

How to Export Your Book as ePub and Mobi file formats with Microsoft Word and Calibre

This basic tutorial will offer you some guidance on how to prepare your Microsoft Word file for export to the ePub format, and how to use Calibre to convert your ePub file to the Mobi format. The ePub format is readable by: the Kobo eReader, the Blackberry Playbook, the Barnes and Noble Nook, Sony eReaders, various Android and Linux devices, and many others. The Amazon Kindle supports the Mobi format.

The screenshots shown in the tutorial use Microsoft Word 2007 and 2010 for Windows, Microsoft Word 2011 for Mac OSX, and Calibre 1.29.0 for Mac OSX and 1.29.0 for Windows. If you are using different versions of the software, some of the instructions and screenshots will be slightly different, but hopefully you can find the right feature in your software version.

What is Calibre?

Calibre is a free, open-source e-book management application that is available for Mac, PC, and Linux. With Calibre, you can organize and manage an astounding number of different e-book file types in your library and sync them directly to a wide variety of personal devices. There is a small amount of e-book editing that can be accomplished with Calibre, such as adding additional metadata. You can also convert DRM restriction-free e-books between different file formats.

Take advantage of other Calibre support documents and tutorials:

[Calibre](http://calibre-ebook.com): <http://calibre-ebook.com>

[Calibre tutorials](http://calibre-ebook.com/help): <http://calibre-ebook.com/help>

[Calibre demo](http://calibre-ebook.com/demo): <http://calibre-ebook.com/demo>

The Tutorial is Broken up into Sections:

1. Preparing your Word document
 - Bookmarking your Chapter Heads
 - Adding Hyperlinks
2. Converting to the ePub and Mobi formats with Calibre
3. What do I do next?
4. I need more help!

For your convenience, we have created a few template files for different standard book sizes to make your layout work easier. You can find these templates under the **TITLE MANAGEMENT** section of your publisher menu under **BOOK PRINTING**. Choose the link called *Preparing your book for print*.

If you plan to produce both print and digital editions, it will be more time efficient to set up your book files to print specs first, and then produce a digital book from the same files.

(For more information about the mechanics of setting up your Word file, e.g., importing and styling text, and inserting art, see the DriveThru tutorial for Microsoft Word in the *Preparing your title for digital download* menu in the link for **TUTORIALS**.)

Preparing your Word document

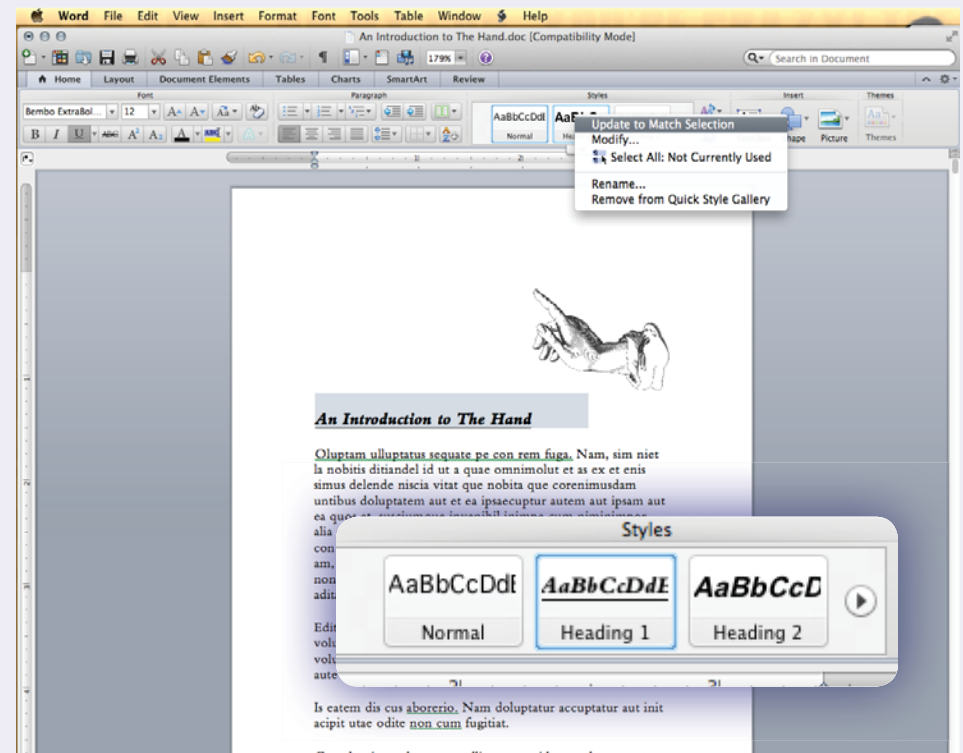
This tutorial begins after you have completed flowing and formatting your Microsoft Word file. You may have already prepared your file for print, exporting it as a PDF. PDFs are fixed format, meaning the text and images stay locked in place and do not reflow as the page is enlarged or reduced. This is vastly different from the ePub format.

In the file format family, ePubs are unruly and reckless little brats. ePubs are book files written with XHTML and CSS, which, like web sites, make them fluid and ever-changing. The exact same file will appear differently from device to device, depending on the physical size of those devices and their user-imposed settings. They will never, ever look exactly the same. Do not let this aggravate you.

To prepare your file for the odd behavior differences, you may need to eliminate some formatting you imposed, or make some choices to exclude certain elements that exist in the print or PDF versions of your book.

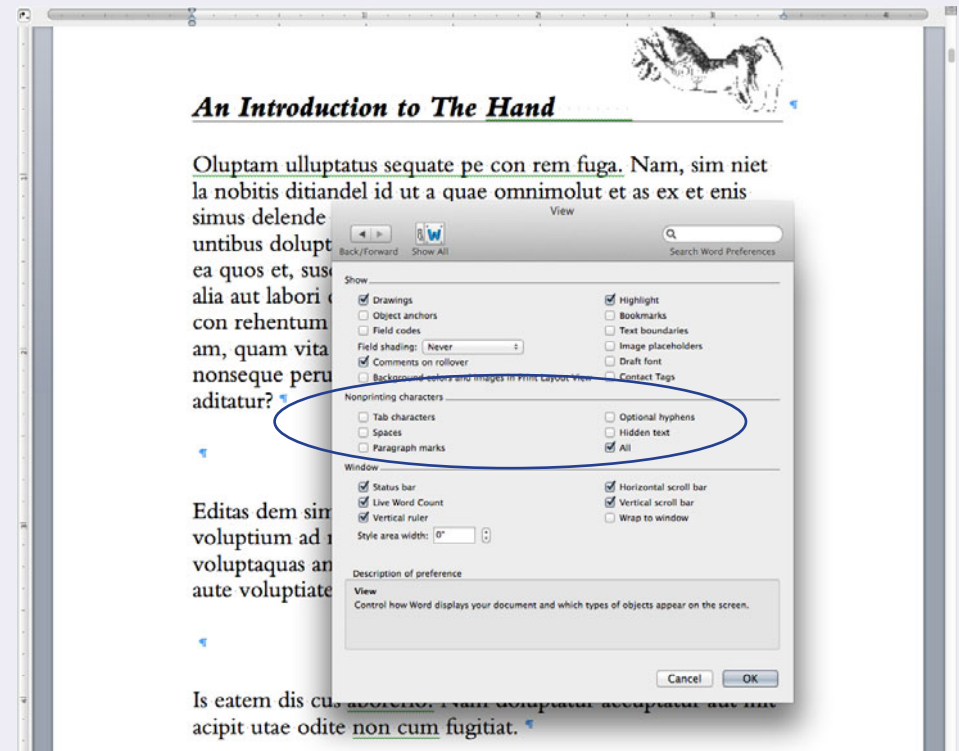
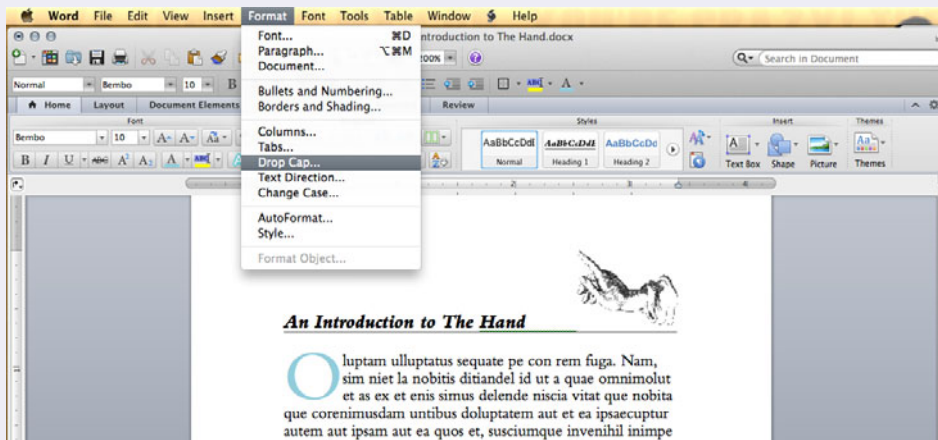
Here is a list of problematic formatting and page elements that need to be addressed in your file, if they exist:

- All chapter heads should be globally (machine) formatted using paragraph styles from the Style menu, not locally (or manually) formatted; You don't have to use Word's default choice of type or size... You can make and save a custom style, and you *should* use it to style all your chapter head text. Just make sure the styles are named Heading 1 for chapter heads and Heading 2 for sub-heads, etc. Later, this will be translated into Style Sheet information on export from Word.
- Automatic page numbering must be stripped out; Since book pages will reflow from device to device, fixed page numbering becomes inaccurate, irrelevant and confusing.
- All headers and footers should be eliminated from the file.
- Chapter breaks must be stripped out; Chapter breaks will be autogenerated on export based on your global chapter head formatting, as previously mentioned.
- Don't despair, because some local (manual) formatting is okay; If you have text in the paragraphs of your book that is manually formatted as italic or bold, those should transfer just fine.



Preparing your Word document (continued)

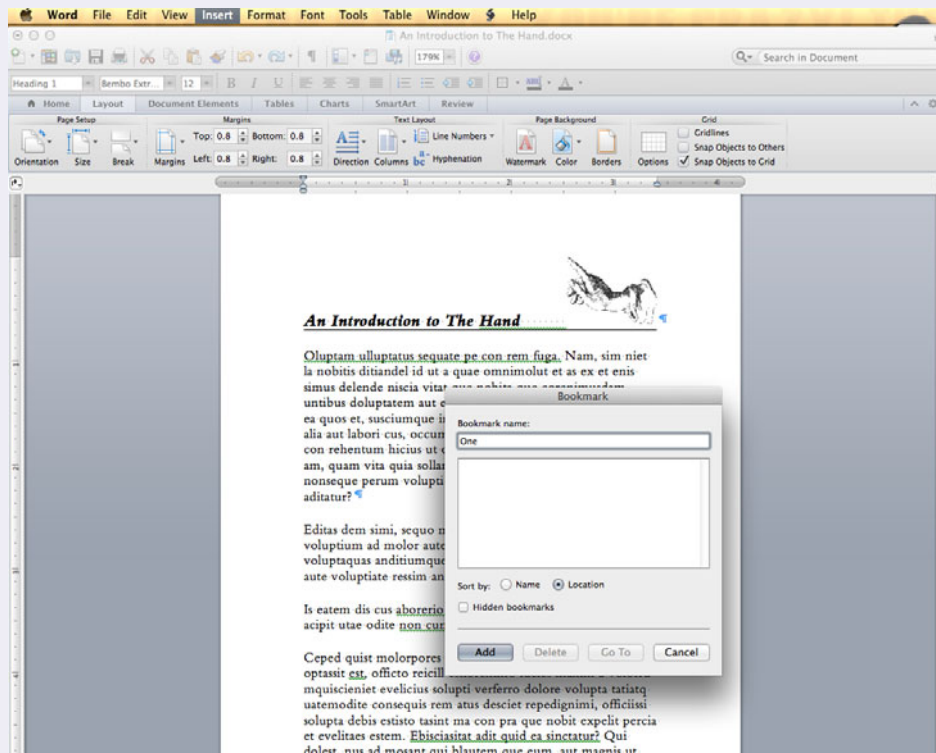
- Make sure all the illustrations that occur throughout your file are anchored to the specific location they need to appear; When exporting an ePub, your images can shift around to some surprising places when left with no specific instructions. If you have not assigned places where your images should appear in relation to text or other objects, the export process will use its own logic in deciding where to put them. For example, images that should always appear next to certain paragraphs in your Word file may be bumped to the end of the chapter because the export process doesn't know exactly where else to put them. The solution for reigning in this chaos is to anchor your image objects.
- If your file contains layers for images, eliminate any background borders, background colors or background images; The ePub format does not support layers, and will include and shift these images around in your output file.
- Eliminate any text placed in text boxes; Do not use text boxes to position text.
- Eliminate any drop caps in your file text; Do not use drop caps at the start of each chapter or anywhere else in your document.
- Eliminate different color text; All text should be black.
- If your file was built using a multi-column layout, revise this to a single column layout.
- Make sure any hyperlinks to URLs are correct and unbroken.
- Turn off track changes, autoformat, and autocorrect functions.
- Turn on and view nonprinting characters in your document and correct any formatting issues, like extra tabs, extra spaces, inconsistent paragraph spacing, etc.; Open your Word application preferences, open <View>, then select <All> Nonprinting characters.



Preparing your Word document (continued)

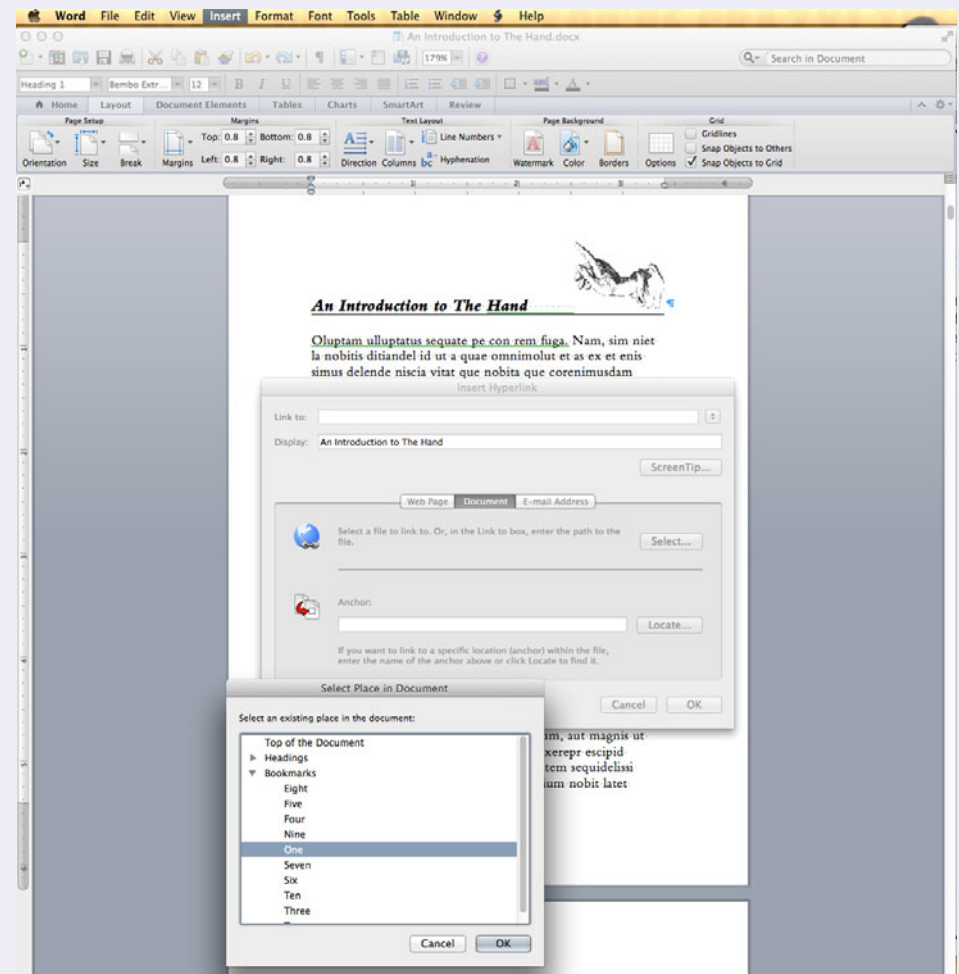
Bookmarking your Chapter Heads

After you've globally styled all your chapter heads, go through your Word document and begin bookmarking them. Navigate to the first text you want to bookmark in your document and select it with your cursor. Then, pull down the <Insert> menu and open <Bookmark...>. Using one word, name your bookmark something appropriate, and make sure it sorts by <Location>. Click <Add>. Continue this with the rest of the chapter heads throughout the document.



Adding Hyperlinks

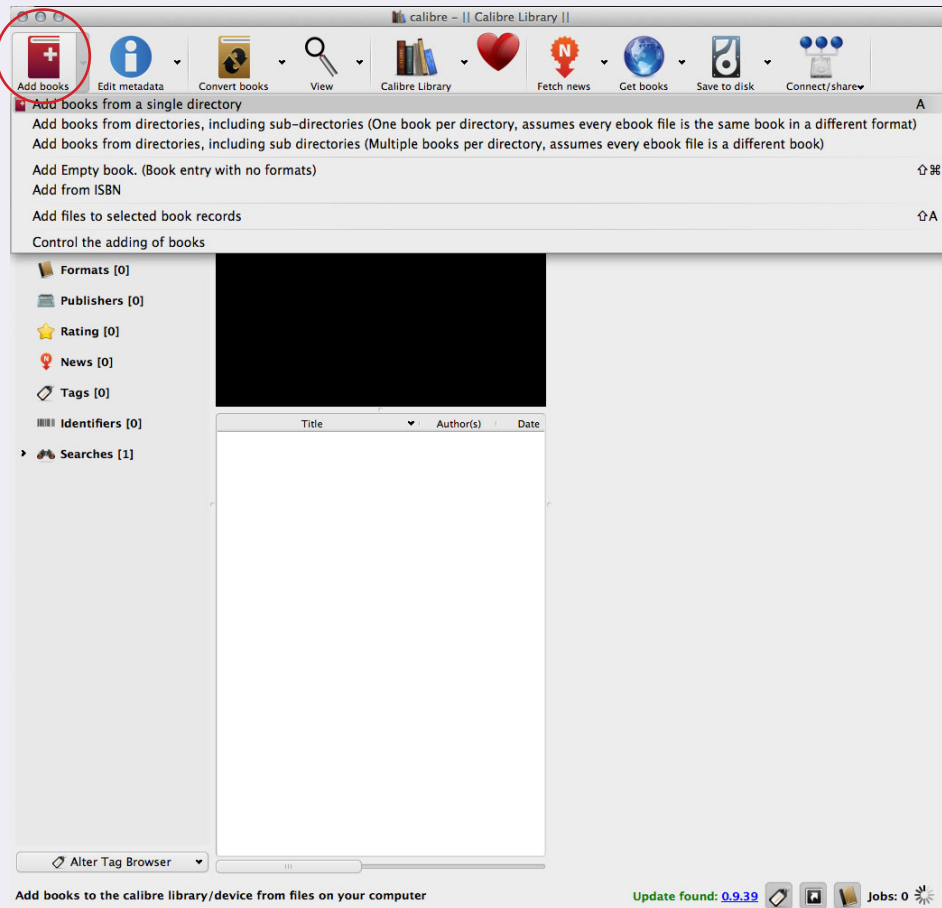
Now that you've bookmarked all of your chapter heads, you can turn them into link locations. Go back to the first bookmark you've made, select it, pull down the <Insert> menu again, and choose <Hyperlink...>. The *Insert Hyperlink* dialog box will open. Choose *Document*, then next to *Anchor:*, click the <Locate...> button. In the next dialog box, select the correct bookmark for this location.



Converting to the ePub and Mobi formats with Calibre

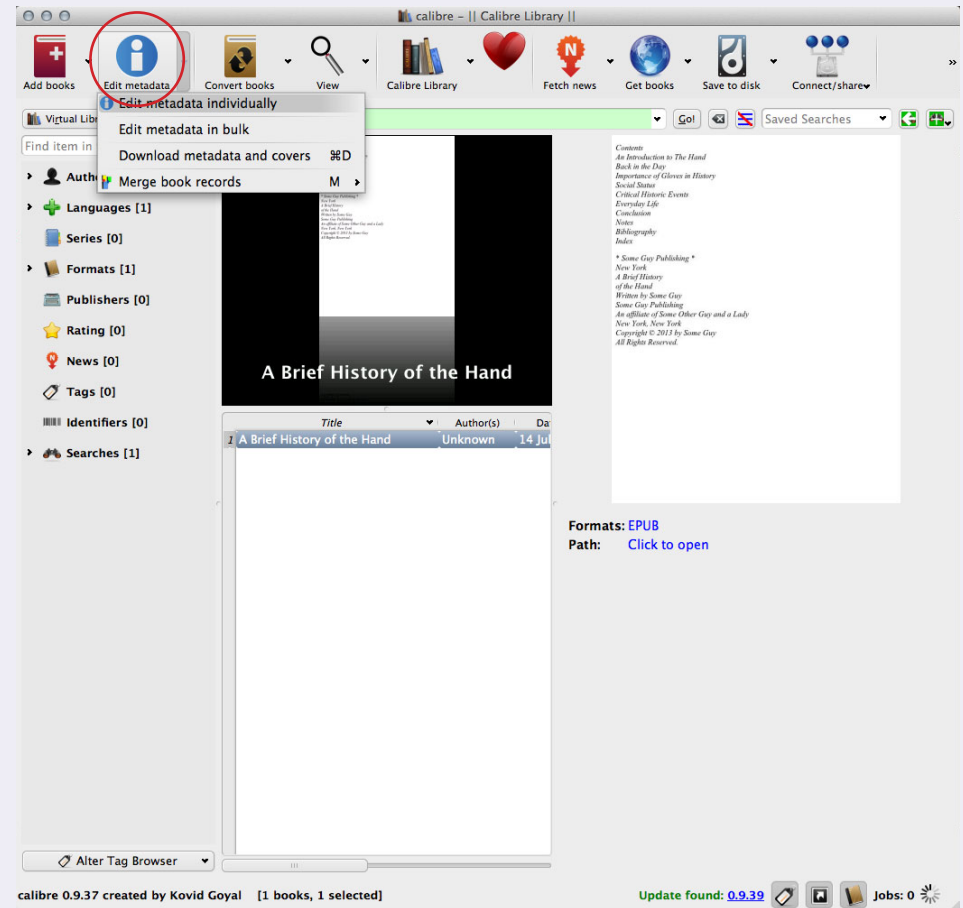
Save your file as a Word (2007 or later) document, then export the file as a filtered web page (.html, .htm). This is the file you will import into Calibre to convert to ePub and Mobi formats.

Open Calibre. First, add your HTML file to your Calibre library. Click the <Add books> button at the top-right corner and then navigate to the location of your HTML file on your computer. Select the file to add it. While Calibre adds this file, you will see a temporary dialog box open, telling you that Calibre is working on the task.



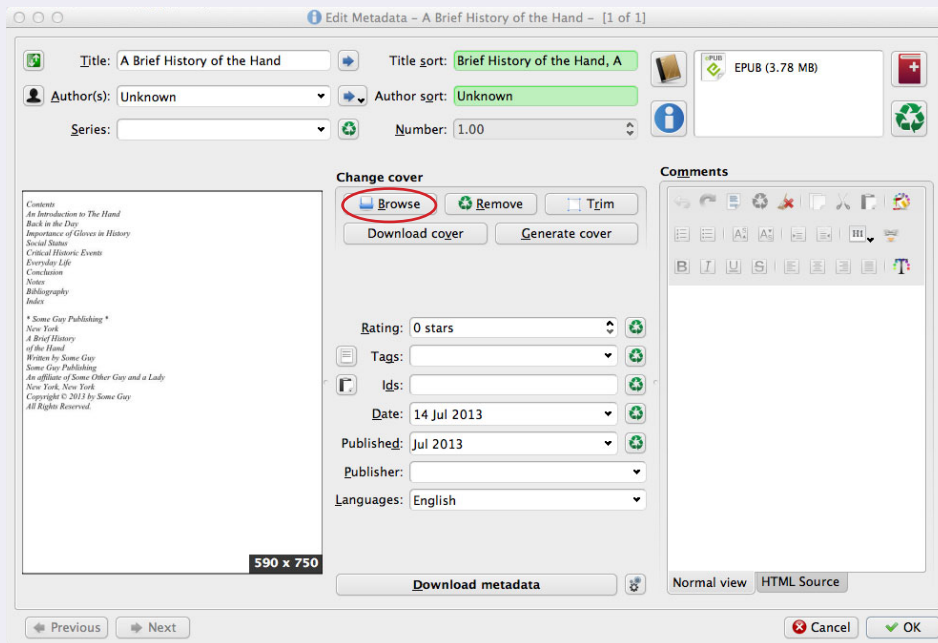
When Calibre has completed processing the file, your book title will appear in your library list.

After you have added your file, you will need to double-check your book's metadata. Click the second icon at the top of your window, <Edit metadata>.

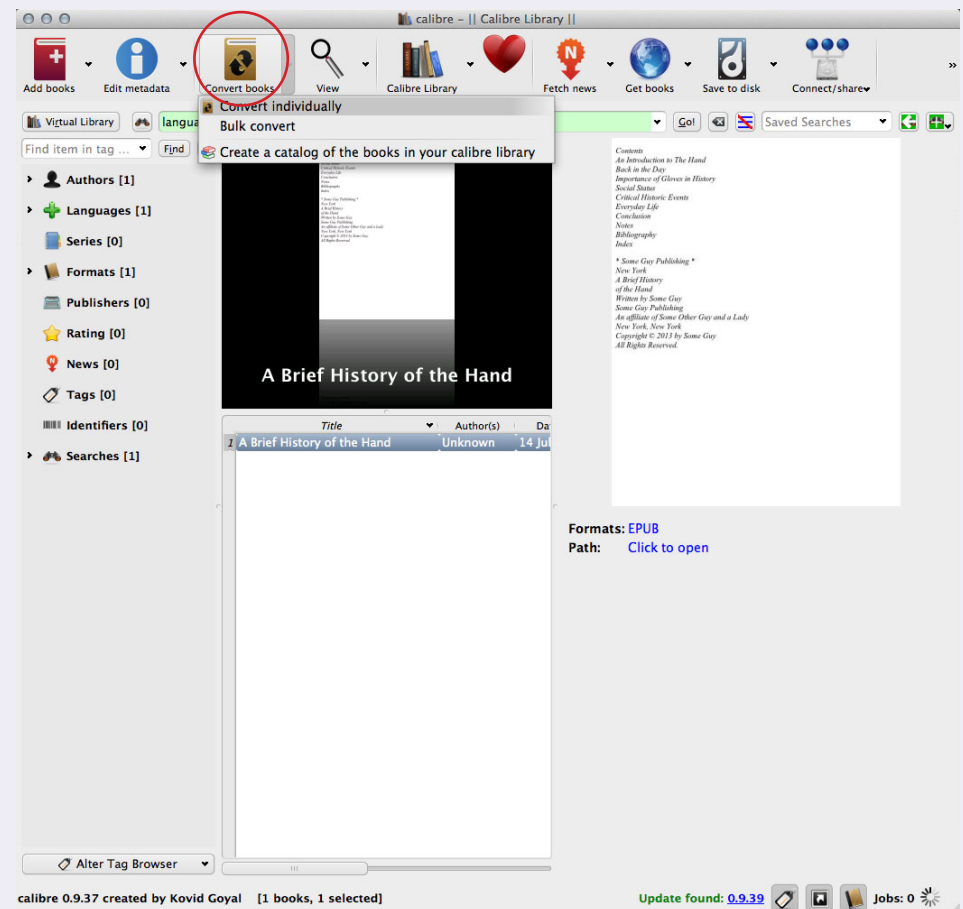


Converting to the ePub and Mobi formats with Calibre(continued)

A dialog box will open. You can proceed with updating your book's information here. You can add additional tags and even add publication dates. To insert your cover image, click <Browse> under the *Change cover* options, then navigate to the location of your JPG file on your computer and select it. Click <OK> to save when you are finished.



After you have updated your metadata, you can begin converting your book. Click the <Convert books> icon at the top of your window.



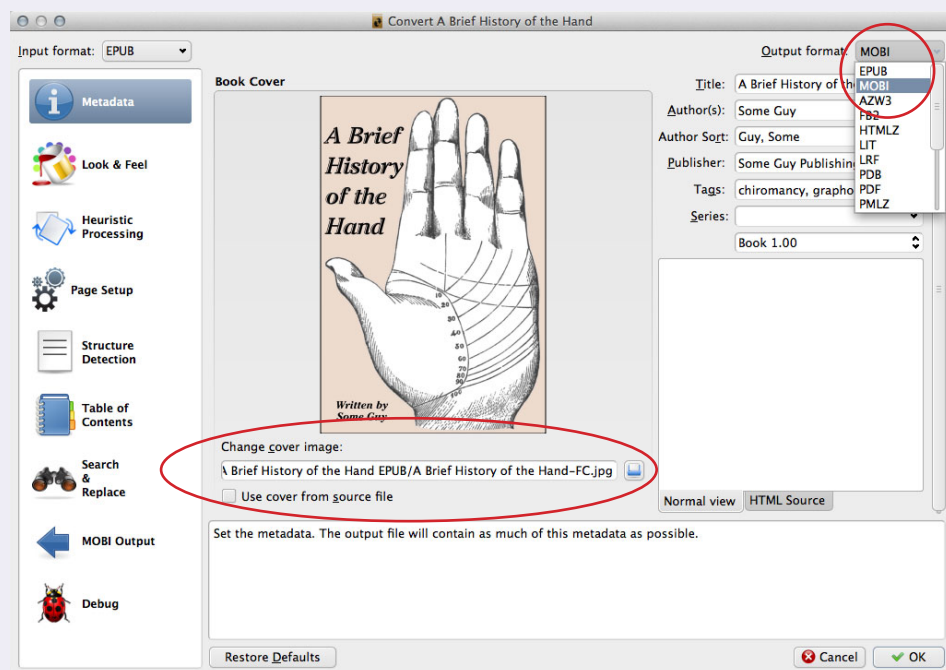
When the *Convert* dialog box opens, there are more adjustments you can make to your file before processing.

Converting to the ePub and Mobi formats with Calibre(continued)

On the left-hand side, there will be a list of tabs that you will click to provide more specific format setting information. The default tab opens with <Metadata>.

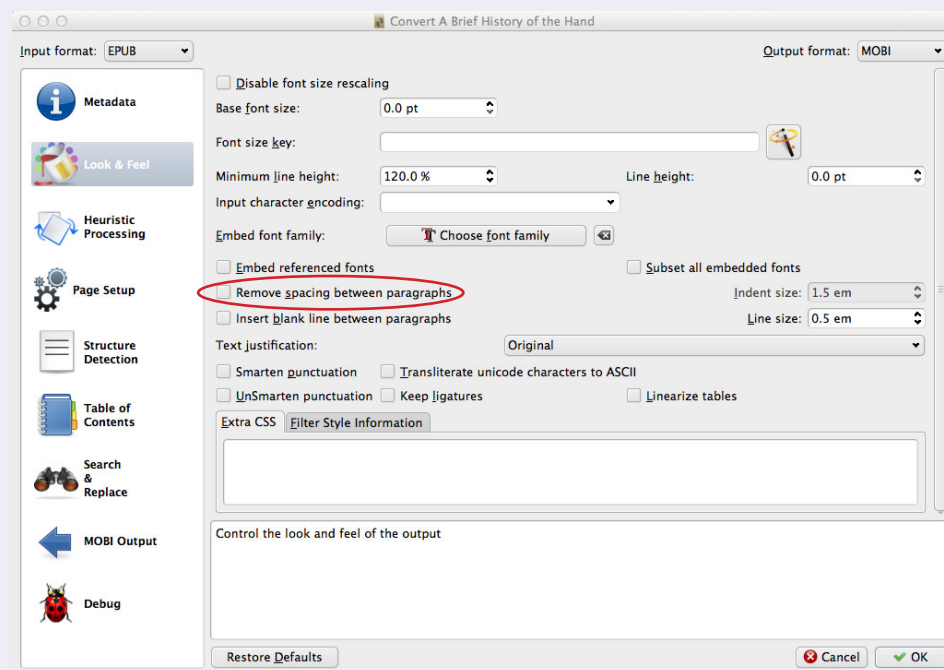
If ePub or Mobi is not already set as the output format, choose one from the drop-down menu at the top-right hand corner of the dialog box.

If your book cover image does not appear in the cover image viewer, you can manually navigate to a JPG file stored on your computer and add it, or click <Use cover from source file> to include the cover image if it was already built in your Word doc.



The next tab is <Look & Feel>. The only setting you need to adjust here is <Remove spacing between paragraphs>. Removing the spacing between paragraphs adds an indent to the beginning of each paragraph, which makes them look more like they would appear in a printed book.

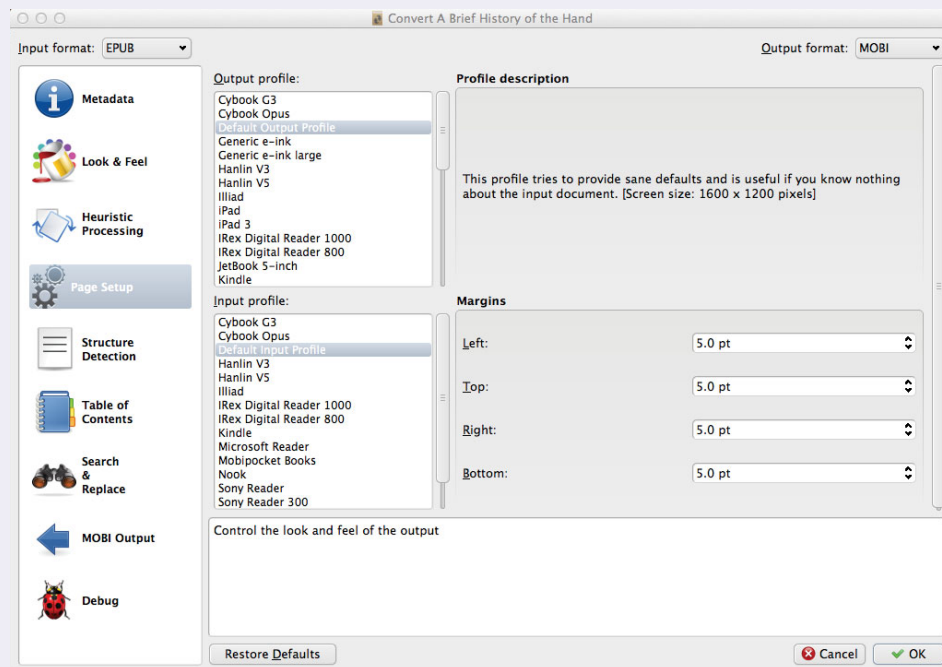
Otherwise, please do not enable <Disable font size rescaling>; the user of the device will no longer be able to enlarge the text for readability. Also be wary of embedding any font families that are not universally available on most machines and devices, as font substitutions will likely occur.



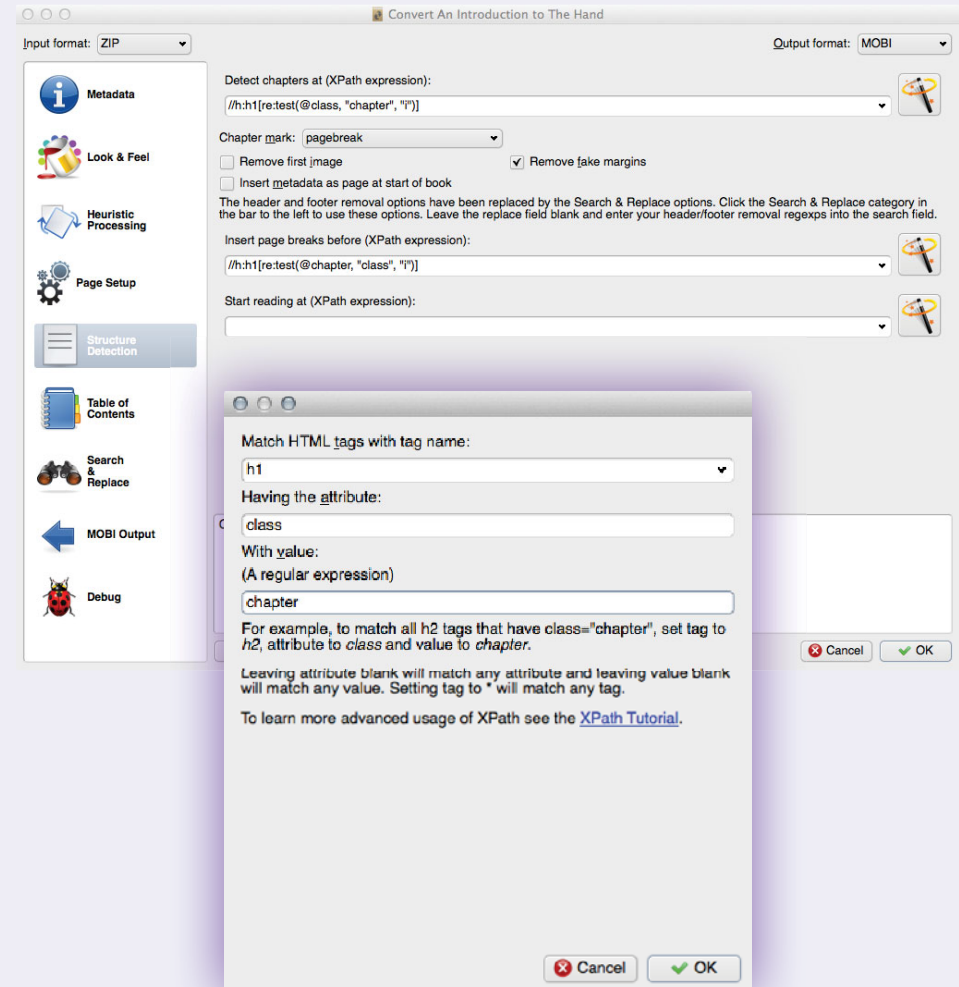
Converting to the ePub and Mobi formats with Calibre(continued)

The next tab is <Page Setup>. In the top left-hand corner of the dialog box, your Input format should automatically be recognized as <EPUB> or <MOBI>. Set your Output profile to <Default Output Profile>. Set your Input profile to <Default Input Profile>. If you are inputting and exporting a file for a personal device, and know exactly what device the conversion should be tailored to, you can specify those devices here. However, in this situation, your files will be read on unknown devices, so it's best to choose a default that covers a wider range.

Default margins should be fine as is.

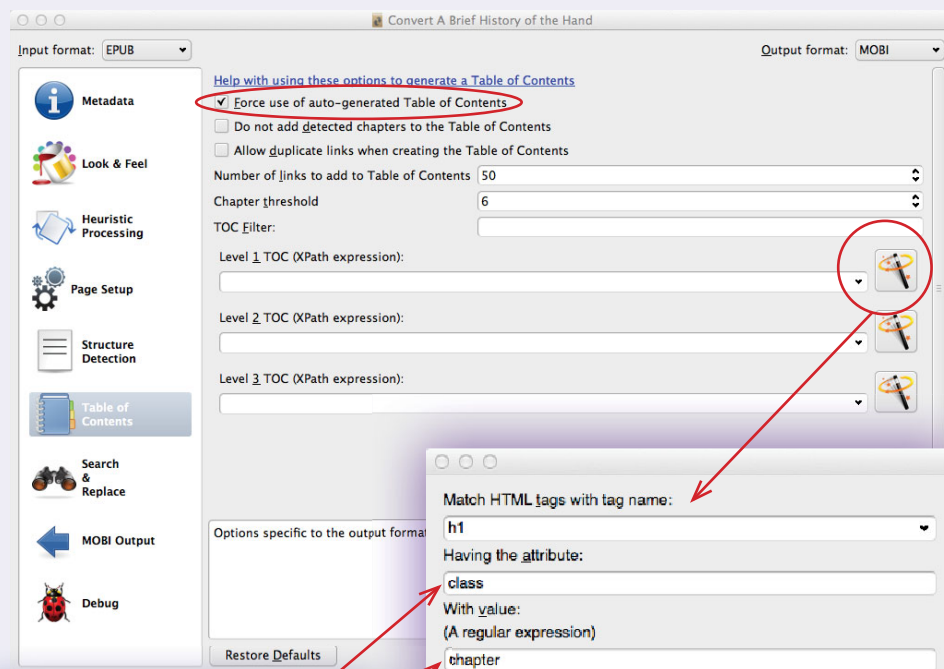


In the next tab, <Structure Detection>, use the wizard to set your chapter detection to your styled H1 headers. Select the H1 tag, then specify “class” and “chapter” attributes. Do the same for <Insert page breaks before (XPath expression)>.



Converting to the ePub and Mobi formats with Calibre(continued)

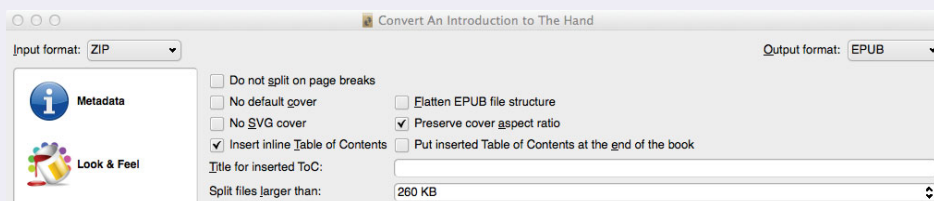
The next tab is <Table of Contents>. Click to enable <Force use of auto-generated Table of Contents>. Next, you'll need to specify the Microsoft Word styles you have previously used for chapter headings. When the HTML file was exported, these styles were tagged in a (H1, H2, etc.) hierarchy.



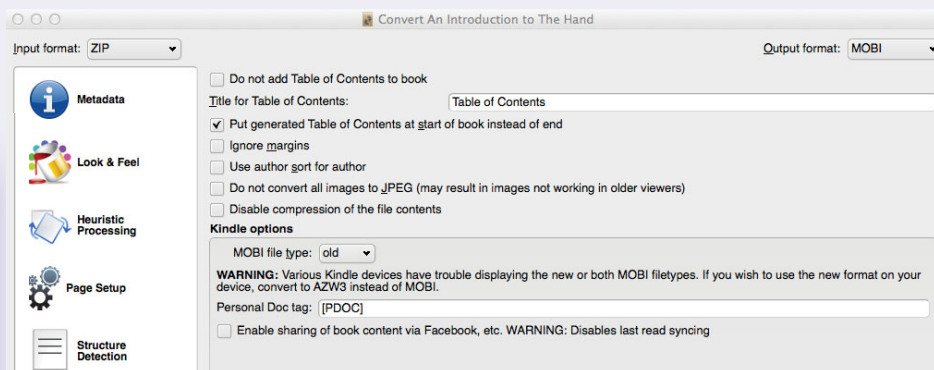
Select the correct tag, then specify "class" and "chapter" attributes.

The last tab to click is <EPub Output> or <MOBI Output>.

If you are outputting an ePub, make sure to check <Preserve cover aspect ratio> and <Insert inline Table of Contents>.



If you are outputting a Mobi, make sure to select <Old> for MOBI file type. This will make your Mobi readable by an older and larger range of Amazon Kindles.

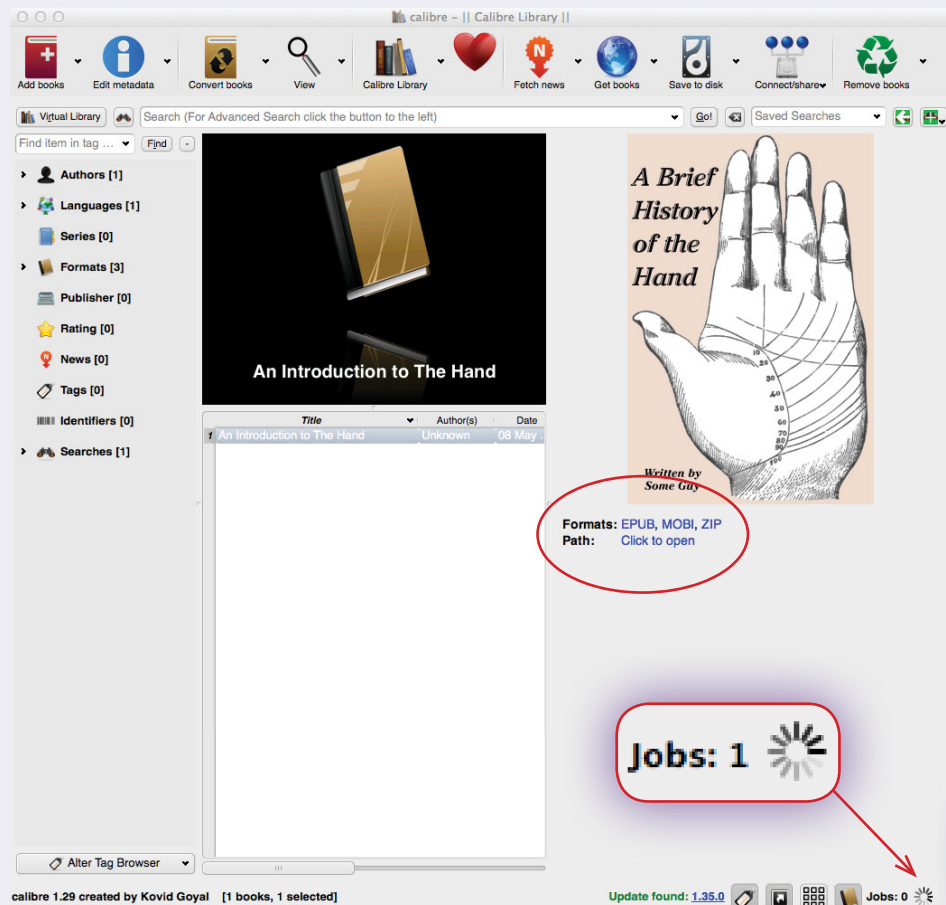


Now that you have completed adding file format specifics, click the <OK> button at the bottom right-hand corner of the dialog box. Calibre will begin to convert your file, automatically adding it to your library.

Converting to the ePub and Mobi formats with Calibre(continued)

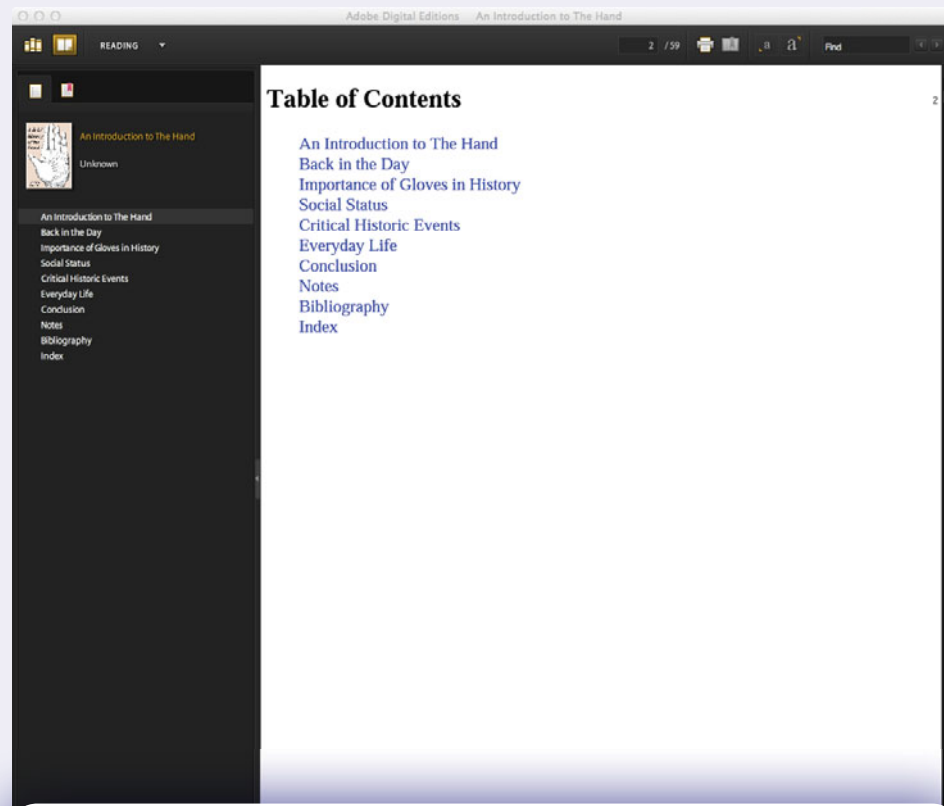
While Calibre is working, the wheel icon at the bottom-right hand corner of the library window will spin. If you click <Jobs> to the left, you can see the conversion progress of your file, or many files if you have a batch queued.

Now your new file has been added as an additional file format for your book. To view the converted file, click the <EPUB> or <MOBI> link in the file format list under the book cover image. Calibre will open a window in which you can scroll through and see what the converted file looks like.



If you open your ePub file using Adobe Digital Editions, you can check your ePub file's autogenerated Table of Contents. It will be placed directly after the front cover of the book. You can test the links both from the TOC page itself as well as the Table of Contents list off the page to the left in the application's sidebar.

Test your ePub and Mobi files on as many readers and devices as you possibly can after export to make sure it looks the way you want it to. Doing this gives you a chance to make formatting corrections before you upload your files for public consumption.



Adobe Digital Editions: a free e-book reader application
<http://www.adobe.com/products/digital-editions.html>

What do I do next?

Once you have finished producing and testing your new digital edition formats, you're ready to upload! Log into your account on site and go to the **TITLE MANAGEMENT** section of your Publisher Menu and use the **SET UP A NEW TITLE** tool.

If you have any questions or need more information about how to proceed with filling out this form, see the **WALK-THROUGH FOR ENTERING NEW BOOK TITLES** link under the **TITLE MANAGEMENT** section of your Publisher Menu.

After a successful upload, you can choose to activate your title for live sale! How exciting!

I need more help!

Your publisher service rep is not really an expert on digital layout, so chances are slim that he or she will be able to answer questions not answered in this tutorial. However, please do email us your questions anyway so we can help find an answer if we can and also so that we can improve this tutorial so it answers more questions for everyone.

You can also find people with professional skills in digital layout and contract them to create your files. The cost of this work depends on how much of the work you do yourself before handing it over for layout. We can recommend someone for layout if you would like. Please contact Publisher Service for details.

Or you can also find freelance layout professionals at sites like www.elance.com.

