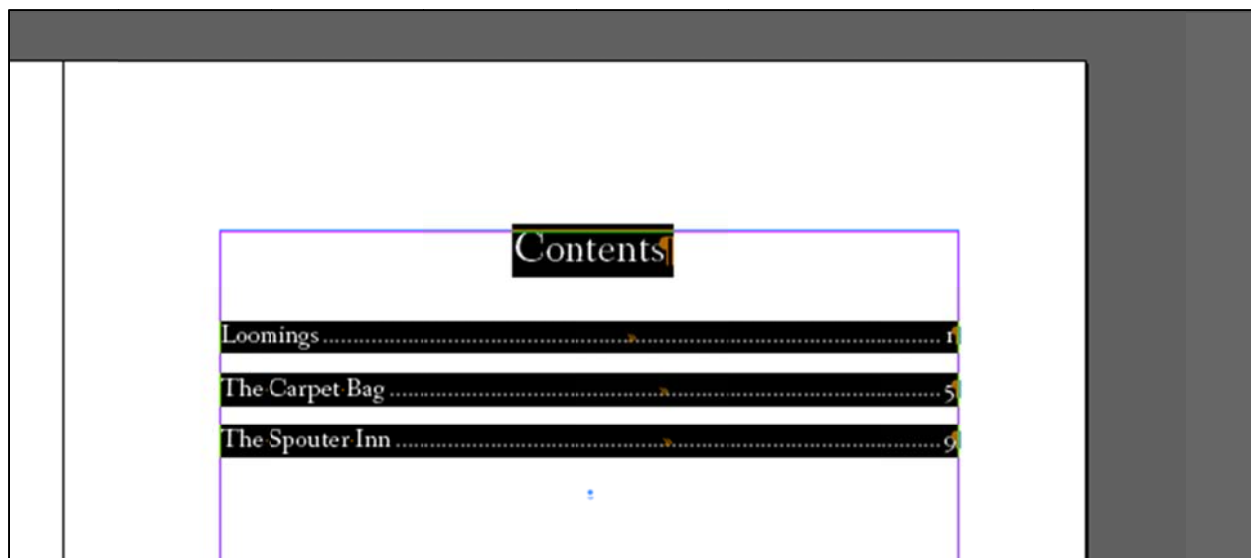
You can also add in any autho bio or back matter pages safely.



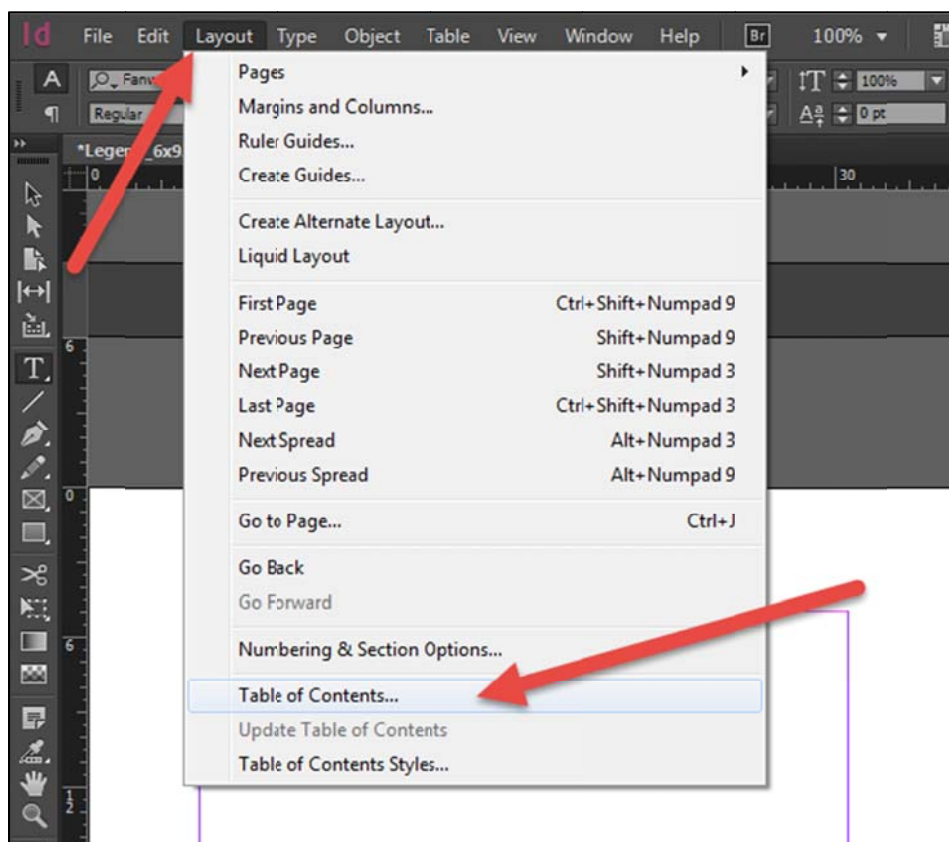
The “Matter Title” style can be used here to style the title text on any of the pages in the back of the book. You can also use the “[None]” master page style here to remove running heads.

Next, you can update the Table of Contents.

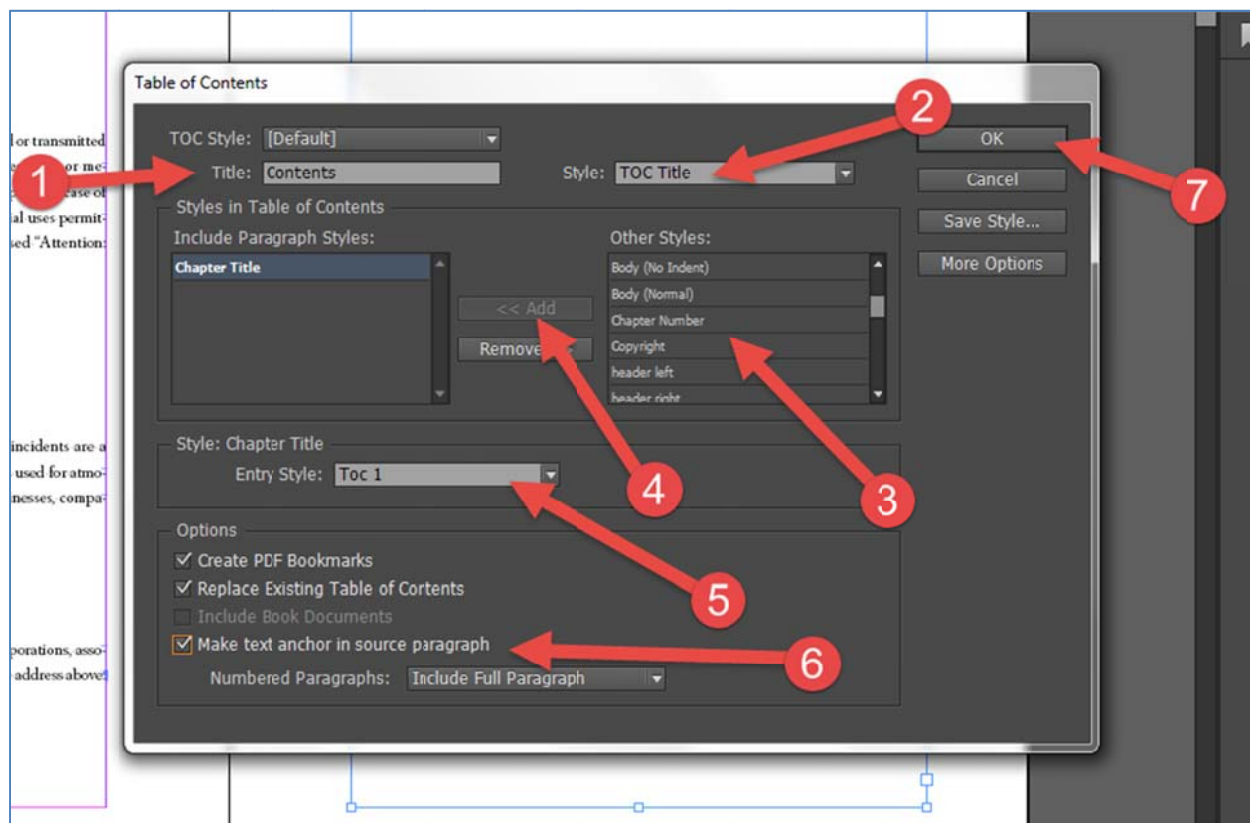
Highlight the stand-in table of contents, and press delete to remove it.



Next, click Layout on the main menu, and click Table of Contents.

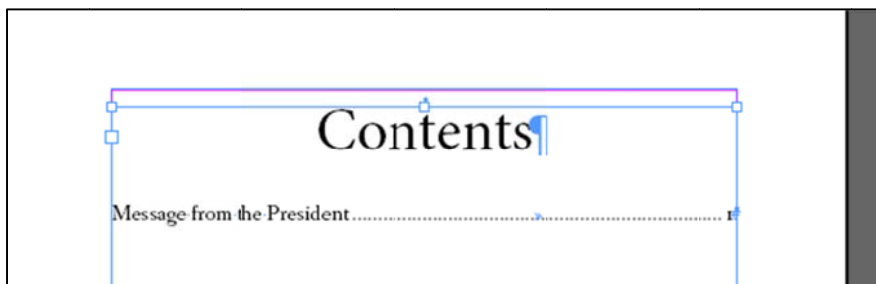


Now you must select several customizable options to layout the Table of Contents to suite your specific needs.



- 1) Enter the title for the Table of Contents. (Contents is most common).
- 2) Select "TOC Sytle" from the drop down.
- 3) Choose the styled text that will be listed in the TOC. Most books will list the Chapter Titles in the table of contents, but you may choose to also include chapter numbers, subheadings, or other styled text. Choose as many as you like here.
- 4) Press Add to add the styles that will be included in the TOC from your selections in step 3.
- 5) Select "Toc 1" from the drop down.
- 6) Check "Make text anchor in source paragraph".
- 7) Press OK

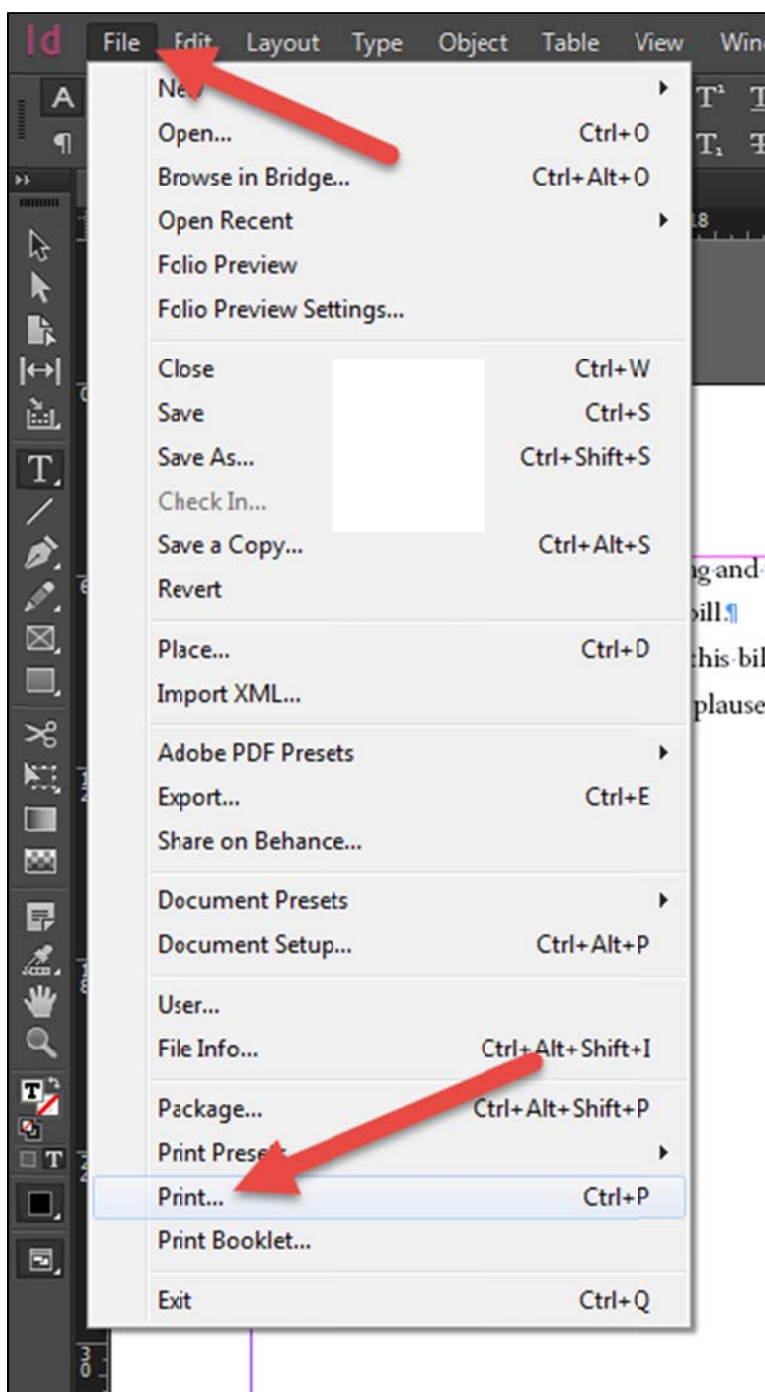
You will then be presented with a special mouse cursor. Click near the top of the Contents Page to place the TOC.



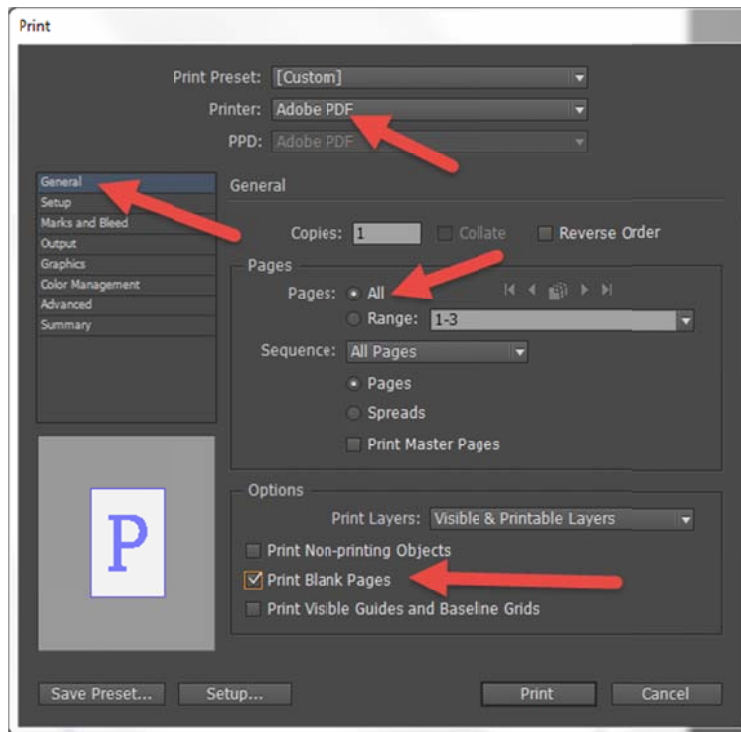
Step 7: Creating the PDF for Print and the ePub for eBook

Creating a great looking PDF for print can be simply accomplished using InDesign and Adobe Acrobat (Pro or Standard). We recommend using only genuine Adobe Acrobat to create your PDFs, to be certain you meet the requirements of the printers.

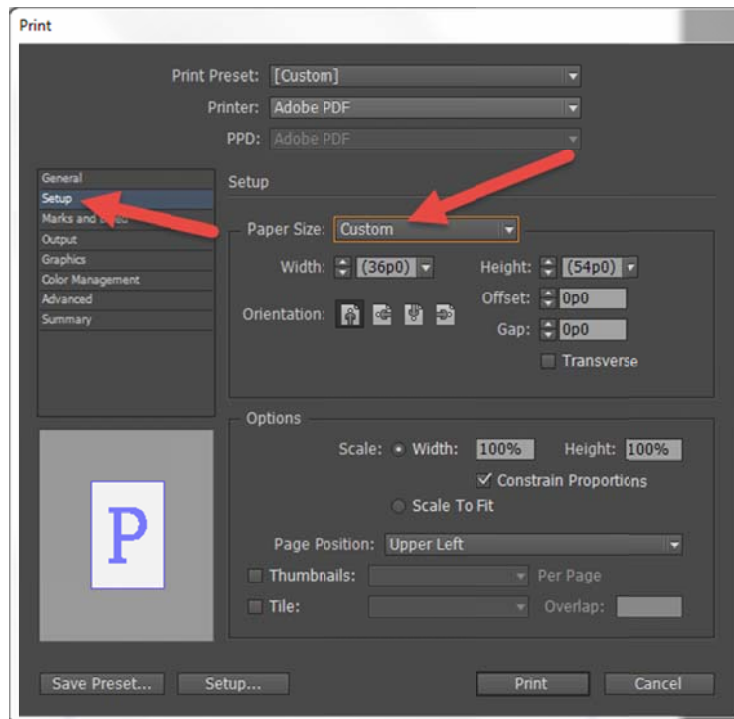
To create a PDF of the book, select File, and Print.



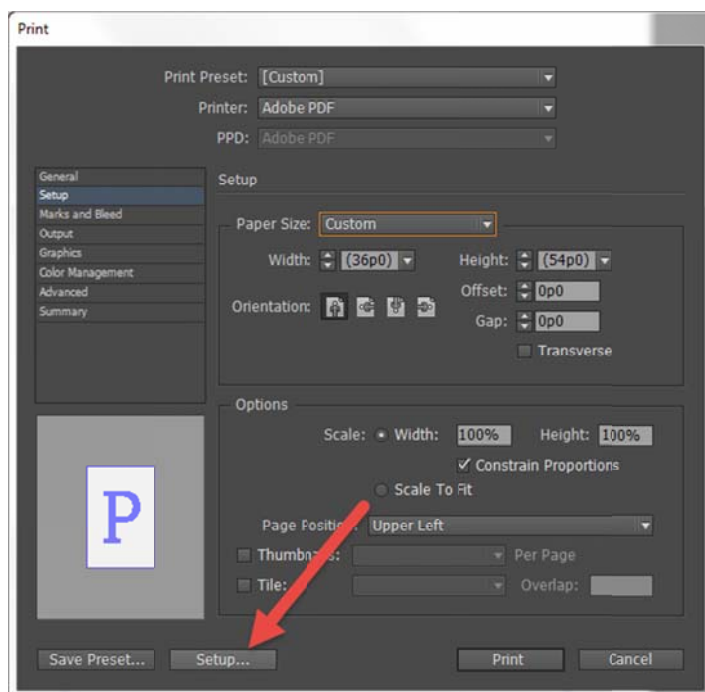
Next, on the General Tab, select “Adobe PDF” as your printer. Select “All” for the Pages, and check “Print Blank Pages”.



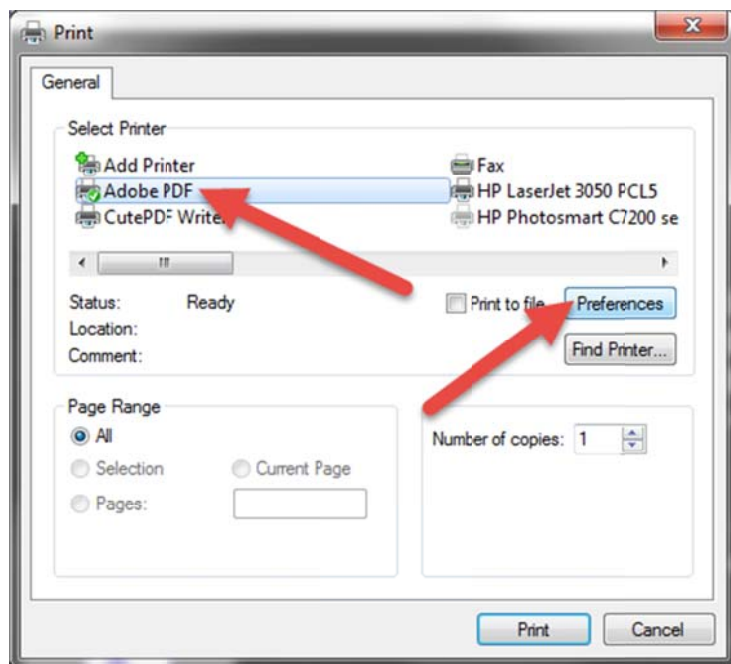
On the Setup Tab, Select “Custom” for the paper size, and make sure that the width and height match your trim size.



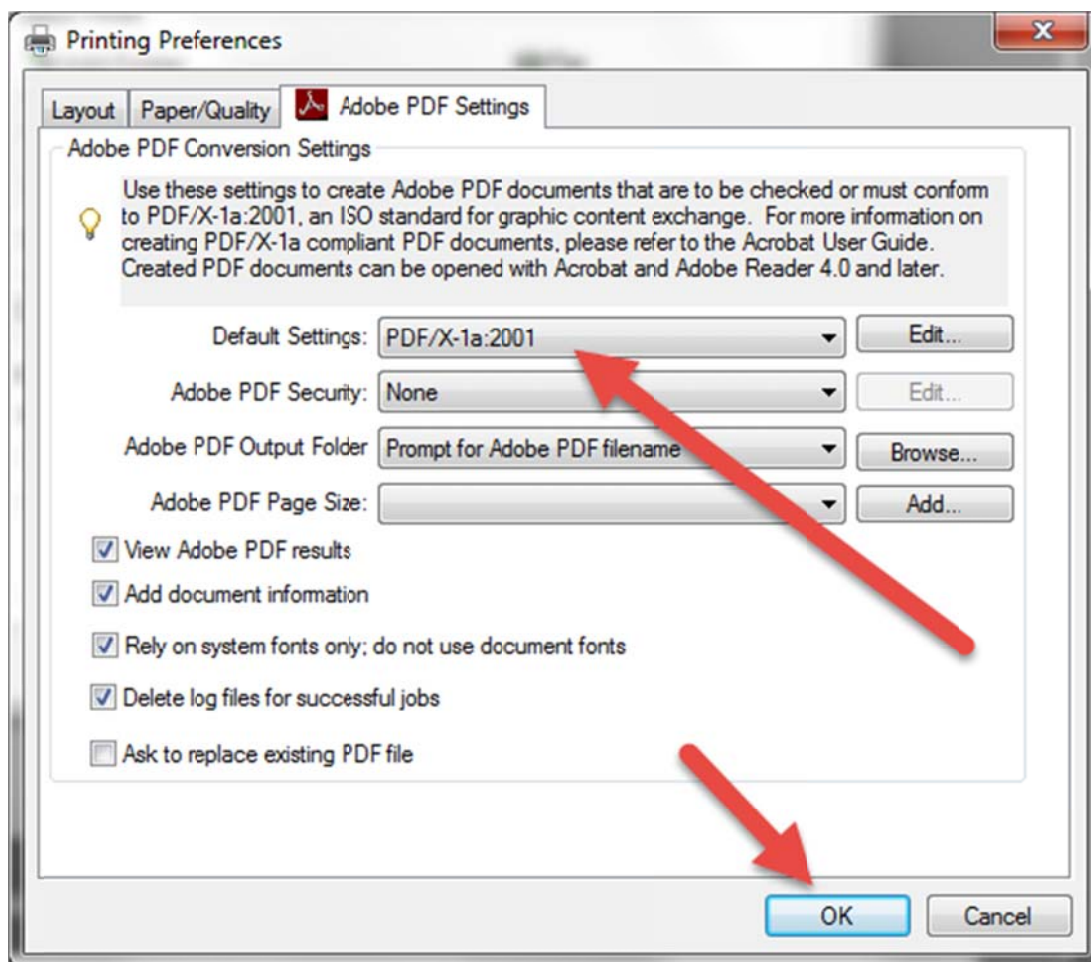
Click "Setup"



Highlight the "Adobe PDF" printer, and click "Preferences".

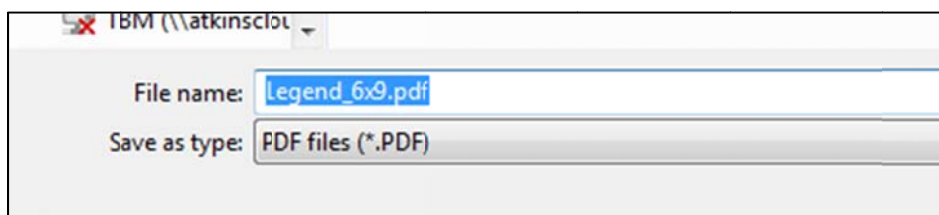


In the Default printer settings, choose “PDF/X-1a:2001”

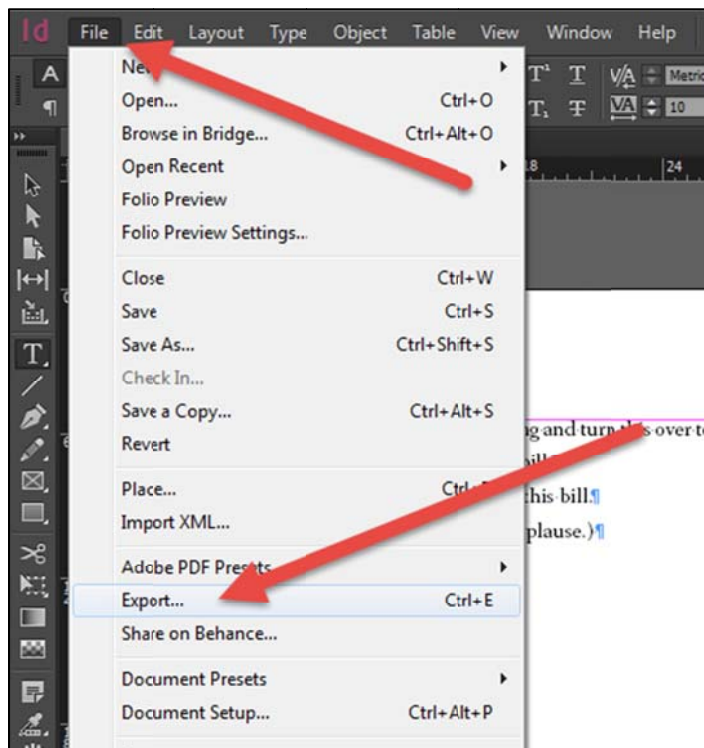


Press OK.

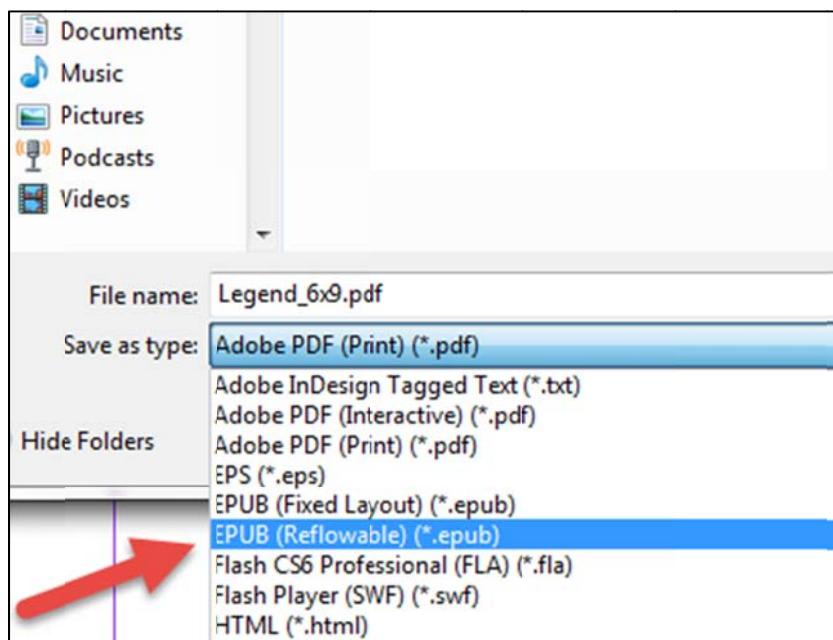
You may now print to a PDF file and save it to your computer.



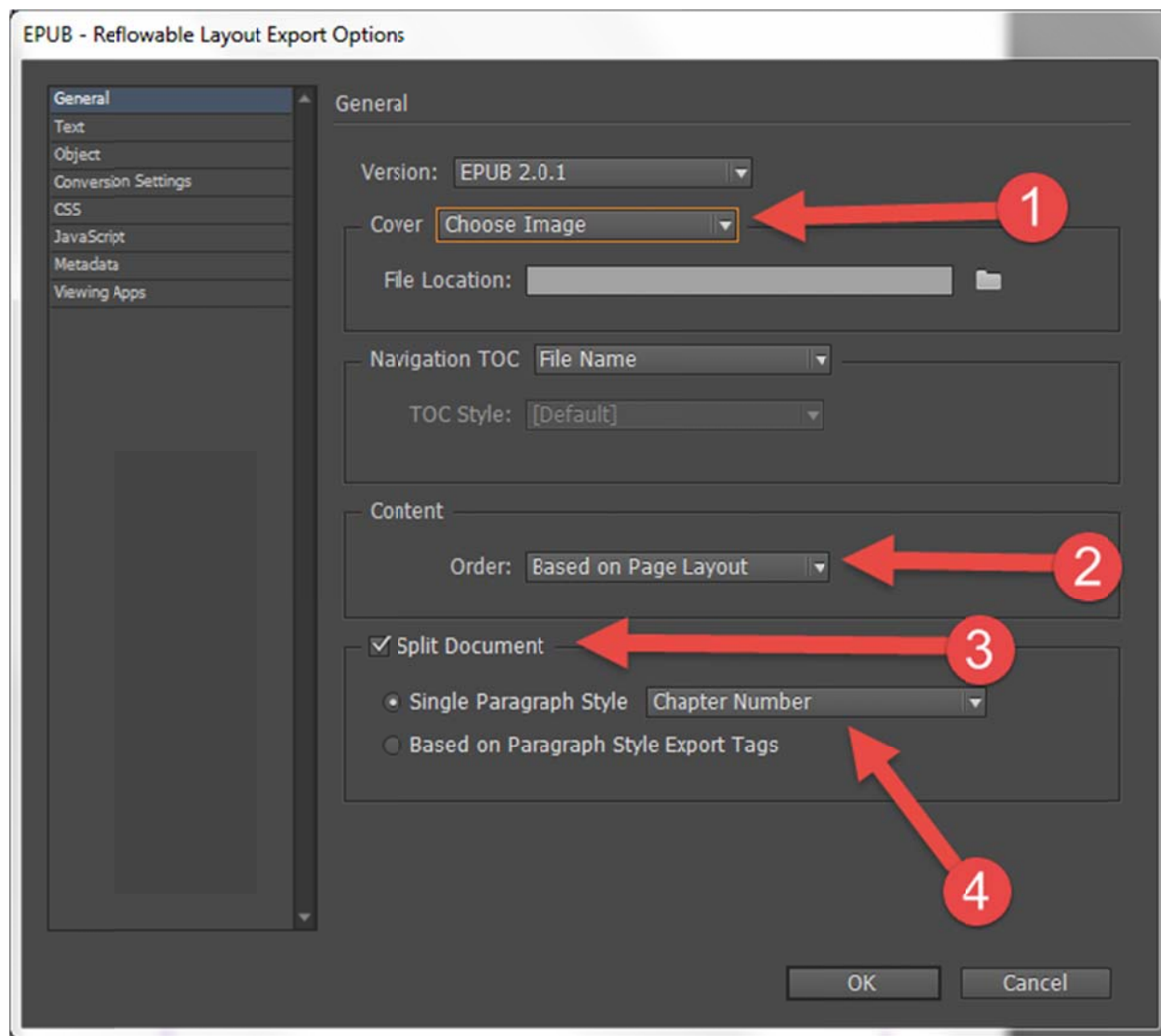
To export to an ePub file for eBook use, you must select “File” and “Export” from the main menu.



Choose “ePub (Reflowable)” from the save file as type;



Select several key options from the Export Settings;



- 1) You may include a cover file by selecting it here, and setting the cover to "Choose Image".
- 2) Content should be ordered "Based on page Layout".
- 3) Check "Split Document".
- 4) Choose "Single Paragraph Style, and select "Chapter Number" from the drop down. If you do not have chapter numbers in your book, select "Chapter Title:".

Press "OK" to generate an ePub file.

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