

The two major e-book formats are .azw/.mobi (Amazon Kindle) and .epub (Apple iPad, Barnes & Noble Nook, Sony Reader, every reader except the Kindle). If your book is laid out in InDesign, you can use InDesign's "Export for Digital Editions" function to create an .epub file, then convert the .epub file to a .mobi file. These instructions are for InDesign CS4 on a Windows PC.

### ***Step 1: Prepare the InDesign file for export.***

1. Reduce the number of paragraph and character styles.
2. Deselect the ligatures option in the remaining styles.
3. Replace any dingbats or special characters that aren't found in most fonts with graphics, or delete them.
4. Set up a Table of Contents style (Layout > Table of Contents...), if your document doesn't already include one. This style tells InDesign which styles are headings, and their hierarchy. Your page titles (Acknowledgments, Introduction, etc.) and chapter titles should be styled as headings.
5. Separate all sections that should start on a new page into separate InDesign files. For example, one file each for title page, copyright page, table of contents, map, each part opening, each chapter, and any other sections of your book.
6. Also create an InDesign file for your front cover. Make it the same size as the bookblock pages; no bleed needed.
7. Combine the cover and all the bookblock files into one master file using the InDesign "Book" function (File > New > Book). Adobe calls this master file a Book; the file extension is .indb. You won't see any actual files unless you double-click the file name in the Book window. Sort the Book files by dragging them into the order where they should appear in the e-book.
8. One of the files, the one with the left-hand graphic next to its name in the list, will be the base file when you synchronize styles. Double-click its file name to open it. Now edit the File Properties (File > File Info...). There will be several tabs, Description, IPTC, Camera Data, etc. You're only concerned with the first tab, Description. The information you enter becomes the metadata for your e-book. Fill out the Description tab and click "OK."
9. Save the Book file.

### ***Step 2: Export the InDesign file.***

1. On the flyout menu on the Book window, select "Export Book for Digital Editions..."
2. Type in the file name and place where file should be saved, then save as an ePub.
3. The Digital Editions Export Options window opens.  
In the General section under "eBook," select "Include Document Metadata" and add your publisher name.  
For "Base for CSS Styles," select "Defined Styles" to style your e-book similarly to your

printed book. For no styles, select “Local Formatting.” Selecting “Style Names Only” will give you a CSS style sheet that has *only* the style names. You’ll have to build the styles from scratch. I recommend “Defined Styles.”

For “Bullets and Numbers,” select “Map to Unordered Lists” and “Map to Ordered Lists” to make your life a little easier by using standard formatting.

Do NOT select “Include Embeddable Fonts.” Only certain types of fonts can be embedded, embedding the fonts will cause your file to fail validation, and most e-book readers can’t use embedded fonts.

4. Still in the Digital Editions Export Options window, go to the Images section. For “Copy Images,” select “Optimized.” If you’ve applied any borders, shadows, etc., select “Formatted.” For “Image Conversion,” select “Automatic.” For “GIF Options,” I recommend “Adaptive (no dither)” and leaving the “Interlace” checkbox unchecked. For “JPEG Options,” I recommend “Image Quality: High” and “Format Method: Baseline.”
5. The Digital Editions Export Options window, Contents section. For “Format for EPUB Content,” select “XHTML.” Under “Table of Contents,” select “Include InDesign TOC entries” and “Suppress Automatic Entries for Documents” (otherwise your file names show up in the TOC). For the TOC Style, use the style name you used when you set up your Table of Contents Style in the Book.
6. Export! You’re now done with InDesign.

### ***Step 3: Clean Up the .epub File.***

1. Rename the .epub file as a .zip file (ebook.epub > ebook.zip). Right-click the file, then click “Extract All...”
2. Ignore the META-INF folder and the mimetype file. Open the OEBPS folder. There should be at least four files:
  - a. template.css (the style sheet)
  - b. content.opf (holds the metadata, sets the reading order, defines the files included in e-book)
  - c. toc.ncx (navigation menu)
  - d. \*.xhtml (the actual book files; there should be one for each file in the InDesign Book)
3. In a text editor (NOT your word processor, but a program like NoteTab or Notepad++ or TextPad), open content.opf. Find “<dc:date/>” and change it to “<dc:date>2010</dc:date>” using the date of publication or another appropriate date. If you want to add the month, the format would be 2010-09 (year and month). If you want to change any of your metadata—the description of your book, for instance—you would edit this file. If you have no other changes, save this file and close it.

4. You will now need to edit the \*.xhtml files. If you've ever edited a Web page using a text editor, you'll have no difficulty.  
There will be probably be extra divs and spans and other unnecessary code that should be removed. You should find your headings and change the code for them from <p> to <h1> or <h2> or <h3>. If there are <span> tags with styles to indicate bold or italic formatting, the <span> tags should be replaced with <b> and <i> tags. If you're not familiar with coding, you can just leave them.  
If there are any special characters, like the trademark symbol or the em dash or the ampersand, you will need to replace each one with the correct character entity (&trade; or &mdash; or &amp;).  
This is the time to make any final changes to text or style. After you make your changes, save and close.
5. You can edit the images that had been created by InDesign, too. If you don't like the way they look after InDesign converted them, you can redo the images and save them over the InDesign images. Use .gifs or .jpgs. (Screen sizes, in pixels: iPad, 768×1024; Kindle DX, 744×1022; Sony DE, 600×1024; Sony Touch, 600×800; Sony Pocket, 600×800; B&N Nook, 600×800; Kindle I, 524×640; Kindle II, 520×622). Each image must be less than 64kb to display on the Kindle.
6. Open the template.css file, also in the text editor. I recommend completely removing the @font-face {...} section at the very beginning, then deleting any font-family references. Streamline the styles, as necessary, to what the e-readers can handle. Kindles, for example, will accept top and left margins but not right or bottom margins. If there needs to be spacing between two paragraphs, apply the spacing to the second paragraph. Make your changes, save, and close.

#### ***Step 4: Validate the .css, .xhtml, and .epub Files.***

1. An error in any one of the files, like an unclosed or mistyped tag, can cause your e-book to be unreadable. Validate your .css and .xhtml files at <http://validator.w3.org/unicorn/>. You can upload the files or paste them into a text box. If any of the files fails validation, fix the problem and test the file again.
2. After the .css and .xhtml files pass validation, it's time to reassemble the .epub file. To reassemble, right-click the .zip archive of your e-book. Click "Explore" on the pop-up menu. Click the OEBPS folder to display the .css and .xhtml files, then drag your edited files into the .zip archive window. (NOTE: Do not replace the mimetype file. If it becomes compressed your e-book will be unreadable.) Close the .zip archive.
3. Rename the .zip file to .epub. Validate it by uploading it to <http://www.threepress.org/document/epub-validate/>. If you've been very, very careful, your file should validate. If it doesn't, stop. Leave the browser window open. Take a coffee break, or brew some tea, or go pet the kitties. When you come back, note the error message on the browser window. Repeat steps 3 and 4 as necessary.
4. After the .epub validates, give yourself a pat on the back. Good job!

### ***Step 5: Convert the .epub File to a .mobi File.***

1. Download and install Calibre, an e-book library manager, from <http://calibre-ebook.com/>
2. Open Calibre and add your .epub file to your Calibre library (“Add books” button). Click the title of your book to select it, then click the “Convert Books” button. A new window will display.
3. Make sure the input format is “EPUB” and the output format is “MOBI.” Go down the list of settings (Metadata, Look & Feel, etc.) on the left-hand side of the window.  
Metadata: This section is self-explanatory.  
Look & Feel: Self-explanatory.  
Page Setup: Output profile should be Kindle or Kindle DX or Mobipocket Books. (As far as I know, there’s no difference in the output except file type: .mobi or .prc.)  
Structure Detection: Earlier you might have, in InDesign, made separate files for each chapter so they’d start on new pages. That works for .epubs but not for .mobi. If you want pagebreaks, you have to find the tags where you want the breaks to be (they need to be unique) and enter them in the Xpath expression wizard (the buttons with the magic wand). You can get too many pagebreaks if you’re not careful. It’s okay. You can convert the file as many times as it takes to get it right.  
Table of Contents: The style names you used for your level 1, 2, and 3 headings should go in the “Level *n* TOC (Xpath expression)” area. This is the navigation table of contents.  
MOBI Output: If you already have a table of contents file with links created in InDesign, you don’t need to have another table of contents generated. (NOTE: There are two tables of contents, one that’s a readable page, and another that’s a navigation menu found sometimes on the left-hand side of the reader or as a dropdown from the top menu.)  
Click “OK” (at the bottom of the window).
4. You’re done! Your new .mobi file can be found in the directory that holds your Calibre e-books. The library directory can be found by clicking the library icon (it has the number of books in the library beneath it).

Note: I have tested the files produced using these directions on my PC with Kindle for Windows, Mobipocket Reader, Adobe Digital Editions, Calibre E-book Viewer, and the ePub plug-in for Firefox.

### ***E-book Conversion Services***

- <http://ebookarchitects.com/>
- <http://threepress.org/>
- <http://oreilly.com/digital-distribution.html> (includes distribution)
- <http://www.smashwords.com/> (includes distribution)