The Beginner Bookbinder's Guide to Microsoft Word

Nicholas Silva

A Beginner’s Guide to Microsoft Word

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Introduction

Welcome to The Beginner Bookbinder's Guide to Microsoft Word. This guide has been prepared to help you on your journey through formatting a Word document for you to print and bind. Within these pages are useful tips and tricks, and breakdowns of how to harness some of Word's most useful tools for bookbinding.

While this guide has insight for anyone wanting to learn more about Word, it is most useful to those bookbinders who have a familiarity with their craft already but need some help navigating the oft-confusing landscape of Word to format their manuscripts. As such, this guide benefits from being used alongside an active project in which you need some printing advice.

Thank you for choosing this guide, and may it serve you well.

Note: This manual was developed using Microsoft Word for Desktop, running on a Windows machine. Not all features may be present or work as described on Mac or the online versions.

Section 1: General Formatting and Tips

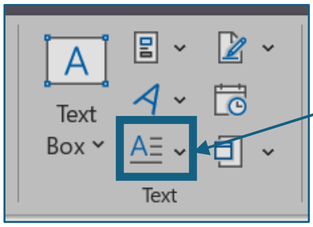
This section contains information on some generally useful tools for bookbinding, including decorative formatting such as Drop Caps and the use of Style for chapter titles, as well as some standard but tricky formatting in the form of Paragraph Indents.

Adding and Modifying a Drop Cap

A Drop Cap is the large letter at the start of a section of text. It is a decorative text element that you may choose to add some visual interest to your chapters. These can be added in multiple ways (for instance by using a custom image) but this module will explain how to use Word's inbuilt **Drop Cap** text tool.

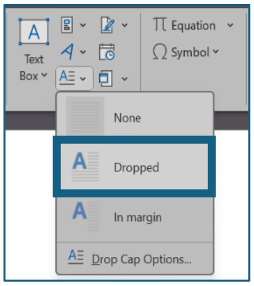
Applying a Drop Cap

1. Select the **Insert** tab on the ribbon.
2. Locate the **Text** section towards the right of the ribbon.
3. Select the letter that you want to apply the Drop Cap to (or you can simply click anywhere in the paragraph containing it)
4. Click the **Drop Cap** option.
   A menu opens.



Note: If you have not selected your text, the tool will be greyedout and unclickable, like this: A☰

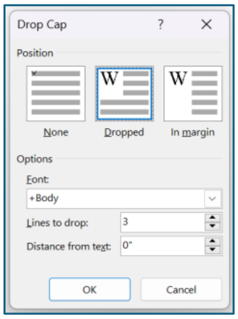
5. From the dropdown menu select **Dropped**
   The first letter of your selected text will have the Drop Cap formatting applied to it



Note: The **Dropped** default formatting will not always suit all letters equally well. Making your Drop Cap work may require adjustments to font, size, number of lines dropped, and more.

Modifying a Drop Cap

1. Select **Drop Cap Options...** at the bottom of the **Drop Cap** dropdown menu.
   A new window will open.
2. Select **Dropped** (if not already selected). Use the settings to modify the letter.



Font: +Body
Lines to drop: 3
Distance from text: 0"

Font: This dropdown will run you through all the fonts installed in your version of Word. You may find it easier to adjust this (with the drop cap selected) through the font select on the **Home** tab

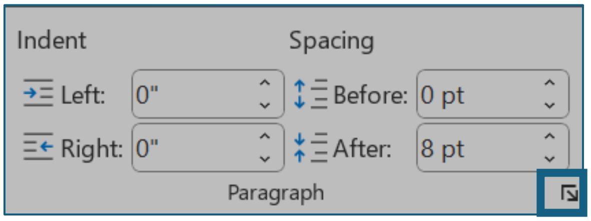
Lines to Drop: This number is important, as it modifies the size of the Drop Cap (how many lines tall the letter will be).

3. Click OK.

Formatting Paragraph Indents

When working with manuscripts that are not fully formatted, you might find yourself looking at an infinite supply of paragraphs with no first-line indent. Adjusting these by hand would be a daunting, tiresome task, but luckily Word has an easy fix!

1. Select the text you wish to apply indentation to.
2. Click the **Layout** tab on the ribbon.
3. Click the dialog box launcher in the **Paragraph** section.

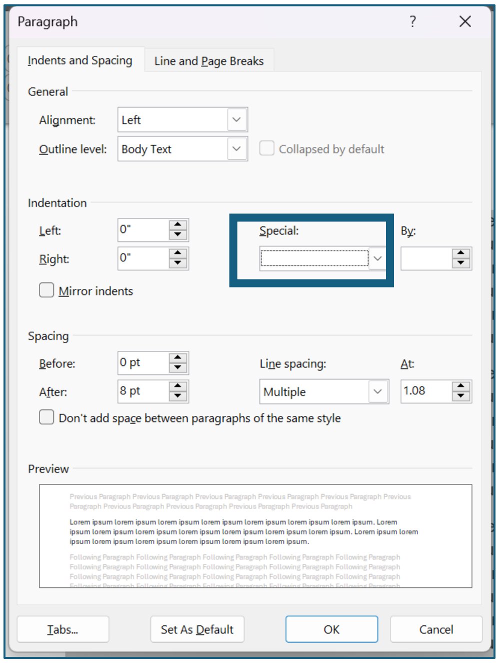

Indent
Spacing
Paragraph

Left: 0"
Right: 0"
Before: 0 pt
After: 8 pt

A drop-down menu opens.

4. Click on **Special** under **Indentation**

A drop-down menu opens.


Paragraph
?
Indents and Spacing
Line and Page Breaks
General
Indentation
Special:
By:
Mirror indents
Spacing
Don't add space between paragraphs of the same style
Collapsed by default
Preview
Tabs...
Set As Default
OK
Cancel

Alignment: Left
Outline level: Body Text
Left: 0"
Right: 0"
Before: 0 pt
After: 8 pt
Line spacing: Multiple
At: 1.08

5. Select **First Line** from the drop-down menu.

This will automatically apply a .5 indent under **By** and will be visible in the **Preview** text.

6. Click **OK**

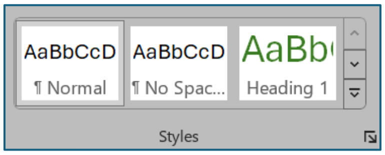
The window will close, and your changes will be applied to your selected text.

Note: By convention, most chapters start with a paragraph with no indentation, then resume indentation for subsequent paragraphs. To achieve this, select the text of each chapter (or whatever text you wish to apply formatting to) starting at the second paragraph, going one chapter at a time. This will help to ensure that the formatting applies only where you want it to.

Formatting Chapter Titles using Styles

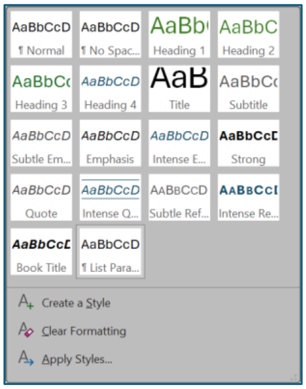
Chapter titles are a hallmark of most lengthy documents, and help the reader navigate. As such, it helps to make them stand out. This module will show you how to use styles as a basis for your chapter titles, using a common formatting practice as an example.

1. Select your chapter title.
2. Click the down arrow in the **Styles** section top open the **Styles** window (for larger screen sizes this may not be necessary).


AaBbCcD
¶ Normal
AaBbCcD
¶ No Spac...
AaBb(
Heading 1
Styles

A window opens.

3. Select the **Heading** style that best fits your need.


AaBbCcD
¶ Normal
AaBbCcD
¶ No Spac...
AaBb(
Heading 1
AaBbC
Heading 2
AaBbCc
Heading 3
AaBbCcD
Heading 4
AaB
Title
AaBbCc
Subtitle
AaBbCcD
Subtle Em...
AaBbCcD
Emphasis
AaBbCcD
Intense E...
AaBbCcD
Strong
AaBbCcD
Quote
AaBbCcD
Intense Q...
AaBbCcD
Subtle Ref...
AaBbCcI
Intense Re...
AaBbCcD
Book Title
AaBbCcD
¶ List Para...
Create a Style
Clear Formatting
Apply Styles...

Note: Headings will impact your Table of Contents and have intrinsic effects on things such as screen readers. As such, it is important to follow the numbered hierarchy. The default style isn't important; you can, and in this module will, adjust the styling.

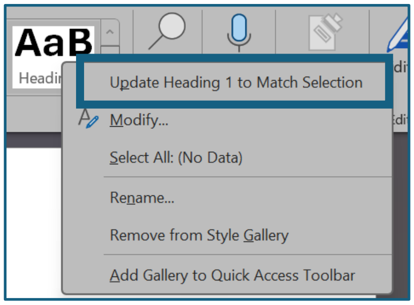
Choosing your Heading: Your document will start with a Title style. From there, which heading you use for chapters depends upon if you have other structural elements such as "Part 1". If you don't Heading 1 will suit you well. If you do, continue down the list as needed.

4. Click on **Center** alignment in the **Paragraph** section of the home tab.
   Your title centers on the page.
5. Use the standard text formatting options to adjust size, color, font, and other styling to your desired appearance.

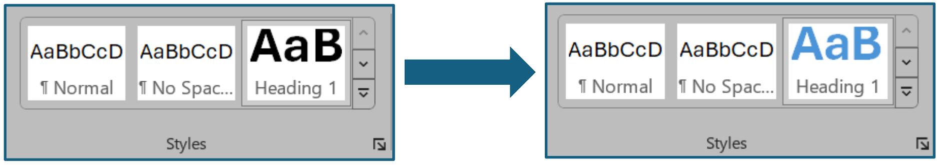
Updating Styles

If you wish to use the same style across chapters, you can update the heading style for your whole document.

1. Select your styled text.
2. Right-click on the appropriate heading style in **Styles**.
   A window opens.
3. Select **Update** (your choice of style) **to Match Selection**


AaB
Headi
Update Heading 1 to Match Selection
Modify...
Select All: (No Data)
Rename...
Remove from Style Gallery
Add Gallery to Quick Access Toolbar

The style will visually change in the **Styles** preview to match your selection.
For example:


AaBbCcD
¶ Normal
AaBbCcD
¶ No Spac...
AaB
Heading 1
Styles
AaBbCcD
¶ Normal
AaBbCcD
¶ No Spac...
AaB
Heading 1
Styles

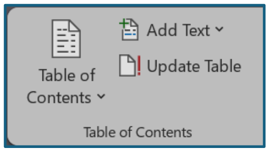
This style will now be ready to be applied across your document.

Working with the Table of Contents

A table of contents is a very useful tool for your reader to navigate your document. If you have set up chapter titles using Word's **Style** option already, this module will show you how to easily add a table of contents (if you need to add chapter titles using **Styles**, see the previous module).

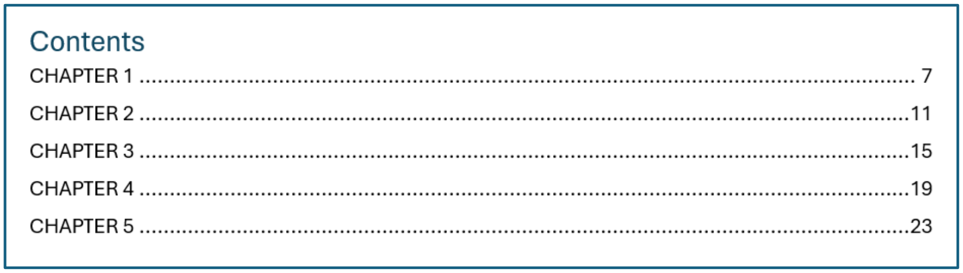
Adding a Table of Contents

1. Select a page where you want your Table of Contents to appear.
2. Open the **References** tab on the Ribbon.
3. Click on **Table of Contents.**



A drop-down menu opens.

4. Select your desired style. For this example, **Automatic Table 1**.
   A table of contents is added to your page, and auto-populates with your chapter titles and page numbers.

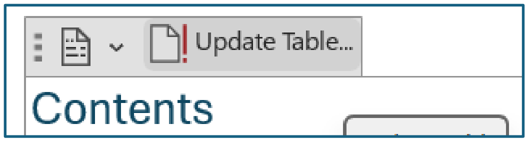


Contents

CHAPTER 1 7
CHAPTER 2 11
CHAPTER 3 15
CHAPTER 4 19
CHAPTER 5 23

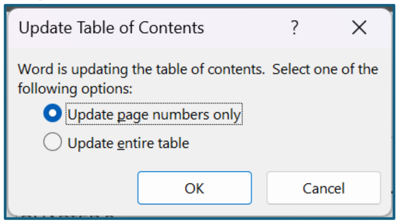
Updating your Table of Contents

1. Click inside your table of contents
   An outline appears around the table of contents, and a box appears at the top.
2. Select **Update Table**.



A window opens.

3. Choose whether to **Update page numbers only** (if you have added pages and shifted the page numbers) or **Update entire table** (for instance, if you have added a chapter).



Update Table of Contents

Word is updating the table of contents. Select one of the following options:

● Update page numbers only
○ Update entire table

Your table updates.

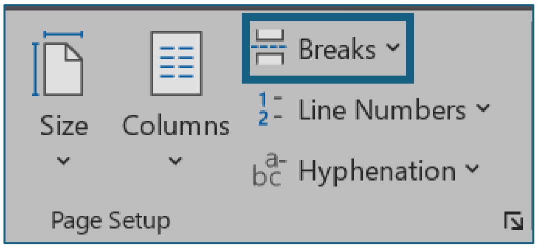
Section 2: Layout

This section will get into a variety of valuable tools which can help you hone the layout of your manuscript, including the invaluable Section Breaks, bringing your document away from the default Word doc appearance and closer to a finished ready-to-print book.

Adding Section Breaks

Section Breaks is a useful tool which unlocks a variety of formatting options covered in other modules (such as chapter title formatting for the running header, and more advanced page numbers). Section Breaks work by adding a formatting division within the document which these settings can interact with. This module will focus on adding section breaks for chapters.

1. Navigate to the page you wish to start a section on (such as the first page of a chapter)
2. Click at the end of the text on the previous page. (Note: It is important that your cursor is at the end of the text, or else some of your text may be moved to the next page. You may always **Undo** if you miss-click).
3. Open the **Layout** tab in the ribbon.
4. Click on **Breaks.**



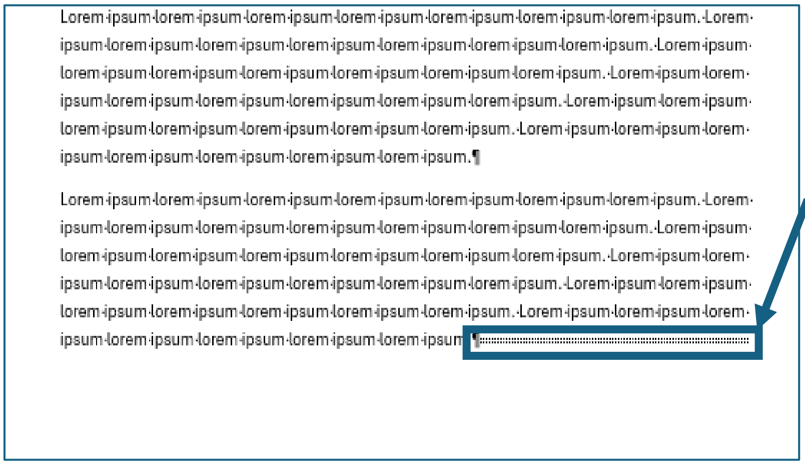
A drop-down menu opens.

Continuous: Continuous breaks apply section breaks to the same page. This is useful for applying different formatting to the same page.

Next Page: The most applicable for bookbinding, the **Next Page** option applies a section break to the next page. It is useful for marking the start of a new chapter.

5. Select **Next Page** from the menu.

A **Section Break** is added at the end of the page. A new section begins on the next page.



Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum. Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum. Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum. Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum. Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum. Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum.¶

Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum. Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum. Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum. Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum. Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum. Lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum lorem ipsum¶

You can enable formatting marks by clicking on the pilcrow (¶ in the paragraph section of **HOME**). Doing so will show a mark like this (two rows of dots) where the section break begins.

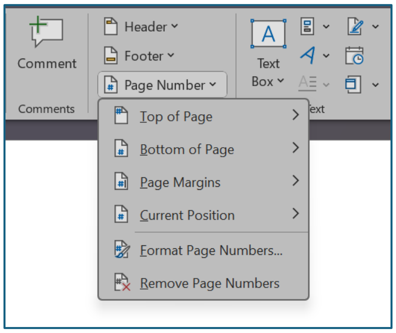
Note: If any of your text gets moved around when adding the Section Break (for example, the text on the next page often gets moved down one line)

Additional: To encapsulate a chapter, add another section break at the end of the chapter's contents.

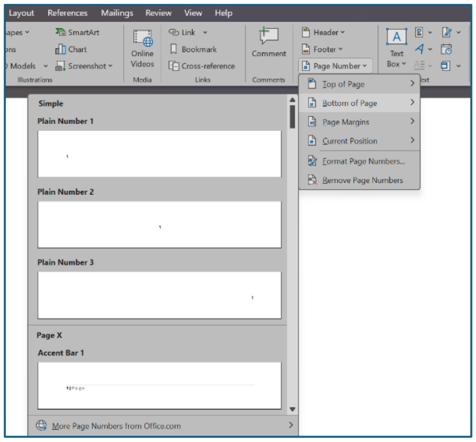
Using Page Numbers

Page numbers are an essential part of navigating a book, and you have many options when it comes to formatting them. This module will document how to add page numbers to headers and footers.

1. Select the **Insert** tab at the top of the ribbon.
2. Locate the **Header & Footer** section, towards the right of the ribbon.
3. Select the **Page Number** drop-down menu.
   A new menu opens with a variety of options of locations to place page numbers, as well as options to format and remove them.


Comment
Comments
Header
Footer
Page Number
Text Box
ext
Top of Page
Bottom of Page
Page Margins
Current Position
Format Page Numbers...
Remove Page Numbers

4. Hover over **Top of Page** or **Bottom of Page**, depending upon whether you wish for a page number in the header or the footer.
   A new menu opens with **Sample** page number arrangements.


Layout
References
Mailings
Review
View
Help
apes
SmartArt
ons
Chart
Models
Screenshot
Illustrations
Online Videos
Media
Link
Bookmark
Cross-reference
Links
Comment
Comments
Header
Footer
Page Number
Text Box
ext
Top of Page
Bottom of Page
Page Margins
Current Position
Format Page Numbers...
Remove Page Numbers
Simple
Plain Number 1
1
Plain Number 2
1
Plain Number 3
1
Page X
Accent Bar 1
1|Page
More Page Numbers from Office.com

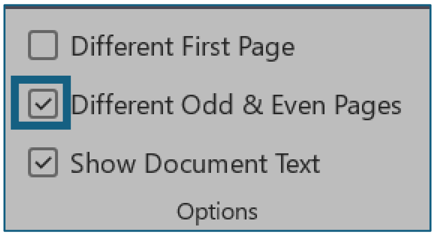
5. Select your desired format from the options provided, noting that there are more options if you scroll down.
   Your selected page number format is applied automatically to your document.

Modifying Page Numbers for Different Pages

Often you will find yourself wanting to change the preset page number layouts, especially to allow for flexibility between different pages. This module will walk you through applying different page numbers on odd and even pages, and on the first page.

Different Odd and Even Page Numbers

1. Double-click to enter the header or footer.
   The ribbon opens the **Header and Footer** tab.
2. Click on **Different Odd & Even Pages.**
   The box next to the option will update to show a check mark.



☐ Different First Page
☑ Different Odd & Even Pages
☑ Show Document Text

3. Click on an odd-numbered page.
4. Select the format that you wish to have on this page (for instance, a page number in the top right corner).
   This will update all odd pages within your selected section.
5. Repeat steps 3 and 4 for an even-numbered page.

Different First Page

First pages (typically, of chapters) will often have different formatting. To adjust the formatting for a first page:

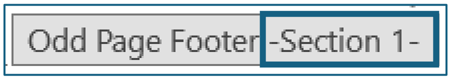
1. Double-click to enter the header or footer.
   The ribbon opens the **Header and Footer** tab.
2. Click on **Different First Page**
   The box next to the option will update to show a check mark.
3. Apply your desired formatting to the first page of your selected section (such as no page number).
   The first page will now display a different formatting than the other pages.

Note: For more detail on how to apply different page numbers to different sections of your manuscript (such as roman numerals for an index, or a spread of unnumbered pages for front material), see the Chapter 3's "Adding Section Breaks". Apply these above principles within these sections to achieve your desired result.

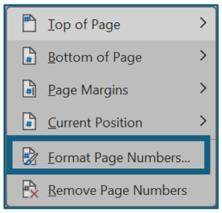
Switching Page Number Styles

Depending upon the contents of your manuscript, you may wish to add a section which breaks from the main text, such as front matter or an appendix. By convention, these sections will often have different page number styling. This module will present you with the option to add Roman Numerals to a section of your document.

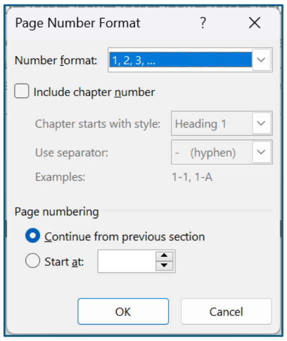
1. Create a section containing the pages that will have different page number styling (see Module “Adding Section Breaks”).
2. Double click over one of your page numbers in your new section.
   A box identifying which section you are in now appears above the footer.


Odd Page Footer -Section 1-

3. Click on **Page Number** in the **Header and Footer** Tab.


Top of Page
Bottom of Page
Page Margins
Current Position
Format Page Numbers...
Remove Page Numbers

4. Click on **Format Page Numbers.**
   A new window opens.
5. Click on the **Number format** drop-down menu.


Page Number Format
?
×

Number format: 1, 2, 3, ...

☐ Include chapter number

Chapter starts with style: Heading 1

Use separator: - (hyphen)

Examples: 1-1, 1-A

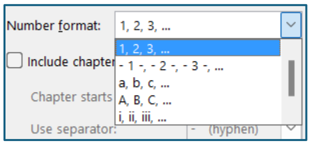
Page numbering

● Continue from previous section

○ Start at:

OK
Cancel

6. Select the Roman Numerals (**i, ii, iii…**).


Number format: 1, 2, 3, ...

1, 2, 3, ...
- 1 -, - 2 -, - 3 -, ...
a, b, c, ...
A, B, C, ...
i, ii, iii, ...
Include chapter
Chapter starts
Use separator:
- (hyphen)

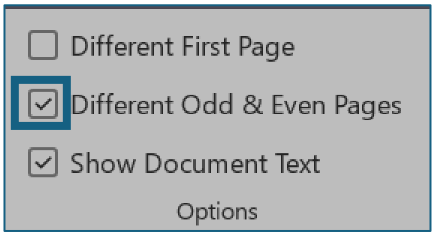
7. Locate the page where your second section starts.
8. Repeat steps 5-7.
9. Select the Arabic Numerals (**1, 2, 3…**) from the menu.
10. Click on **Start At** and type “1” into the box beside it.
11. Click **OK.**
    Your page numbers will now switch from Roman Numerals to Arabic Numerals starting at 1 at your section break.

Note: This is useful for formatting appendixes, forewords, or other content that you don’t want numbered the same as the rest of your document.

Adding A Running Header

Including the title of the current chapter, the title of your work, and/or the author’s name in the header can be useful points of navigation and reference for your reader. This is known as a running header. Here you will learn how to insert them into your document.

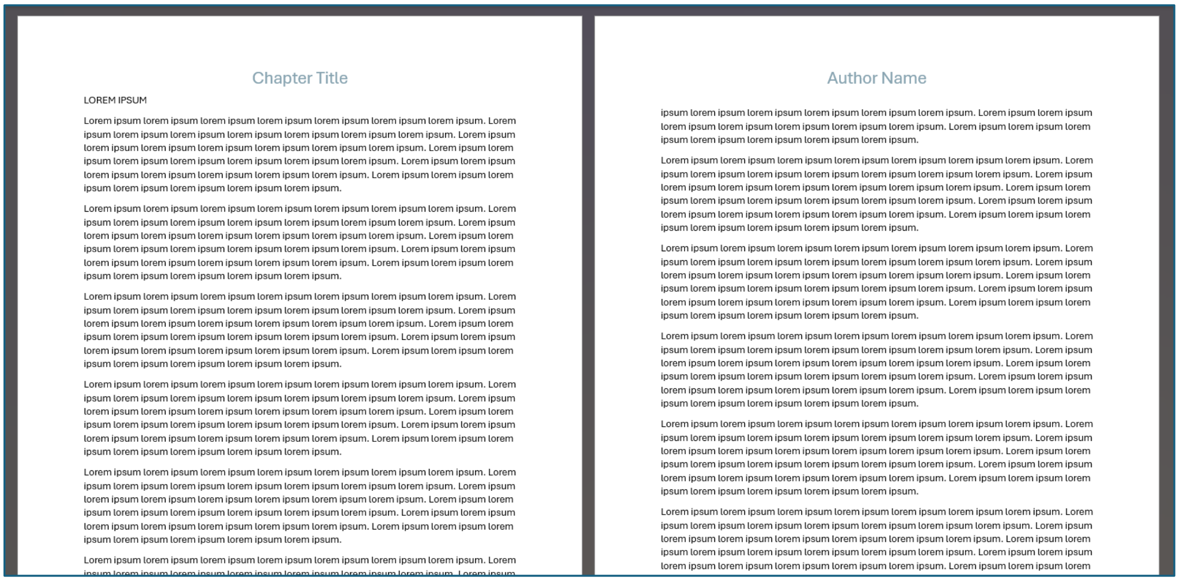
1. Double-click to enter the header.
   The ribbon opens the **Header and Footer** tab.
2. Click on **Different Odd & Even Pages.**
   The box next to the option will update to show a check mark.



☐ Different First Page
☑ Different Odd & Even Pages
☑ Show Document Text
Options

Note: Different Odd and Even pages will allow you to alternate the information presented on the left and right pages, as is convention for most book formatting.

3. Navigate to the header of an odd page.
4. Type in the information you want to appear (commonly a chapter or book title).
   Your text populates all odd pages currently linked to this page (using “Link to Previous” when setting up your sections).
5. Navigate to the header of an odd page.
6. Type in the information you want to appear (commonly the author’s name).
   Your text populates to all even pages currently linked to this page.
7. Apply your desired formatting to the header text by selecting it (for instance, center aligning)

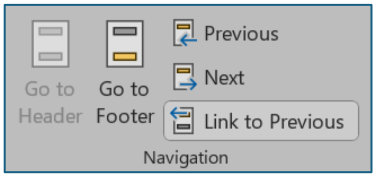


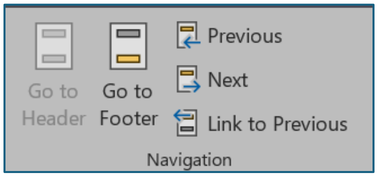
Note: You may wish to use **Multiple Pages** view in order to see how your changes are flowing from page to page.

Changing Chapter Titles per Chapter (Headers)

For books with multiple sections, chapters, or perhaps even stories within them it can be useful to alternate the headers to reflect this information for the reader. This module will inform you as to how this might be achieved.

1. Add a section break before and after your chapter text, for each chapter (see "Adding Section Breaks").
   Your chapter will now be contained in its own section.
2. Double click on the **Header** to enter it.
3. Click **Link to Previous** in the **Header & Footer** tab.





If the **Link to Previous** button is *not* highlighted (bottom image), then it is unlinked. *This is what you want*. This may happen by default; you just want to make sure. Unlinking the sections *before* changing the heading content ensures you are only modifying the header for your active section. For material such as the Author Name on the right-hand pages, you can leave **Link to Previous** checked as it stays the same throughout the book.

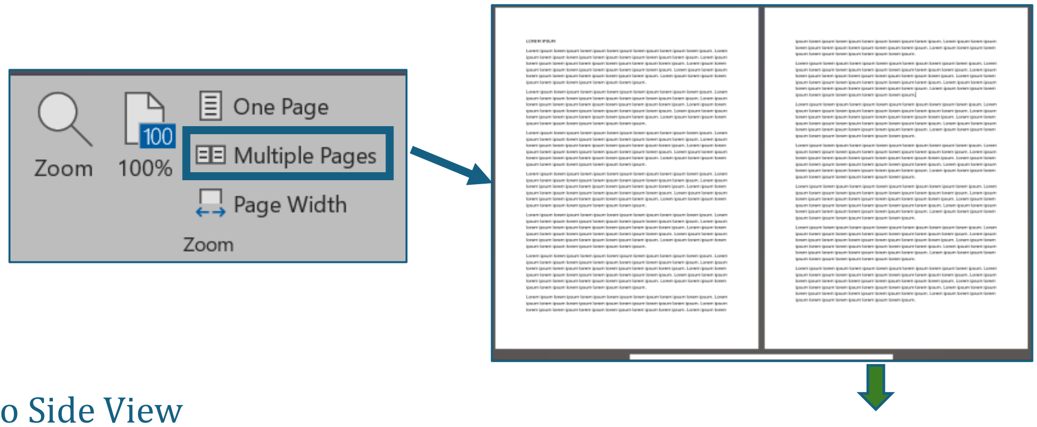
4. Go to the start of the next section.
5. Repeat steps 2-7 for each chapter.
6. Go to the first left-hand page of your new section.
7. Double click on the **Header** to enter it.
8. Type in the information you wish to appear on the left side for this section of your manuscript.
   The new text populates all odd pages currently linked to this page.

Viewing Your Pages Side-by-Side

It can be exceptionally helpful to see your pages side-by-side, especially when applying formatting to headers and footers (see the next chapter).

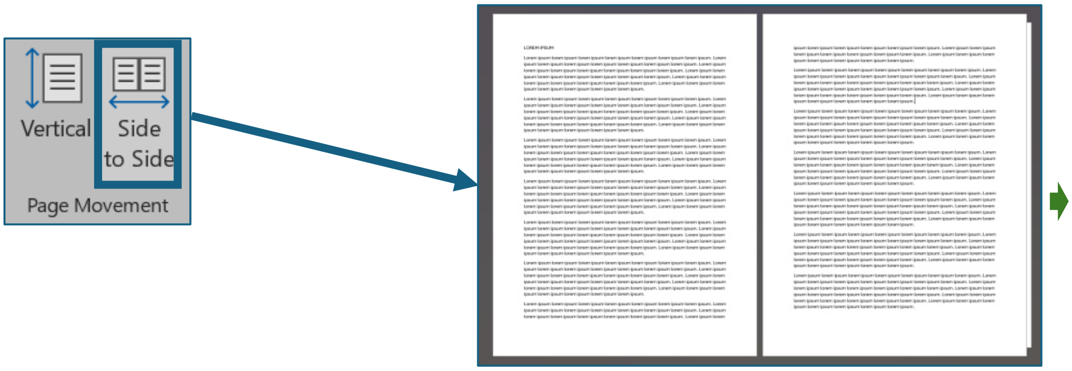
Multiple Pages View

1. Select the **View** tab on the ribbon.
2. Locate the **Zoom** section in the middle of the ribbon.
3. Select **Multiple Pages.**
   Your screen zooms out and shows two pages side by side. You can scroll down to see the rest of the manuscript.



Side to Side View

1. Select the **View** tab on the ribbon.
2. Locate the **Page Movement** section towards the left of the ribbon.
3. Select **Side to Side.**
   Your screen will now display two pages side by side, with more pages displayed as if in a book to the left and right, which you can then "flip" between.



Note: While the **Side to Side** view can be useful for "flipping through" your manuscript, or getting a general view of it, when it comes to formatting, **Multiple Pages** is often a much more informative view as it will give you a better sense of how the document will be laid out overall (and how the pages might interact and flow once printed).

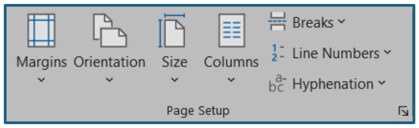
Section 3: Getting Ready to Print

This section will walk you through some tools which will help you with final page formatting to help you get ready to print your manuscript, including notes on how to save your document for easy printing in the future and how to account for physical printing constraints.

Formatting Page Size

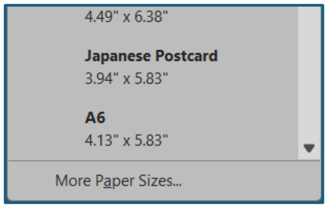
When printing your document to be bound, another physical consideration beyond signatures is that of the size of the page you are printing to. While printing your document in booklet format as it is will often work, adjusting the size of the pages within your document will allow you greater control over how the finished product will look in person.

1. Open the **Layout** tab on the ribbon.
2. Click on **Size**.


Margins
Orientation
Size
Columns
Breaks
Line Numbers
Hyphenation
Page Setup

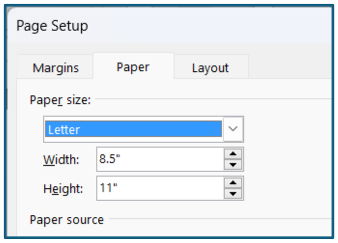
   A drop-down menu opens.

3. Click on **More Paper Sizes** at the bottom of the menu.


4.49" x 6.38"
Japanese Postcard
3.94" x 5.83"
A6
4.13" x 5.83"
More Paper Sizes...

   A new window opens.

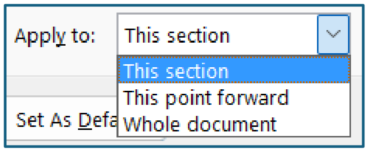
4. Type your desired page **Width** and **Length** into the appropriate text boxes.


Page Setup
Margins
Paper
Layout
Paper source

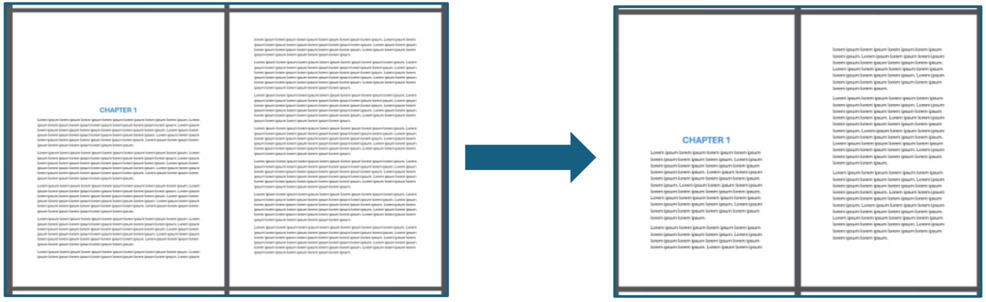
Paper size: Letter
Width: 8.5"
Height: 11"

Note: The page size that you are accounting for, if printing for signatures, is often half of a piece of the paper you will be using, folded length-wise (hamburger-style, if you will). Usually this will be 5.5 by 8.5 inches.

5. Click **Apply To** at the bottom of the menu.
   A drop-down menu opens.
6. Select **Apply to Whole Document**.


Apply to:
This section
This section
This point forward
Whole document
Set As Defa

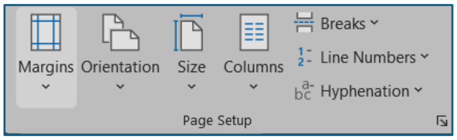
7. Click **OK**.
   The window closes. Your document will shift around, and will be visually distinct from it's prior format. You may need to **Update** your Table of Contents if you have one.


CHAPTER 1
CHAPTER 1

Adjusting Margins

Margins are a valuable tool in controlling the appearance of your pages when printed, especially when printed in signatures. This module will show how you can adjust the margins of your document to achieve the look you're going for.

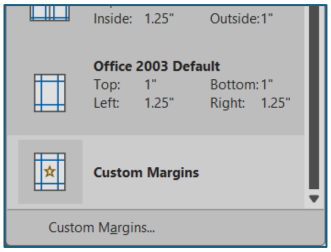
1. Open the **Layout** tab of the ribbon.
2. Click on the **Margins** button.


Margins
Orientation
Size
Columns
Breaks
Line Numbers
Hyphenation
Page Setup

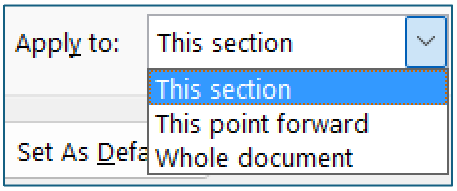
A drop-down menu opens.

3. Click on **Custom Margins**.

A new window opens.


Inside: 1.25"
Outside: 1"
Office 2003 Default
Top: 1"
Bottom: 1"
Left: 1.25"
Right: 1.25"
Custom Margins
Custom Margins...

4. Adjust your **Margins** as you wish. Margins may be adjusted for each side individually as needed.
5. Choose where to apply your margins (usually **Whole document** unless you're specifically modifying one section).


Apply to:
This section
This section
This point forward
Whole document
Set As Defa

6. Click **OK** to apply your margin selection.

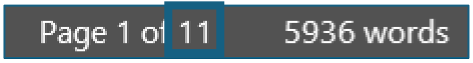
Your margins will immediately resize.

Adjusting your margins can be a powerful tool towards achieving the look you're going for. However, it is important to think about balancing physical needs when binding (ensuring enough space for the gutter, where your binding will go, and enough blank space to protect the text when trimming the text block) and your visual tastes on the page.

Adding Padding (Blank Pages)

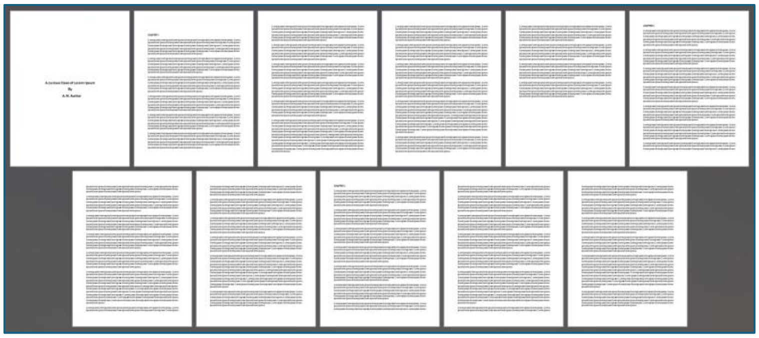
Padding is what the blank pages found at the front and the back of a book are called, and they are an important tool in constructing your layout. These pages allow you a great deal of control over how your book will appear on the page and are important when it comes to binding signatures.

1. Identify the number of pages in your document (using the **Page** count in the bottom left of your window).



Page 1 of 11 5936 words

For example, here is what this 11-page document looks like laid out:



It is important that your document is a multiple of your desired signature length, in this case 16.

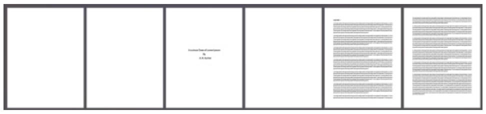
Printing an odd-numbered group of pages, like this 11 page document, would result in an unruly, and perhaps unsuccessful, signature.

Adding Pages to the Front Matter

2. Navigate to the front of your document.
3. Open the **Insert** tab of the ribbon
4. Click **Blank Page** in the **Pages** section.
   A blank page is added.
5. Repeat until you have your desired number of blank pages.

Adding blank pages allows you to control how your pages will be laid out when printed. Consider how you want your pages to flow. For instance, most books start with a blank page. To add a completely blank page, on both sides, you would add two back-to-back blank pages.

For a title page, for instance, the back of the page is usually blank. For that, you would add a blank page after the title page.



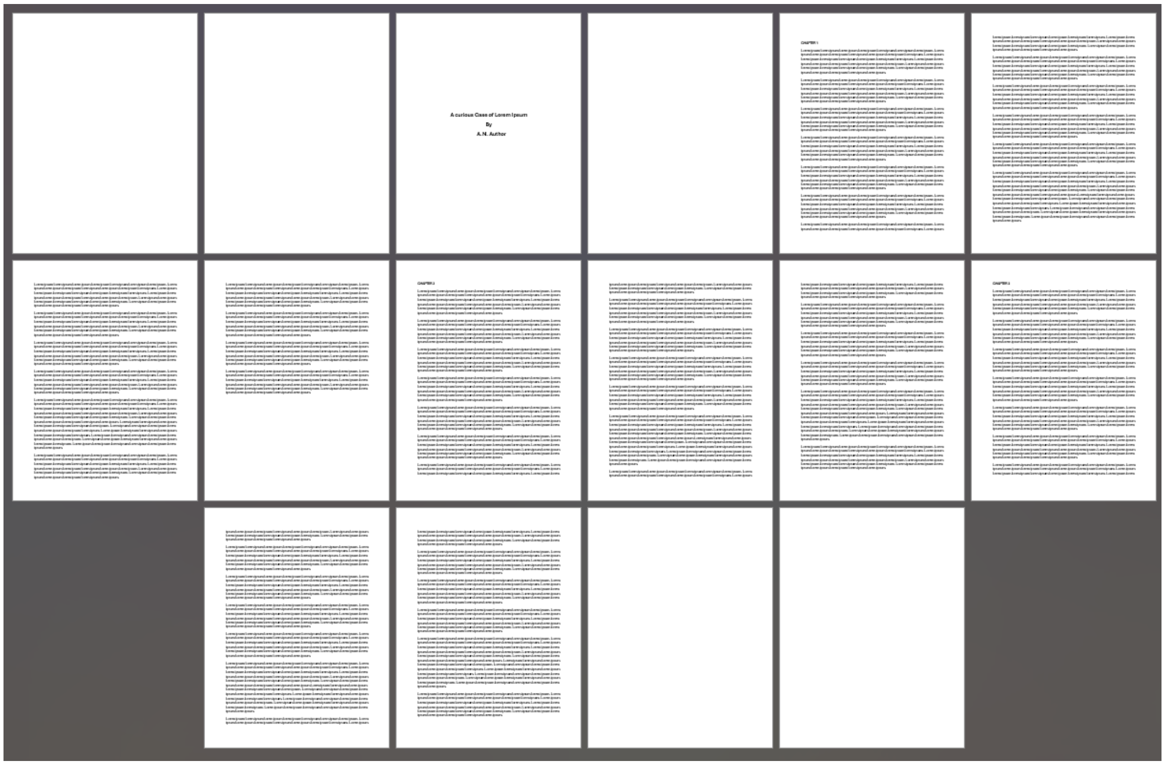
This layout would provide three pages. One blank, a title page, and then a two-sided page of text.

Adding Pages to the Back of your Manuscript

6. Navigate to the back of your document.
7. Add blank pages until your document reaches a multiple of your signature count.

> It is important to wait to do this step until the rest of your layout is complete so that you know how many extra pages are needed. If you want, you could also add additional blank pages at the start.
>
> If formatting for perfect binding, or another format that doesn't need signatures, you can feel free to add however few or many blank pages at the back as you desire.

Here is what the example document looks like with padding added:

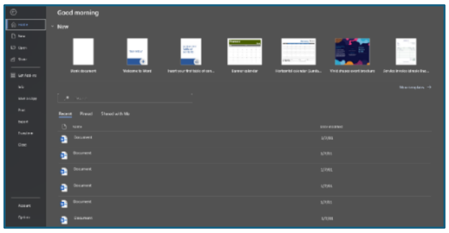


A curious Case of Lorem Ipsum
By
A.N. Author

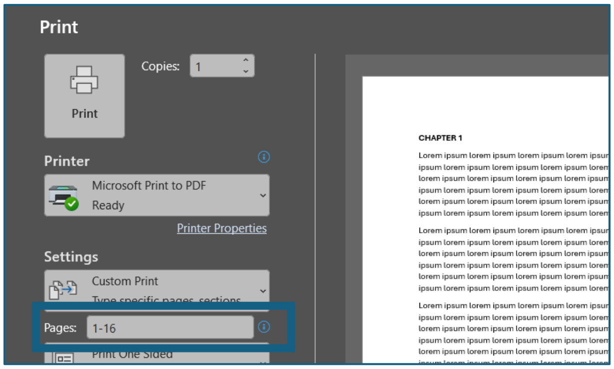
Exporting/Printing to PDFs in Parts (Signatures)

If you choose to print out your formatted manuscript with the intention of binding it, you will have to consider the physical constraints of signatures (the groups of pages which are bound together in many binding methods). This module will show you how to print your manuscript in signature-friendly chunks.

1. Open your document
2. Click on the **File** tab in the ribbon.
   Microsoft Office Backstage View opens.



3. Click on the **Print** button on the sidebar.
   The Print view opens.
4. Click into the **Pages** text box under **Settings**.
5. Type your desired page signature length (for example, pages 1-16).

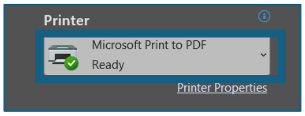


Copies: 1

Microsoft Print to PDF
Ready

Pages: 1-16

6. Select **Microsoft Print to PDF** from the **Printer** drop-down menu (it may already be selected by default).



Microsoft Print to PDF
Ready

7. Click the **Print** button.
   A new window opens to save your file.
8. Save your file as a **PDF**.
9. Repeat until all pages have been saved in sections.

Note: For ease of access, you may want to create a folder directory specifically to house your sections, and name them in order (Manuscript Title, Section #). Additionally, while you can follow these steps and print immediately instead of saving to files, saving to individual files allows you greater control over the process. For example, if you select the wrong pages, you can simply resave the file instead of having to reprint. Having the files saved also makes it easier to print more copies later!

Acknowledgments

This manual was created for the Fall 2024 session of English 380 of the Professional Writing and Technical Communications Certificate at the University of Massachusetts Amherst.

Special thanks to the course's instructor, Professor Solberg, whose dedication and insight made this course and this manual possible. Her thoughtful suggestions helped hone it from a rough draft to the slightly-less-rough final copy you see before you.

Additional thanks to my classmates, whose help in workshops was immensely valuable, and to my friends who volunteered to read and test the manual during its development.

A Note on Development

This manual was developed over the course of the Fall 2024 session in three principal chunks of modules, based upon the principles taught in class. These chunks, roughly five modules each, were put through a workshop and feedback process with the help of classmates, friends, and Professor Solberg.

The physical copy of this manual was hand-bound by me using the stab binding technique. While I typically favor the Coptic stitch binding, this project's needs called for a new approach, and so after research on YouTube (with special thanks to the channel *bitter melon bindery*), I arrived at this technique. Stab binding allows for the binding of single sheets, which was exactly what this manual called for.

All screenshots were captured by me on Windows devices running Windows 11, using the latest build of Microsoft Word for desktop.