Calibre Quick Start Guide

by John Schember,

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Introduction

Calibre is an open source e-book management tool. Simply put, calibre allows you to organize your e-book collection, convert e-books to various formats, and interact with your e-book reader, all in an intuitive and friendly manner. It is compatible with Microsoft Windows—XP, Vista, and 7—as well as Apple's OS X (and various flavors of Linux). It was created by Kovid Goyal, who still leads its development. A number people around the world, including myself, contribute to calibre's development. Throughout this guide and the online docs you will see »**calibre**« instead of »Calibre«. That's how Kovid named his program, so that's what we call it.

The purpose of calibre is to simplify management of your e-book collection. It does this in several ways:

Calibre organizes your collection as a database so you can find the book you want when you need it. Calibre easily handles any size of collection, with a variety of tools to manipulate e-book metadata—title, author, rating, etc.

Calibre converts between multiple e-book formats.

Calibre supports a growing number of e-book readers, including Kindle, Sony, Nook, and many others.

Calibre is composed of three functional groups:

The graphical user interface (GUI). This is the typical mode of interacting with your database. All of calibre's principal functionality is available through the GUI.

A collection of command line (CLI) utilities for advanced calibre operations. For example, the command line tools are used by the ManyBooks service to convert on an as-needed basis.

An e-book reading application accessed from the GUI.

Installing calibre

The installation processes starts by downloading the installer for your operating system. Run the installer; when it finishes, launch calibre. You will now be greeted with a welcome wizard, which will help you initially configure calibre. The first page of the wizard allows you to change the storage location for your e-books.

If this is your first time using calibre, the storage location should not be an existing e-book collection, but a new empty directory for calibre's exclusive use. Calibre manages the e-books you give it in its own way. Think of the storage location directory as a black box. You don't do anything with it—it manages the contents of the storage location directory for you. If you have used calibre in the past and are installing a new version, or if you have moved your library, then it's okay to indicate a directory with existing calibre library. calibre is smart enough to know to use an existing library when it sees one.

Click „next" to be presented with an e-book reader selection. If your device is not listed, or if you intend to use more than one e-book reader, don't panic—just choose „default". This selection provides some conversion optimization for formats requiring fixed sizes. Click „next" and then „finish".

Congratulations, you've successfully installed and configured calibre! If at any time you want to run the welcome wizard again, click the downward facing arrow to the right of the Preferences button (looks like a set of three gears) in the top tool bar, then select „Run welcome wizard".

The Main Library Window, aka the GUI

Once the welcome wizard finishes you will be presented with the main application window. There are a few components I would like to bring to your attention. The central piece is the main book list. This takes up the majority of the window and displays the books in a table. Just above the main book list you will see the search area (more on this later) and above that, the tool bar. When you connect a supported e-book reader a Reader icon will appear next to the Books icon in the tool bar. You can switch between viewing books in your Library and books on your e-book reader by clicking on their respective icons.

The panel along the right of the window shows details about the currently selected book, including its cover. If you double click anywhere in the detail area (including on the book cover) another window will open exposing more information about the book.

At the bottom right of the window there are three icons and the word Jobs:

The curved arrow activates the cover flow view. Cover flow displays the book covers in a fashion similar to how a juke box lays out albums. The selected book is in the center while the neighboring covers are shown at an angle. You can navigate though the book covers with the left and right arrow keys on your keyboard. Click the curved arrow icon again to hide the cover flow view.

The luggage tag icon activates the tag browser view. More on this later.

The book toggles seeing the details panel along the right.

The spinning progress icon and the word „Jobs:" is one of the most important pieces of the interface. Whenever calibre is working on something (conversion, sending books to the reader, downloading news, etc.) this icon will spin, and the number next to jobs will display the number of jobs (activities) calibre is working on. You can click the icon to expose more detail about the jobs in progress.

Common Tasks

Let's take a look at a few common activities:

Organizing your e-book collection
Conversion
Downloading news from websites
Dealing with devices
Viewing e-books

Task 1: Organizing

The first part of organizing is getting your e-books into calibre's library. Click the **Add books** button in the tool bar at the top of the window, then select the e-books you would like calibre to import. When calibre imports your e-books it makes a copy of the book, storing it in the storage location you specified during initial setup. Once you've added an e-book, calibre doesn't need further access to the original file.

During an e-book import, calibre tries to read the metadata from the e-book. Metadata is information about the book that is stored within the e-book itself. Different formats support different information. Often the information is incomplete or just plain wrong. Don't worry—calibre makes it easy to fix this. Select the book whose metadata you want to change by clicking the book title in the main window. Then click **Edit metadata** on the top tool bar (to the right of the **Add books** button). The metadata editor will open.

The easy way to correct the metadata is to fill in the title and author, then click the **Download metadata** button at the bottom center of the **Edit Metadata** dialog. Calibre will display possible matches for the information entered. If there is more than one match select the entry that looks like the best match. A lot of information should be filled in now.

Above the **Download metadata** button and to the top, right of the cover image is the **Download cover** button. If the book doesn't have a cover showing or if you don't like the cover, click it to try to have calibre download one from the internet.

Now that you have your e-books in calibre there are a few different ways to find an e-book in your collection. Searching is one of the fastest ways. Above the library table there is a search bar with a binoculars icon to the left of the search text input field. Think of it like having Google built into calibre. Just

type a few key words into the Search text field. Try the author, title, series, or anything else from the e-book's metadata. E-books matching your search terms are shown as filtered results. The other e-books are still in your collection, but they won't be shown if the search expression doesn't find them.

You can also use the tag browser to search your collection. Along the left side of the window is the tag browser. If you don't see anything to the left of the library table, click the luggage tag icon in the lower right of the main window between the curved arrow and the book icon. A list will appear to the left of the library. It allows for you to display specific subsets of your collection to be shown in the main window. Clicking the disclosure triangle to the left of **Author**, **Series**, **Publisher**, **News** or **Tags** allows you to display just the e-books matching the criteria. Notice that as you enable items in the tag browser search queries are added to the search bar. The tag browser is really just an easy way to create search queries. You could type the query directly into the search bar and see the same result.

Task 2: Conversion

This is arguably the most useful, and most complex, feature calibre offers. Three of the most popular e-book readers today are the Amazon Kindle, the Sony Reader and the Barns & Noble Nook. Unfortunately, not all of these devices read the same kinds of e-books. This mess is like the one in the music world where you might find such formats as WMA, MP3 and AAC. In e-books, the same confusion exists—the Tower of eBabel, as some call it.

2.1: Background

If you are only buying e-book content from the store designed for your reader—for example, Amazon's Kindle Store or Sony's Reader Store—you don't need to worry about any of this. But there are very good reasons why you should know about the major formats, what formats your reader supports, and how to convert between formats.

In addition to regular e-books stores, many online sites offer free e-books, from public domain to texts offered at no charge by well known and lesser known authors. The **Get books** icon in the toolbar allows you to easily comparision shop by opening a store search dialog. This will search many different stores (uncheck or check the stores you want it to use on the left) stores helping you find the best price and the right format for the book you're looking for. Please note that this feature connects you to a third party, the store, so any issues related to a purchase should be directed to the store itself calibre is not part of this exchange.

Often you can download these e-books in a variety of formats, but you won't always find them in the format your e-book reader supports. Here is where conversion comes in. There is a very good chance that you will be able to take an e-book and convert it to a format your reader supports, as long as the book doesn't use Digital Rights Management (DRM) anti-copying technology.

In the rest of the conversion section I will focus on (1) the Amazon Kindle which supports the Mobipocket format, aka MOBI, and (2) the Sony Reader line

(the PRS line such as the PRS-600), which supports the EPUB format, and (3) the Barnes & Noble Nook, which also supports the EPUB format. (The Nook has some issues with DRMed books.)

2.2: Why are there different e-book formats?

Just why do so many different e-book formats exist? Advances in technology? In fact, that's a major reason. Just like the transition from VHS to DVD and now to Blu-Ray, older formats which were created to solve the problems faced at that time are replaced with newer formats that better meet the needs of today's e-book reader devices. A great example of this is the old books people read back in the '90s on their PDAs. Those devices were very limited in what they could display. E-book readers today are much more advanced. They can display large images and handle advanced formatting. These newer devices needed updated formats providing these features.

Another major reason is exclusivity. Many vendors like to control their own proprietary formats so they are not dependent on outside companies. They also have the benefit of being able to license their format for use by others. This allows them to lock users into their platform. E-books, being relatively new, are undergoing the same growing pains that Betamax and VHS or HD-DVD and Blu-Ray went though. The EPUB format, from the International Digital Publishing Forum, is an industry standard intended to reduce these problems. However, it has created problems of its own due to allowing companies to use their own in compatible DRM systems.

2.3: Conversion basics

The first thing you need to do is find out what formats your e-book reader supports. The Kindle supports AZW, MOBI, PRC, AZW1, TPZ, PDF and TXT. The PRS line from Sony supports EPUB, LRF, LRX, RTF, PDF and TXT. Don't let this scare or confuse you; all of the major e-book readers support multiple formats. Even with this jumble of letters, you only need to worry about the preferred format for the e-book reader. This preferred format is the one that gives the best formatting. As I mentioned earlier for the Kindle, you really only need to worry about Mobipocket (MOBI), and for the Sony Reader line (PRS) and Nook you only need to worry about EPUB. However, it is a good idea to be aware of all of the supported formats because it wouldn't make sense to convert an AZW to MOBI for reading on your Kindle because the Kindle can already read AZW books. Conversion is only necessary to fill in the gaps. For example, if you want to read an EPUB file on your Kindle you convert the EPUB to MOBI.

Converting e-book formats with calibre is simple and straightforward:

Open Calibre and select the e-book to convert in the library list.

Connect your e-book reader to your computer. Calibre takes a moment to detect and scan your e-book reader.

Click the **Send to device** button in the top tool bar.

Calibre is smart enough to know if the book is in a format supported by your reader. If it's not, it will ask you if you want to auto convert it. Say yes, and it will take care of the conversion and put the book on your reader.

That's all there is to it. Doing it is easier than it sounds because all you need to do is select the book you want on your device and click **Send to device**. Calibre worries about the formats and converting for you.

2.4: More robust conversion

Auto conversion is the easiest way to go and in most cases will be all you need to do. However, there are a large number of options that allow control over conversion process. Click the **Convert books** button in the top tool bar. This screen looks very complicated, but realize that the majority of options here are correctly set by default. Most of the options only need to be changed in special cases. There is one option that is very important and may need to be changed. At the top right there is a drop down for **Output format**. This controls what format the conversion will generate. Kindle owners will select MOBI and Sony and Nook owners will select EPUB.

In the conversion dialog there are a few things to check before clicking „OK" to begin the conversion. The first thing you need to do is double check the metadata and make adjustments if necessary. Also, click on the **Look & Feel** tab on the left side. The **Remove spacing between paragraphs** option is very popular. It will cause paragraphs to be formatted with an indent at the beginning instead of separating them with a blank line. It makes the result look more like a printed book than the default, which looks more like a web page.

Next click **Page Setup**. If you didn't select your device during the welcome wizard, you can set it here. The input and output profiles provide specialized optimization for your specified device. Be aware that not all formats are affected by the profile.

That's it for the basic conversion options. Every option in the conversion dialog has a description of what it does which is displayed when you hover the mouse cursor over it. Look though the options and play with them to produce output that suits your taste. Options set in the conversion dialog are saved on a per book basis. Each time you click convert for a particular book, the options from the last time you converted it will be remembered. However, your changes will not be applied to other books in your library.

Clicking **OK** closes the dialog and begins the conversion job. Look at the bottom right of the screen at the **Jobs** indicator. When it spins that means Calibre is working. Clicking it will show what job is being worked on.

When the conversion is finished the jobs count will drop by one. When the job count drops to zero the indicator will stop spinning. After the conversion is finished click the downward facing arrow to the right of the **Send to device** button. Select one of the **Send specific format** options (main memory is usually the best choice). A dialog will appear asking you which format you want to send. Select the format you chose in the conversion options. This allows you to specify what format you want sent to your device. If you don't explicitly select a format and you just click the **Send to device** button it will send the „preferred" format based on an internal format preference list which is device specific.

2.5: Limitations of conversion

Converting between e-book formats does have some limitations. One limitation of using a tool like Calibre is the inability to edit the e-book content before conversion. Calibre simply moves the existing content and layout from one format to another. Calibre is not a editing tool. If there are typos you wish to correct or layout changes you'd like to make, you will need to use a dedicated editing tool such as Sigil or Book Designer.

Another issue that often arises during conversion is missing or incomplete formatting. Not all e-book formats support the same formatting, so layout details may be lost when converting from one format to another. Formatting attributes, like bold and italics, will be preserved in most cases but complex page layout may not be. MOBI and EPUB both support complex formatting, so you won't have to worry about this as much when using these formats. However, MOBI does not support all formatting supported by EPUB. Margins and fonts are two notable exceptions.

Finally, conversion will only shift what the input provides into another format. It will not add anything that was not already in the input to the output. If the input is poorly formatted, the output will be too.

There are some conversion options, Search & Replace and Heuristic processing that allow for some modification of the book's content. These options should be used with care. Since they modify the book's content there is the possibility of losing something by accident. It's best to avoid these options unless you know what you're doing.

2.6: PDBs: they are not all created equal

This is of particular importance to 1st generation Nook owners. Barnes & Noble sells e-books in both the EPUB and PDB formats and both formats are supported by the Nook.

PDB is not really an e-book format. It is a container for e-book formats. Think of it like a zip file. You put other files into a zip file so you only have to worry about having one file instead of many. That is essentially what PDB does for e-books. There are 28 e-book formats that can be put into the PDB container that I'm currently aware of.

An e-book reader, like the Nook, which supports PDB does not support all the possible formats that may be within a PDB file. The two most common formats found in PDB files are PalmDoc (also known as textread and Aportis) and eReader. PalmDoc does not support any formatting or images. eReader supports basic formatting and 8-bit images. The PDB files sold by Barnes & Noble are in the eReader format.

If you're converting to the PDB format for use on the Nook be sure to go into the PDB Output options and set the format to eReader. Otherwise the conversion will come out missing things like images and pretty much all formatting.

2.7: DRM: the bane of conversion

DRM is an acronym for Digital Rights Management. What is DRM and why is it necessary?

Let's think about physical books for a moment. With a physical book, you can lend or resell your book. But when you do either, you are without the book. With e-books, that is not necessarily the case. E-books are just files on the computer and they can be copied any number of times and given away any number of times. DRM was designed to prevent unlimited copying of an electronic file. Some e-book reader users would also note that it is a handy way for companies to try to lock them into a specific brand.

DRM enables (or disables) various end-user rights as determined by the publisher and seller. Some DRM'd e-books can be read on more than one device. Some will allow for partial copying and printing. Some even allow for lending similar to physical books. Simply put, DRM restricts what you can do with your e-book.

An e-book with DRM cannot be converted to a different format. This is because conversion itself would require the removal of the DRM. Not all e-book formats support DRM and different e-book formats support different sets of privileges granted by the DRM. There is no way to move the DRM with the content when converting; thus DRM prevents conversion.

You might be tempted to look for some way to remove DRM from e-books in order to facilitate conversion. A word of warning about doing this: In the USA there is a law known as the Digital Millennium Copyright Act (DMCA). This law makes it illegal to circumvent a copy protection system (DRM is such a copy protection system). It also makes it illegal to produce tools, distribute tools, and aid in circumvention. Not everyone lives in the USA, but many countries have similar laws. Check your local laws and realize that even though you may only want to read an EPUB book that you've legally purchased on your Kindle, it may not be legal to do so. If you don't like this silliness—and I don't—then speak up to whoever in your country makes the relevant laws.

Task 3: Downloading News

This feature of calibre is often overlooked, especially by users who own an Amazon Kindle. Integrated into calibre is the ability to download news from a variety of sources. As of this writing 842 different sources („recipes") from all over the world, including both free and paid content, are supported. The real advantage of having calibre manage your news subscriptions is that once downloaded the content will be formatted for reading on your e-book reader. However, you can still read the news right on your computer. If you're going to be reading the downloaded news on an e-book reader it's best to go into **Preferences** select **Behavior** and set the **Preferred output format** in General options to the preferred format for your e-book reader. This would be MOBI for Kindle, and EPUB for the Sony Readers and Nook.

Click the **Fetch news** button in the top tool bar to open the news download scheduler. With so many sources the best thing to do is find the ones you like and set them to automatically download at a time convenient for you. If you don't want to schedule automatic downloads and would rather handle it

manually, you can. Just use the ***Download now*** button that appears when you have selected a news source.

In the news download scheduler you can expand the categories that are relevant to you (the ones in languages you can read) by clicking the disclosure triangles to the left of the language groupings. Look through the recipes for something of interest. When you find one of interest, select it and check the ***Schedule for download*** check box on the right, or click ***Download now***. You can also set how often and when you want it to download. Once downloaded the content will be converted to an e-book according to your conversion preferences.

By default when you connect your e-book reader calibre will automatically transfer the downloaded news to the device. If you don't want this to happen, and would rather transfer manually go into the ***Preferences***, select the ***Behavior category***, and uncheck ***Automatically send downloaded news to ebook reader***. Also, if you do want it send to the reader automatically it's usually a good idea to check the ***Delete news from library when automatically sent to reader***.

Task 4: Interacting with e-book readers

In my mind the reason people start reading e-books as opposed to physical books (p-books) is due to e-book readers. That's precisely why I started collecting e-books. Calibre has full support for a wide variety of e-book readers. In total, calibre currently supports over 40 e-book readers. Yep, over 40. Everything from eInk devices like the Kindle, Sony and Nook to cell phones and tablets.

4.1: Putting an e-book on your e-book reader

Connect your e-book reader to your computer, and start calibre if it's not already running. If your device is supported by calibre a ***Device*** icon will appear next to the ***Books*** button in the tool bar. Clicking the ***Device*** icon will switch the main book list from your library to a listing of e-books on your connected device. If you want to send an e-book to your device just switch back to your library, select the book and click ***Send to device*** in the top tool bar. It really is that simple. Another often-used feature is to select a book on the device and click the ***Remove books*** button in the top tool bar, removing the e-book from your e-book reader.

Once you've finished refreshing the e-book content stored on your device click the down arrow next to the ***Device*** button. You will see an eject icon (upward-pointing triangle inside a circle). Clicking the eject icon disconnects your e-book reader from the computer. Always eject your device before disconnecting it. Bad things can happen if you don't do this.

4.2: E-book reader optional configuration

There are a number of different ways you can configure calibre to interact with your device, but I'm only going to touch on the two most common.

Open up **Preferences** and click **Sending books to devices**. Here you can customize the save template to change where e-books are saved on your device. If you have experience with music tagging programs where you can create custom save locations this should look very familiar. If you have a device like the Kindle or Sony Reader this isn't very useful and can safely be left with the default settings. If you have a device like the Cybook Gen 3 that supports folders this is extremely useful. There are a number of variables (descriptions under the template) which can be used to change where the books are saved. Lets look at a basic example, „favorites/{title}—{authors}". {title} will be replaced with the title of the book, {authors} will be replaced with its author and the book will be put into the favorites folder. All of the replacements that can be made in the save template are listed with descriptions under the entry area.

Another useful configuration change is disabling and reorganizing the supported formats. Let's use the Cybook Gen 3 again as an example. In **Preferences**, click **Plugins**, then go to **Device Interface plugins**, select the **Cybook Gen 3 Device Interface** and click customize plugin. The first thing in the configuration for the device is the format list. Here you can uncheck formats you don't want sent to your e-book reader. You can also reorder the formats. The format at the top of the list (must be checked) will be the one used for automatic conversion when sending an e-book in an unsupported (or unchecked) format to the device.

Task 5: The e-book viewer

I've hinted that calibre has the ability to view e-books too. All you need to do is select the e-book you want to read and click the **View** button in the tool bar to have calibre open the e-book in calibre's internal e-book viewer. The viewer supports everything you might expect such as bookmarks and navigation via the table of contents (if the e-book has one). The viewer, however, cannot read books protected with DRM.

Where to get help

The first place to look for help is in the **Preferences** dialog. All options have clear descriptions, and there are a lot of options. If you want to change something about calibre there may already be an option for it. It's also a good idea to familiarize yourself with the preferences because parts of it, such as conversion, are just defaults and will be presented to you at different times for fine-tuning on a per e-book basis.

The next place to look is the online user manual. Click the **Help** botton in the tool bar to have it open. There is a wealth of information in the user manual including tips and solutions to common problems. It's also a good idea to check the calibre FAQ for answers to common questions.

Finally, there is the calibre forum on Mobileread wich is the official help forum. There are a number of knowledgeable users who answer questions. Also, Kovid and myself actively participate in helping new and veteran users. If you

have a question or need help this is the best place to go. If you've found a bug or would like to request a new feature it's okay to ask about it on the forum but it's also a good idea to submit it to the projects bug/issue tracking system. Forum posts tend to get lost over time while the tracking system makes it easy to see what needs fixing or worked on.