



Designing and Developing Inclusive Open Textbooks

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INDIRA KONERU



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COL-UMS 3-Day Workshop on Development of Inclusive Open Textbooks Using Pressbooks

In line with the National Inclusive Open Educational Resources Policy (iOER), Malaysia, Universiti Malaysia Sabah (UMS) in collaboration with Commonwealth of Learning (COL) is organizing a 3-day workshop on Developing Inclusive Open Textbooks Using Pressbooks. The workshop will equip the participants with the skills required to design and develop inclusive and interactive open textbooks.

Workshop Outcomes

After participating in the workshop, participants will be able to:

- Design open textbooks
- Find OER text, images, videos
- Convert OER into H5P interactive content using Lumi desktop app
- Explore Pressbooks functionality and dashboard
- Add Book Info and metadata
- Structure open textbook into parts and chapters
- Develop open textbooks chapters content
- Create accessible and inclusive open textbooks
- Embed media and H5P interactive content
- Create glossary of terms
- Import content

- Publish open textbooks

National Inclusive Open Educational Resources Policy (iOER), Malaysia

The National Inclusive Open Educational Resources Policy (iOER), Malaysia was developed as a response to the need for ensuring inclusive learning opportunities that benefit all learners, including those that are differently-abled, in Malaysia.

This innovative policy is aligned with the implementation of the 2019 UNESCO Recommendation on OER adopted by UNESCO's General Conference at its 40th session. 2019 UNESCO Recommendation on OER calls on 193 member states to undertake actions on the following five areas:

1. build capacity of stakeholders to create access, use, adapt and redistribute OER
2. develop supportive policy
3. encourage inclusive and equitable quality OER
4. nurture the creation of sustainability models for OER
5. facilitate further international cooperation

The 2019 UNESCO Recommendation on OER supports mainstreaming of OERs and achieving 2030 for achieving 2030 Sustainable Development Agenda 4 (SDG 4) – Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all.

The OER Recommendation 2019 supports the mainstreaming of OERs to assist all 193 member states in the engendering of inclusive knowledge societies with the long-term objective of achieving the 2030 sustainable development agenda with reference to the

Sustainable Development Goal (SDG) 4 (Quality education), SDG 5 (Gender equality), SDG 9 (Industry, innovation and infrastructure), SDG 10 (Reduced inequalities within and across countries), SDG 16 (Peace, justice and strong institutions) and SDG 17 (Partnerships for the goals).

MANAGE YOUR PRESSBOOKS ACCOUNT

Key Takeaways

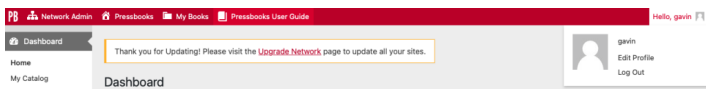
This section content enables you to:

- Update Your User Profile
- Change Your Password

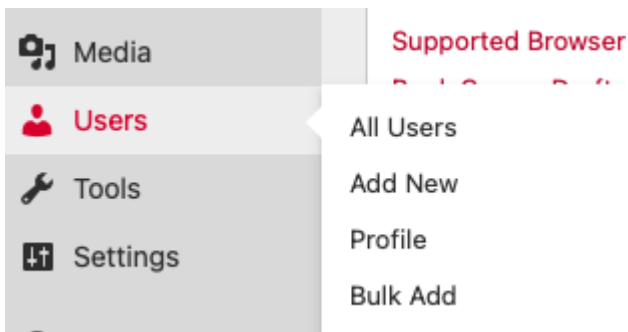
PRESSBOOKS

You can edit your User Profile to change account information, enable accessibility features, establish your user interface language, and more. There are two ways to access your user profile.

1. You can hover over your name in the top menu of Pressbooks and click **Edit Profile**:



2. Alternatively, you can hover over **Users** in your book dashboard and select **Profile**.



Personal Options

The screenshot shows the 'Personal Options' settings page. It includes several sections with checkboxes and a dropdown menu:

- Visual Editor:** Disable the visual editor when writing
- Syntax Highlighting:** Disable syntax highlighting when editing code
- Admin Color Scheme:** Two radio buttons: Pressbooks (with a red color swatch) and Pressbooks a11y (with a black and red color swatch)
- Keyboard Shortcuts:** Enable keyboard shortcuts for comment moderation. [More information](#)
- Toolbar:** Show Toolbar when viewing site
- Language:** A dropdown menu set to 'Site Default'.

Personal Options in Pressbooks include the following features:

Visual Editor: Choose to enable or disable the visual editor while writing. When the visual editor is disabled, all content editors display only the text editor view, which allows users to edit the chapter in HTML format.

Syntax Highlighting: Choose to enable or disable syntax highlighting when editing code.

Admin Color Scheme: Choose between the default Pressbooks color scheme and the Pressbooks a11y color scheme. The a11y color scheme changes the admin display to use stronger color contrasts between elements and underlines all link text in the admin menu (ensuring that more than just color is used to signal to users that text is a link).

The screenshot shows the Pressbooks admin interface. The top navigation bar includes 'Network Admin', 'Fruil University', 'My Catalog', 'Test Book 2', and 'Hello, tmccorah'. The main content area shows the 'Test Book 2' page with a sidebar on the left containing navigation links like 'Dashboard', 'Organize', 'Organize', 'Add Part', 'Add Chapter', etc. The main content area displays the 'Test Book 2' page with a word count of 723986 (whole book) / 700930 (selected for export). Below this is a table with columns for 'Front Matter', 'Authors', 'Comments', 'Show in Web', 'Show in Exports', and 'Show Title'.

Front Matter	Authors	Comments	Show in Web	Show in Exports	Show Title
sketchfab	—	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Preface to College Physics	—	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Keyboard Shortcuts: Choose to enable keyboard shortcuts to assist in comment moderation on webbooks. Comments can be enabled by a book administrator for any webbook. To read more about keyboard shortcuts for comment moderation, see the WordPress Codex.

Toolbar: Choose whether to view the Toolbar by default when using Pressbooks.

Language: Choose what language to use Pressbooks in. Your profile will be set to **Site Default**. When **Site Default** is selected, your user interface will always be in the language assigned in the book metadata for the specific book you're editing. You can choose to override this by selecting a specific interface language (if additional languages are installed on your network). Your user profile language is personal to you. It will be applied for all the books you work on, but won't affect anyone else working on the same book as you. Each user can set their own language as best suits them.

Note: If you do not see your preferred language here, contact your network manager to ask about installing localization files for that language.

Name

Username: Your username is the only piece of account information that you cannot change.

First Name and **Last Name:** Insert your first and last name if you would like your name to display in the interface instead of your username.

Nickname: Your nickname defaults to your username. This can

be changed if you'd like your username to display as something different.

Display name publicly as: Choose whether the name that displays in the Pressbooks interface is your full name, your first name, your last name, your username, or your nickname.

Contact Info

Email: Change what email account is associated with your Pressbooks account. By default, this field will be filled with the email address you used to register for Pressbooks. You can enter a new email address here to change it. You'll receive an email to confirm the change; the new email address will not be connected to your account until you've confirmed the change.

Website, Twitter URL, LinkedIn URL, GitHub URL: Insert a valid URL for your website and profiles on Twitter, LinkedIn, or GitHub. Each of these fields is optional. Information entered here will be added to your 'Contributor' profile within specific books whenever you are added to a book with a user role which allows creating or editing content.

Website	<input type="text" value="https://steelwagstaff.info"/>
Twitter URL	<input type="text" value="https://twitter.com/steelwagstaff"/>
LinkedIn URL	<input type="text" value="https://www.linkedin.com/in/steel-wagstaff/"/>
GitHub URL	<input type="text" value="https://github.com/SteelWagstaff"/>

About Yourself

Institution, biographical Info: Insert your institutional affiliation and a biography. This information is optional. Information entered here will be added to your ‘Contributor’ profile within specific books whenever you are added to a book with a user role which allows creating or editing content.

About Yourself

Institution
Your institutional affiliation, e.g. Rebus Foundation, Open University, Amnesty International.


Biographical Info

Steel is the educational product manager for Pressbooks, a small Canadian startup which makes open source book publishing software. He taught English for at the university level for a decade, and worked outside the academy as a land surveyor, prison educator, and mentor/tutor for elementary school-aged kids. He earned a Ph.D. in English and a master's degree in Library and Information Studies from the University of Wisconsin-Madison and now lives in Eugene, Oregon.


Share a little biographical information to fill out your profile. This may be shown publicly.

Profile Picture: Add a profile picture to Pressbooks by associating your account with Gravatar. If you have a Gravatar profile picture associated with your email address, it will be used when your ‘Contributor’ is initial created.

Profile Picture



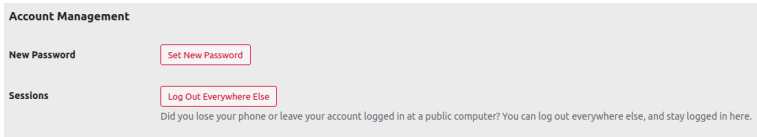
[You can change your profile picture on Gravatar.](#)

 One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=20#oembed-1>

Account Management

New Password: Change your password while logged into Pressbooks. Click “Generate Password” to generate a random password for your account. If you don’t want a random password, erase the random generate characters and insert a password of your own. For more information, see Changing Your Password.

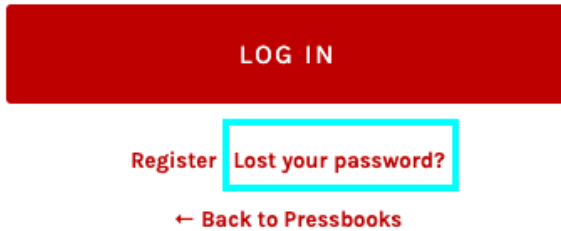
Sessions: Log out of your account from multiple devices or browsers at once by clicking “Log Out Everywhere Else.”



Changing Your Password When You Can't Log In

If you need to reset your password in order to access Pressbooks, follow these steps:

1. Visit your network's login page
2. Click the **Lost your password?** link underneath the sign in form



3. Enter your username or email address into the Lost Password form and click **Get New Password**

LOST PASSWORD

Please enter your username or email address. You will receive a link to create a new password via email.

Username or Email Address

GET NEW PASSWORD

[Log in](#) | [Register](#)

[← Back to Pressbooks](#)

4. An email will be sent to you the email account associated with your Pressbooks account with instructions for confirming that you would like to change your password. Click the link provided in this email.
5. Enter your new password in the Reset Password form and click **Reset Password**

RESET PASSWORD

Enter your new password below.

New password

1wzNYE900%x3SWnp



Strong

Hint: The password should be at least twelve characters long. To make it stronger, use upper and lower case letters, numbers, and symbols like ! " ? \$ % ^ &).

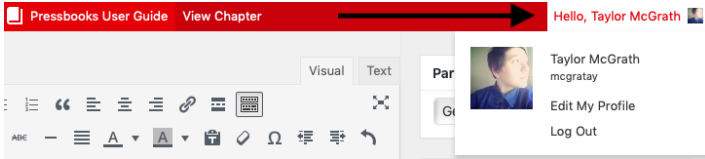
RESET PASSWORD

6. Your password has now been reset, and you can use this new password to login to your Pressbooks account.

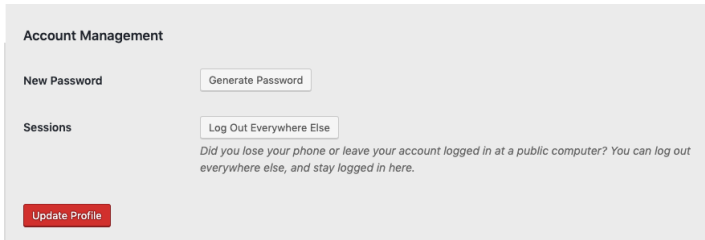
Changing Your Password When You're Already Logged In

If you'd like to change your password while already logged in to Pressbooks:

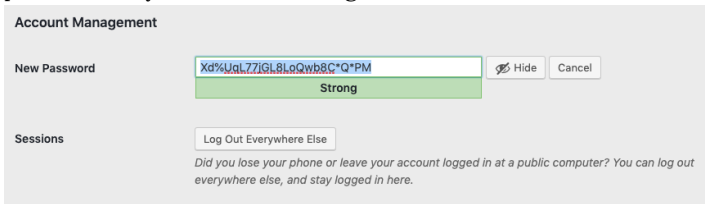
1. Hover over your name in the top menu in Pressbooks and click **Edit My Profile**



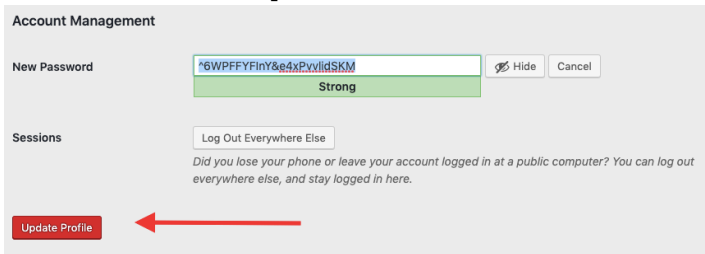
2. Scroll down to the Account Management section and click **Generate Password**



3. Pressbooks will autogenerate a new, secure, password for you to use. If you prefer, you can manually replace this with a password of your own choosing.



4. Once you are satisfied with your password, **Click Update Profile to save the new password**



DESIGNING OPEN TEXTBOOKS

Learning Outcomes

After completing this section, you will be able to:

- plan open textbook structure
- design pedagogical elements

Design is a very important part of the creation process. Design can have an impact on the accessibility of the text and affect the overall experience of the reader. This is particularly important for open textbooks where the goal of the text is to engage and support students in their learning.

A textbook is an organized body of material useful for the formal study of a subject area. It should be discrete, and well-bounded in scope and the text material should relate to a solid understanding of the subject, usually mixing theory and practice for each topic as it covers the subject domain. The textbook should also use examples and problems to assist the student in better grasping each presented concept by following examples, and then applying the concept in structured exercises or problems. The textbook should have an internally consistent style and there should be little or no surprises for the student in terms of layout and presentation of material. The texts user can get comfortable with the layout, the tempo of presentation, and the pattern of figures, illustrations, examples, and exercises. Once reviewed, the textbook should isolate material that is useful to the future application of subject knowledge in well-organized appendices and tables. Finally, the textbook is a structured resource and is not just a collection of useful material. The textbook is a guide for the student for an order of review that will aid in mastering the subject area. Topics are presented in major parts, chapters, sections, and subsections that are organized in a way that facilitates understanding. This means that the text's organization is based on the intersection of two requirements. The first of these are the requirements of the subject domain. Since most textbooks are developed by, or based on the contributions of subject matter experts, this requirement is usually well attended to.

The second requirement is defined by the limits of the student's mind. Cognition is a common human ability, but its needs and limits are frequently ignored by those who have already mastered a

subject area. To make the best use of the student's abilities, some rules can be spelled out for the structuring and presentation of ideas, concepts, and material.

The following rules will help you create the best text possible for student learning.

Rule of Frameworks

Memory and understanding are promoted by the use of a structure that mimics the structures we all use within our minds to store information. Before we can use or master a subject, we have to have a mental road map that allows us to navigate within and through the subject domain. The text can best aid understanding by making this framework visible early on within each section or topic. The extent to which the student understands that they are using a framework, and knows what that framework is, is important as they internalize and make use of the material presented.

To follow the rule of frameworks, the structure of the text needs to act as a mental roadmap that allows learners to navigate within and through the subject domain. To best aid in understanding, the structure should be visible early on. This can be achieved by establishing a consistent organizational structure (including individual chapters), format and design elements (textboxes and colour choices). If your textbook includes many different textboxes or colour choices, having a front-matter section dedicated to explaining this is extremely useful.

Examples of the Rule of Frameworks

Business Ethics (OpenStax)

Frameworks can be seen in this textbook both in the overall organization and the individual chapters. Each section consistently starts with an introduction and ends with a summary, list of key terms used in that section, assessment questions, and the end notes.

Digital Accessibility as a Business Practice

This textbook uses differently coloured textboxes according to what information they contain. By clearly explaining to readers how the colours are used, readers can navigate through the content with familiarity.

Rule of Meaningful Names

Everything we know is tagged with an index or a title. These indices are critical to the ability to recall or retrieve the things we know and remember. Each concept, process, technique or fact presented should aid the student to assign a meaningful name for it in their own mental organization of the material. To be most useful, these names shouldn't have to be relearned at higher levels of study. The names assigned by the text should be useful in that they support some future activities: communication with other practitioners, reference within the text to earlier mastered material, and conformity to the framework used for the subject. Each unique element of the subject domain should have a unique name, and each name should be used for only one element.

To follow the rule of meaningful names, create and use consistent titles and terminologies. Use terminology that is common in your discipline. These names are critical to the ability to recall or retrieve the things we know and remember. This can be achieved by

including glossary/key term pages, planning your content structure, and reviewing for consistency.

Example of the Rule of Meaningful Names

Media Studies 101

The first section in this textbook is spent explaining and defining key concepts and terms that are used for later discussion of larger concepts and theories.

Rule of Manageable Numbers

When we learn from an outline, an illustration, or an example, most of us are limited in our ability to absorb new material. As we become familiar with part of a subject domain this number expands, but for new material four to six new elements is a reasonable limit. If a chapter outline contains twelve items, the student will have forgotten the outline before getting to the last item. When a text fails to support this rule, it requires even a diligent student to needlessly repeat material.

To follow the rule of manageable numbers, limit the amount of information introduced at one time. Most of us are limited in our ability to absorb new material. As we become familiar with part of a subject domain, this number expands. This can be achieved by breaking your chapters into smaller sections, focusing on learning objectives at a higher concept level, and planning your content structure.

Example of the Rule of Manageable Numbers

The Word on College Reading and Writing

This textbook keeps their lists and concepts within the four to six range

Rule of Hierarchy

Our mental frameworks are hierarchical. Learning is aided by using the student's ability to couple or link new material with concepts that they have already mastered. When presenting new domains for hierarchical understanding, the rules for meaningful names and manageable numbers have increased importance and more limited application. A maximum of three levels of hierarchy should be presented at one time. The root should be already mastered, the current element under consideration clearly examined, and lower levels outlined only to the extent that they help the student understand the scope or importance of the current element. This area is supplemented by two more rules within this rule: those of Connectivity and Cohesion. Connectivity requires consideration of what the student likely knows at this point. The more already mastered elements that one can connect with a new element, the easier it is to retain. Cohesion requires that the characteristics of new elements as they are presented be tightly coupled.

To follow the rule of hierarchy, your text needs builds on learned knowledge. When introducing new material, only refer to

foundational material if it is relevant to the new material. The student needs to understand the foundational knowledge before being introduced to a new concept. When new concepts are introduced they should be explicitly connected to the foundational material. This can be achieved by planning your content structure, reviewing for connectivity, and have beta readers who are not experts in the subject.

Example of the Rule of Hierarchy

Information Systems for Business and Beyond

This textbook spends the first section explaining core concepts so that readers will be able to discuss the later concepts with more familiarity. Each section builds off of what was previously learned and new information is learned with background and context already established.

Rule of Repetition

Repetition and patterns support short-term and long-term memory. Constructing your textbook with this in mind can support learners in the process of retaining the information delivered to them.

To follow the rule of repetition, repeat important concepts. There is a pattern of repetition that aids in promoting the elements of a subject from short-term to long-term memory. This can be

achieved by reviewing your content to determine which information should be repeated and how often.

Example of the Rule of Repetition

Vital Sign Measurement Across the Lifespan

This textbook repeats concepts taught within the chapter through a series of activities and self-testing exercises.

Adaption

- Adapted from “The 5 Rules of Textbook Development” by Amanda Coolidge at BCCampus licensed under a Creative Commons Attribution 4.0 International Licence except where otherwise noted.
- Adapted from “Textbook Considerations” at Wikibooks licensed under a Creative Commons Attribution-ShareAlike License except where otherwise noted.

You will notice that open textbooks are available in a number of different technical formats, some of which may not be familiar to you. The reason for this is because research into student preferences around textbook formats shows that students want flexibility and options. Some students, prefer physical textbooks, some want their textbook delivered to their favourite eReader device, and others prefer the familiarity of a PDF or a website.¹

Here is a brief guide to the different types of document formats that open textbooks are most often available in.

EPUB

EPUB is a standard format for ebooks. Students will need an eReader to use EPUB files. eReaders are available as stand-alone devices (such as a Nook or Kobo reader) and as software packages that students can install on their PC, Mac, tablet, or mobile phone.

There are a number of eReaders available for free, and many have features such as cloud syncing, which allows users to read their book on their tablet, PC, and phone and keep the book in sync. Many also offer annotation and highlighting capabilities.

EPUB is superior to PDF in that the text in EPUB files can shift to fit the size of the device being used to read the book, giving the user a smooth side-to-side reading experience. eReaders also often provide options to resize the text, change the font, or change the colour of the text.

1. Clint Lalonde, "Open Textbook Formats Explained," *BCcampus OpenEd*, August 30, 2013, <https://open.bccampus.ca/2013/08/30/open-textbook-formats-explained/> (accessed January 24, 2018).

Those who have a Nook, Kobo, or other dedicated eReading device or have downloaded and installed eReader software on their tablet, PC, or mobile device will want to use an EPUB file. Note that Kindle does not support EPUB. Instead Kindle users will want to use the MOBI format (see below).

eReader Software and Devices Compatible with EPUB

Software	Supported Platforms	eReader Device Available	Registration	Open Source
Adobe Digital Editions	PC, Mac, Android, iOS	No	No	No
Kobo	PC, Mac, Android, iOS	Yes	Yes	No
Nook	PC, Mac, Android, iOS	Yes	Yes	No
Google Play Books	Android	No	Yes – Google	No
iBooks	iOS	No	Yes	No
Calibre	PC, Mac, Android, iOS	No	No	Yes

These are just a few of the many EPUB readers available. Wikipedia has an extensive comparison list of eReaders.

MOBI

Students should choose the **MOBI** format if they have an Amazon Kindle or use the Amazon Kindle software, which anyone can download. Kindle apps and software are available for download on Mac, PC, Android, BlackBerry, Windows OS, and iOS.

Website/HTML

An HTML website is a good format to use to distribute your textbook to students as it is a universal format that does not require any additional software beyond a web browser. HTML is also a good format to distribute your textbook in if you want others to be able to edit or customize your book. If possible, you can create a zip file of your HTML documents and make those available for other instructors to download, edit and host on their own websites.

PDF

PDF is a common file format that requires a PDF reader. Free PDF readers include Adobe Reader, Foxit, and Nitro. PDF is a good format to make available to students because it is common and most students will know how to work with a PDF document. However, PDFs are difficult to edit, so if you plan to openly license your textbook, you should also make your source files available so other instructors can edit the book.

Word/OpenOffice

Some open textbooks are available as Word/OpenOffice documents. These file formats will have the .docx or .odt file extensions. You will need Microsoft Word or OpenOffice to view these files. Word/OpenOffice documents can be used to distribute a textbook to students as it is a common file format. However, it is more common that you would convert the Word/OpenOffice document to a PDF, EPUB or HTML file for distribution to students and provide Word/OpenOffice as a source file for others who may want to edit or adapt the textbook.

LaTeX

LaTeX is a document format often used when complex scientific or mathematical equations and notations are required. LaTeX requires special software to read and edit. These files are not recommended for students and are primarily provided as source files for instructors who wish to modify or customize a textbook.

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Attributions

Information and much of the text used in this chapter are based on the blog “Open Textbook Formats Explained” by Clint Lalonde and is used under a CC BY 4.0 Licence.

Before you begin writing, create an outline that details the topics to be covered in your textbook and how they will be organized in a table of contents. Consider the type of students who will use your textbook and the course level and program for which the textbook is intended. Taking time to consider the audience and classroom will direct the tone and complexity of your writing. As such, it should be scheduled in your project timeline. This vital step will save time and money, reduce mistakes, and hopefully result in a more useful, engaging textbook. (See Project Timeline.)

Details and decisions

An outline is most useful when it includes all the details needed to build and arrange your book. Recruiting a copy editor at this early stage, someone who can ensure that all elements and layout are covered, will save time later in the project. The copy editor can also assist you with selecting a style guide and setting up a style sheet, which they will reference during the copy-editing and proofreading phases. (See How to Copy Edit and Create a Style Sheet.)

Front matter

The **front matter** is the introductory section of your textbook and the first thing readers see. If you're using an authoring platform such as Pressbooks, the system will set up some of these sections for you, including a copyright page and a table of contents. The following table lists the items typically included in the front matter and the order in which they appear. While most open textbooks will

have many of these elements, very few will have all of them. Only include the sections relevant to your textbook.

Front Matter¹

Item	Responsibility	Purpose
Half title	Publisher	Includes just the title of the book on the recto (front side of the page) with a blank verso (back side of the page).
Title page	Publisher	Book title is repeated along with subtitle (if any), author(s) and/or editor(s), and illustrator (if any). On the verso of title page, the following may be included:
Copyright page	Publisher	<ul style="list-style-type: none"> • open-licence information (type, definition, where to obtain free copy of book) • if an adaptation, the changes made • attribution for cover image • publisher's name and address • copyright notice • ISBN • date of publication and publishing history • printing information
Disclaimers	Publisher	These can appear on the colophon or separately after the title page.
Dedication	Author	The person or people for whom the author has written or dedicated the book.
Table of contents	Publisher	A list of all parts and chapters (or chapters and chapter sections) together with their respective page numbers. Front-matter items that appear after the table of contents are also included.
About this book	Publisher	This page is used to define open textbooks and other OER, and any other unique features for this type of book. Funding provided by the author's institution, a public body, or philanthropic organization can also be noted.
List of illustrations and/or tables	Publisher	This summary is useful for the reader.

Foreword	Expert (not the author)	The forward is typically written by an outside expert in the field at the request of the primary author. The foreword author's name, place, and date are included at the end of the statement.
Preface	Author	The author uses the preface to explain why and how they came to write the book. They might also describe their expertise in the subject area.
Acknowledgements	Author	This is a list of individuals whom the author acknowledges for their contributions and assistance.
Introduction	Author	This introduction describes the book contents as a whole. The book's theme, layout, special features, and how instructors can make the best use of it, can also be included. The author may also create a "How to Use This Book" section if more fitting.
List of abbreviations	Publisher	This list of abbreviations and their meanings is useful for the reader.
Accessibility statement	Publisher	If the book has been written and designed to be accessible, provide a description of how this was done and various options people have when accessing the book. Indicate the standards that have been followed, and provide contact information for where people can report any accessibility issues. (See Accessibility and Inclusion.)
Publisher's, translator's, or editor's notes	Publisher	This information provides background on various aspects of the book's creation depending on who writes the notes.

1. "Book Design," *Wikipedia*, https://en.wikipedia.org/wiki/Book_design (accessed November 15, 2017).

Body

As you shape the content of your textbook's main body, ask these questions:

- How will the main body be divided? Indicate if parts or units will be used.
- Will each chapter include chapter sections? (If chapter sections are included in the table of contents, it is easier for students and other instructors who might use your textbook to see at a glance the textbook's content and navigate through the book.)
- Will numbering and/or titles be used to identify parts, units, chapters, and chapter sections? If possible, include these in the outline. (Titles and numbering can be changed in the final draft, but establishing working titles helps during the organizational phase.)
- How long should the book be? Estimate the word count for the entire book, and then break this number down into individual chapters.

Next, consider the layout, style, and length for each chapter and chapter section. Decide what elements to incorporate such as:

- Learning objectives or outcomes that align with the textbook content, typically identified at the beginning of each unit, chapter, or chapter section
- Chapter introduction
- Exercises, essay questions, practice quizzes, or other methods for the student to self-test during reading or for the instructor to use for grading
- Key terms, highlighted and defined throughout the textbook; some authors summarize these in a Glossary placed in the back matter
- Chapter-end summary or list of key points or key takeaways

- Suggested/additional reading lists at the end of each chapter or in the back matter
- Resources (photos, illustrations, diagrams, graphs, charts, tables) and how they will be labeled, numbered, and captioned. Will these items be original creations or retrieved from external sources? (See Resources: Search and Find.)
- Multimedia (videos and audio clips) for online textbooks. Will these be embedded or will a link be provided? How will these elements be labeled, numbered, and captioned? Will transcripts be provided to ensure accessibility? Will you offer editable files? (See the BCcampus Open Education Accessibility Toolkit.)

Estimate the amount of time needed to create each item for each chapter or chapter section – and then double it. The majority of self-publishing authors underestimate the amount of time required to write and produce or collect resources and multimedia. If tasks are completed ahead of schedule, bank this extra time for other delays later on. Ask your copy editor to include the above items on their review list.

Back matter

Items at the end, or as part of the **back matter**, of a textbook are typically supplements to the main text.

Back Matter²

Item	Responsibility	Purpose
Appendix / appendices	Author	An appendix provides supplementary material to information found in the main work. In cases where there are more than one appendices, they can be numbered and described for easier reference.
Glossary	Author	The glossary is a list of keywords or terms used within the book and their definitions. These terms are listed alphabetically. Many authors will highlight key terms when first defined in-text using bold or italics.
Reference list	Author	A reference list notes all resources cited within a textbook and lists them alphabetically by the author's last name.
Bibliography	Author	Typically, a bibliography refers to all works used as references within a textbook, both cited and read as background in preparation for writing. Note: A bibliography is not used by all style guides.
Suggested readings	Author	A list of additional books, articles, and other readings can be included here for students. Some authors choose to add suggested-reading lists, targeted at the subject covered in a chapter, at the end of each chapter.
Resources	Author	A list of helpful resources, such as videos and tools, can be added here.
About the author / Bio	Publisher	This page has author's biography followed by the biographies of any contributing authors listed in alphabetical order. This description is professional in nature and describes the author's expertise, experience, and training in the textbook's subject matter. A photo can be included.
Call for reviews	Author	This page can be included if the author is posting the textbook outside of a collection that provides for book reviews. (See Textbook Reviews.)

2. "Book Design," *Wikipedia*, https://en.wikipedia.org/wiki/Book_design (accessed November 15, 2017), "Book Elements: A

Index	Publisher	<p>This list of keywords and terms is laid out alphabetically and includes the page numbers of where they can be found. Indexes are often left out of open textbooks, especially those available online, because keywords and terms can be easily found using the search field. In addition, because open textbooks are often available in a number of formats, it's difficult to provide an index that will be useful in all formats.</p>
Versioning history	Publisher	<p>As open textbooks are often digital and available online, there is a certain expectation that minor corrections and updates be made as necessary, even after the book is live and completed. BCcampus has dedicated "Versioning History" pages to the back matter of its books for this purpose. This page provides information about how to report an error in the textbook, as well as a record of any updates and changes made in the textbook and the date of those changes.</p>

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Attributions

Front Matter and Back Matter tables: Some of this information was

Literary Anatomy Lesson," *Authors.me*, October 12, 2016, <https://www.authors.me/the-anatomy-of-a-book/> (accessed January 16, 2018), and "What is Back Matter," *Scribendi*, https://www.scribendi.com/advice/what_is_back_matter.en.html (accessed January 16, 2018).

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ADAPTING OER & OPEN TEXTBOOKS

Section Topics

This section includes:

- Reasons to Adapt an Open Textbook
- Permission to Adapt
- Three Steps Before You Begin
- Start Small

Definition

The term OER (Open Educational Resources) was first defined by UNESCO in 2002 as “any type of educational materials that are in the public domain or introduced with an open license” and can “range from textbooks to curricula, syllabi, lecture notes, assignments, tests, projects, audio, video and animation.”

Creative Commons created the “What is OER?” table below to compare different definitions of OER from various sources.

	Open copyright license required	Right of access, adaptation, and republication	Non-discriminatory (rights given to everyone, everywhere)	Does not limit use or form (does not include NonCommercial limitations)
Hewlett Foundation	✓	✓	✓	✓
OECD		✓		
UNESCO	✓	✓	✓	✓
Cape Town Declaration	✓	✓	✓	
Wikieducator OER Handbook		✓	✓	✓
OER Commons		✓	✓	✓

Although many people think of OER and Open Education as generally referring to online-only material and courses, this is not the case. Many open textbooks, for example, are also available in hard copy, or can be printed if a user prefers.

The 5 Rs of Openness

As seen in the table above, OER differ from traditional educational

resources in their licensing and permissions. Namely, the “open” aspect of OER can be defined by David Wiley’s 5R Framework:¹

- **Retain:** the right to make, own, and control copies of the content
- **Reuse:** the right to use the content in a wide range of ways (e.g., in a class, in a study group, on a website, in a video)
- **Revise:** the right to adapt, adjust, modify, or alter the content itself (e.g., translate the content into another language)
- **Remix:** the right to combine the original or revised content with other open content to create something new (e.g., incorporate the content into a mashup)
- **Redistribute:** the right to share copies of the original content, your revisions, or your remixes with others (e.g., give a copy of the content to a friend)



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://openbook.ums.edu.my/iotb/?p=26#h5p-1>

OER Myth busting

Think OER are too difficult to find or complicated to use? Worried that they will take too much time and effort to implement?

1. This material was created by David Wiley and published freely under a Creative Commons Attribution 4.0 license at:
<http://opencontent.org/blog/archives/3221>

Concerned about copyright and intellectual property protection? The OER Policy for Europe has addressed many of these concerns on their OER Mythbusting! site.

Attributions

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The 5R Framework on this page was retrieved from SFU’s Open Educational Resources research guide and is used under a CC BY 4.0 license.

JULIAN BLAKE; JANE HALSON; IAN KOLK; ANNE LENNOX; STUART MOFFAT; FRANK PONTE; REBECCA RATA; AND CARRIE THOMAS

Creative Commons licences offer creators a spectrum of choices between retaining all rights and relinquishing all rights (public domain), an approach we call “Some Rights Reserved.”¹

The video below explains how Creative Commons licences allow creators to modify copyright terms.

Creative Commons Aotearoa New Zealand (5:32 mins)



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=44#video-44-1>

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Copyright and Creative Commons

CC licences are copyright licences, and depend on the existence of copyright to work. CC licences are legal tools that creators and other rights holders can use to offer certain usage rights to the public, while reserving other rights. Those who want to make their work available to the public for limited kinds of uses while preserving their copyright may want to consider using CC licences.

1. Creative Commons. (2021). *Frequently asked questions*. <https://creativecommons.org/faq/> CC BY 4.0

Others who want to reserve all of their rights under copyright law should not use CC licences.²

Using a Creative Commons licence does not negate copyright – Creative Commons licences provide a means for a creator/author to openly licence the use of their work to the public, while recognising their exclusive rights of copyright.³

In this short video Cable Greene, Director of Open Education at Creative Commons, provides an overview of what an open licence is and the impact it has on open educational resources, locally and globally.

CableGreen explaining Creative Commons and OER in 2 minutes
(2:14 mins)

<https://youtu.be/oLcVycFkmtM>

(“Cable Green explaining Creative Commons and OER in 2 minutes” by National Digital Learning Arena is licensed under CC BY 4.0)

The six licences

There are six different Creative Commons (CC) licence combinations that are a mix of four main licence conditions, all include the primary condition of Attribution. Understanding the meaning of each condition can be useful when deciding which CC licence to use on your own work or evaluating an open resource.⁴

2. Creative Commons. (2021). *Frequently asked questions*.

<https://creativecommons.org/faq/> CC BY 4.0




3. Moist, S. (n.d). *Faculty OER toolkit*. BC Campus.


<https://pressbooks.bccampus.ca/facultyoertoolkit/> CC BY 4.0

4. Gits, C. (2020). *Texas Learn OER*. DigiTex

<https://sites.google.com/austinctc.edu/texaslearnoer/> CC BY 4.0

The licence conditions

Core conditions	Application of condition
 <p data-bbox="160 435 283 480">Attribution BY</p>	<p data-bbox="368 310 896 423">This applies to every Creative Commons work. Whenever a work is copied or redistributed under a Creative Commons licence, the original creator (and any other nominated parties) must be credited and the source linked to.</p>
 <p data-bbox="160 727 333 773">NonCommercial NC</p>	<p data-bbox="368 634 896 683">Lets others copy, distribute, display and perform the work for noncommercial purposes only.</p>
 <p data-bbox="160 1057 327 1130">No Derivative Works ND</p>	<p data-bbox="368 951 891 1024">Lets others distribute, display and perform only verbatim copies of the work. They may not adapt or change the work in any way.</p>

 <p>Share Alike SA</p>	<p>Allows others to remix, adapt and build on the work, but only if they distribute the derivative works under the same the licence terms that govern the original work.</p>
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(“About the Licences” by Creative Commons Australia is licensed under CC BY 4.0)


Combining conditions

The BY (attribution) condition is a part of all the licences, but not all of them work together. For example, the SA and ND conditions do not appear in the same licence because there is no reason to include the share-alike condition when no derivatives are being allowed. Together, the conditions form the six CC licences:⁵

Combining conditions

5. Gits, C. (2020). *Texas Learn OER*. Digitex.<https://sites.google.com/austincc.edu/texaslearnoer/module-7-creative-commons-licensing-in-depth> CC BY 4.0

Licence	Licence description
 <p data-bbox="163 337 359 360">Attribution: CC BY</p>	<p data-bbox="419 207 895 370">This licence lets others distribute, remix, adapt, and build upon your work, even commercially, as long as they credit you for the original creation. This is the most accommodating of licences offered. Recommended for maximum dissemination and use of licenced materials.</p>
 <p data-bbox="163 548 391 597">Attribution-ShareAlike: CC BY-SA</p>	<p data-bbox="419 394 895 630">This licence lets others remix, adapt, and build upon your work even for commercial purposes, as long as they credit you and licence their new creations under the identical terms. All new works based on yours will carry the same licence, so any derivatives will also allow commercial use. This is the licence used by Wikipedia, and is recommended for materials that would benefit from incorporating content from Wikipedia and similarly licenced projects.</p>
 <p data-bbox="163 768 395 816">Attribution-NoDerivs: CC BY-ND</p>	<p data-bbox="419 686 891 776">This licence lets others reuse the work for any purpose, including commercially; however, it cannot be shared with others in adapted form, and credit must be provided to you.</p>
 <p data-bbox="163 946 374 1019">Attribution-NonCommercial: CC BY-NC</p>	<p data-bbox="419 849 895 995">This licence lets others remix, adapt, and build upon your work non-commercially, and although their new works must also acknowledge you and be non-commercial, they don't have to licence their derivative works on the same terms.</p>
 <p data-bbox="163 1157 363 1247">Attribution-NonCommercial-ShareAlike: CC BY-NC-SA</p>	<p data-bbox="419 1092 895 1190">This licence lets others remix, adapt, and build upon your work non-commercially, as long as they credit you and licence their new creations under the identical terms.</p>

 <p>Attribution- NonCommercial- NoDerivs CC BY-NC-ND</p>	<p>This licence is the most restrictive of our six main licences, only allowing others to download your works and share them with others as long as they credit you, but they can't change them in any way or use them commercially.</p>
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Choosing an open licence and combining licences for your original, remixed or adapted work

Choosing an open licence for your original, remixed or adapted work

When creating a work to share, carefully consider how you want your work to be used when considering applying an open licence . As the original creator of your work, you have choices.

- Do you want to allow derivatives?
- Do you want to allow for commercial purposes?
- Do you want the same licence to be applied on derivatives?
- If this work was made using openly licensed material, are there any licence conditions you must abide?

Remember, when sharing your work, selecting and displaying the licence with it ensures the work can be adopted and adapted how you want downstream! If you don't select a licence, others must

assume the work is all rights reserved even if you intended it to be openly licenced. Creative Commons licences are designed to provide more options to the creator than copyright all-rights reserved.

The CC License chooser is a simple tool designed to help creators decide which licence is best for their work. Remember, when remixing content to create something new, if any of your adapted content includes the SA (share alike) condition – you *must* apply the SA condition to your newly remixed finished work.

Visit the CC licence chooser. With two questions, the tool will prompt you to select conditions for sharing your work. A licence icon, statement, and code to embed is generated for you to easily copy and paste into your work.⁶

Combining licences within a remixed or modified work

As you find different types of OER to reuse in an OER you are creating, you may find the need to remix and modify the content. Understanding how the different licenses can or cannot be combined is a critical step in reusing openly licensed material. The licence compatibility chart below is a great resource in determining which licences work together.⁷

Choose two works you wish to combine or remix. Find the licence of the first work on the first row and the licence on the first column. You can combine the works if there is a check mark in the cell where the row and column intersect. Use at least the most restrictive

6. Gits, C. (2020). *Texas Learn OER*. DigiTex.

<https://sites.google.com/austincc.edu/texaslearnoer/> CC BY 4.0

7. Gits, C. (2020). *Texas Learn OER*. DigiTex.

<https://sites.google.com/austincc.edu/texaslearnoer/> CC BY 4.0

licensing of the two (use the licence most to right or down state) for the new work. If there is a cross at the intersection of the row and column then you can not combine these works. This probably indicates that one of the two licences may not be used for commercial purposes, or one of the licences does not allow for derivative works to be created⁸

Licence Compatibility Chart

8. CC Wiki. (2013). *Wiki/cc license compatibility*.
https://wiki.creativecommons.org/wiki/Wiki/cc_license_compatibility CC BY 4.0

	 PUBLIC DOMAIN	 PUBLIC DOMAIN	 CC BY	 CC BY SA	 CC BY NC	 CC BY ND	 CC BY NC SA	 CC BY SA
 PUBLIC DOMAIN	✓	✓	✓	✓	✓	✗	✓	✗
 PUBLIC DOMAIN	✓	✓	✓	✓	✓	✗	✓	✗
 CC BY	✓	✓	✓	✓	✓	✗	✓	✗
 CC BY SA	✓	✓	✓	✓	✗	✗	✗	✗
 CC BY NC	✓	✓	✓	✗	✓	✗	✓	✗
 CC BY ND	✗	✗	✗	✗	✗	✗	✗	✗
 CC BY NC SA	✓	✓	✓	✗	✓	✗	✓	✗
 CC BY SA	✗	✗	✗	✗	✗	✗	✗	✗

(Adapted from “License Compatibility Chart” by Creative Commons is licensed under CC BY 4.0)

Match The Licence Game

In the exercise below match the scenario with the Creative Commons licence.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://openbook.ums.edu.my/iotb/?p=44#h5p-2>

(Adapted from *Busbee_CC_Attribution_Licenses_Ver2.doc* Kenneth Leroy Busbee under a Creative Commons Attribution License CC-BY 3.0)

Giving attribution

All six Creative Commons licences include the BY or attribution condition. This is a requirement of reuse. The original creator has explicitly informed the user of this requirement through the use of the BY condition. Providing attribution is the legal requirement of the open licence.

Attribution: Title, Author, Source, & Licence (TASL)

When creating attribution statements a good rule of thumb is to remember the acronym TASL:

- Title of the work
- Author (creator) of the work
- Source (link) or where the work can be found
- Licence of the work

For some examples, take a look at the reference list at the bottom of this section⁹

While some tools, like CC Search, include the attribution in the resource, there are other tools available to help users easily create attribution statements for work they reuse, remix, or modify.

The Open Attribution Builder – Adopted and adapted by RMIT and located on the RMIT Library website, was created by Open Washington. This tool, similar to a citation generator, builds attribution statements that can be copied and pasted into documents and websites. Note: all the attribution statements for these parts were created using this tool.¹⁰

Citation v. Attribution

Others' ideas and information provide evidence that build an argument or lay the foundation for a piece of written work. A strong work will appropriately reference these sources, showing the reader where the information and ideas originate from. This should be done for both restricted and open works through citations and attribution statements. Use this as an opportunity to show students by example how a scholar respects and shares information from other sources.

Even though they share characteristics, citations and attributions play different roles and appear in different places. This section defines citation and attribution, explains how and when they should be used in an open textbook, and discusses their purposes, similarities, and differences.

9. "Texas Learn OER" by Carrie Gits, DigiTex is licensed under CC BY 4.0
10. Gits, C. (2020). *Texas Learn OER*. DigiTex
<https://sites.google.com/austinctc.edu/texaslearnoer/> CC BY 4.0

Citation

A citation allows authors to provide the source of any quotations, ideas, and information that they include in their own work based on the copyrighted works of other authors.

Citation is a common and long-time practice among scholars used to indicate where a resource is from and who the author is. Unlike an attribution, citation is typically used for copyrighted works with restricted rights or “all rights reserved.” In other words, it is used in works for which broad permissions have not been granted.

As an academic and potential author of an open textbook, we assume that you are familiar with the rules around citation. The Referencing guide at the RMIT Library Learning lab provides some great tips and tools.

Attribution

Attribution is the cornerstone condition when using a resource or text released with an open licence. This legal requirement states that users must attribute – give credit – to the creator of the work. (See above, **The licence conditions**, Attribution BY). An attribution statement is used to provide credit to the original creator; its purpose is similar to a citation. Best practice says that the statement should include the Title, Author, Source, & Licence (TASL)

In a CC BY licence, the “CC” stands for “Creative Commons” and the “BY” stands for “Attribution,” or who the work is “by.”

BY = attribution



Creative Commons **Attribution** 4.0 International license

CC BY 4.0

“Self publishing guide” by Laurie M. Aesoph, BCcampus is licensed under CC BY 4.0)

When using text from another open educational resource, be clear in your attribution statement what section of your textbook contains this information.

Citation and attribution serve different purposes.:

- Citation is used for academic purposes in order to give credit to a colleague for their work as part of academic integrity. It's also used for legal reasons. Attributing an open work fulfils the legal requirement of the open-licence, which requires you to give credit to the creator of the work.
- Citation is used for “all rights reserved” works where the copyright holder does not share the rights of the copy with the general public. The opposite is true for cases where attribution is used.
- Citation legally protects an author who wants to refer to someone else's work and to avoid plagiarism and copyright infringement. The author of an open work has given advanced permission for others to use their work. (See the Plagiarism guide at the RMIT Library Learning Lab
- When referencing a restricted work with a citation, one must be careful about the amount referenced. Both direct

quotations and paraphrasing are permitted. All of an open work may be used with no limitations; attribution is used to give the author of this work credit.

- The closest one can come to altering a restricted work is to paraphrase the original author's ideas and expression of these ideas. Whereas the author of an open work has provided advanced permission to use AND change their work (except in cases where ND – NoDerivatives licence – has been applied).
- Citation styles are varied and established. They dictate how to cite or reference a paraphrase or quotation within text (e.g., with an in-text citation or footnote) and how and where to provide the full reference, whether it be in a reference list, a works cited, or a bibliography and the end of a book.
- The styles for attribution statements are still emerging. Current best practice for an attribution statement states it should reside on the same page (digital or printed) as the resource it refers to. Statements can stand alone, e.g., within the caption of an image, or in a list at the bottom of the page.

The following table summarizes the differences between citations and attributions.

Citation vs. Attribution

Citation	Attribution
Academic and legal purposes (plagiarism and copyright infringement).	Legal purposes (e.g., rules of Creative Commons licences).
The rights of the copy (meaning copyright) are NOT shared with the general public by the copyright holder.	Permission IS shared with the general public by the copyright holder by marking the work with an open-copyright licence.
Protects an author who wants to refer to a restricted work by another author.	Author of an open work has given advanced permissions to use their work.
Used to quote or paraphrase a limited portion of a restricted work.	Used to quote (or paraphrase) all or a portion of an openly licensed work.
Can paraphrase, but cannot change work without permission.	Author has given advanced permission to change work.
Many citation styles are available: APA, Chicago, MLA.	Attribution statement styles are still emerging, but there are some defined best practices.
A reference list of cited resources are typically placed at the end of the book.	Attribution statements are found on the same page as the resource.

(“Self publishing guide” by Laurie M. Aesoph, BCcampus is licensed under CC BY 4.0)

Similarities

There are also similarities between a citation and attribution.

Both can be, and often are, applied to copyrighted works (See section Distinguish between materials that are all rights reserved, in the public domain, and openly licensed an open licence)

Both give credit to the creator of the original work

For both restricted and open works, the author or creator of a work might be different from the copyright holder. For example, if a faculty member writes an open textbook, their institution might

hold copyright. However, it's standard practice to attribute the creator – not the copyright holder – in the attribution statement.

Both can be used for either a newly created work or a revised work

Both can be used when referring to a portion of another work, though the amount that can be cited from a fully copyrighted work is substantially less than what can be used from an open work

Both can be used when building an argument or the foundation of a textbook ¹¹Aesoph, L. M. *Self publishing guide* BCcampus. <https://opentextbc.ca/selfpublishguide/> CC BY 4.0/footnote]

SHANNON MOIST

Benefits of using OER

As can be seen in the BCOEL (formerly BCOER) infographic below, there are many reasons to use OER, including increasing student retention and providing more relevant materials for your classes.

BCOER

This poster is a creation of the BCOER, a group of BC postsecondary librarians working together to support the use of quality Open Educational Resources (OER). For more information about BCOER and its activities, go to open.bccampus.ca.


OERs CAN BE




Course Materials



Open Textbooks



Videos



Lesson Plans




Software



Games

Full courses, learning objects, tests or any other tools, materials, or techniques that support access to knowledge.

BENEFITS FOR FACULTY

-  Increases student retention by reducing costs
-  Assures academic freedom to modify or add content to your specifications
-  Extends your academic profile
-  Provides more relevant and engaging materials for your students

BENEFITS FOR STUDENTS


-  Low cost or free
-  Easy to find and access -- even before classes start
-  More customised and relevant

MUST MEET THE FOLLOWING 5Rs



- Reuse:** Content can be reused in its unaltered form
- Retain:** Users have the right to make, archive, and "own" copies of the content
- Revise:** Content can be adapted, adjusted, modified or altered
- Remix:** The original or revised content can be combined with other content to create something new
- Redistribute:** Copies of the content can be shared with others in its original, revised or remixed form

SOME FACTS



82%
Textbook costs rose 82% between 2003 and 2013

Textbook cost savings for BC students since 2012

\$352,988

4X the rate of inflation in overall consumer prices (CPI) during the same time



65% of students report NOT purchasing a textbook because of its high price

HUNDREDS of textbooks have already been adopted across Canada by faculty!



This work is licensed under a Creative Commons Attribution 4.0 International License

References

- *Open Educational Resources." Hewlett Foundation News. N.p., n.d. Web. 11 July 2014. <<http://www.hewlett.org/programs/education/open-educational-resources>>
- *Learn Learning - About OER." Learn Learning. N.p., n.d. Web. 11 July 2014. <<http://www.learnlearning.com/about-oer/>>
- *Description of chart 1 - Annual average change in the All-Items Consumer Price Index: 1993 to 2013." Government of Canada, Statistics Canada. N.p., n.d. Web. 11 July 2014. <<http://www.statcan.gc.ca/pub/44-62-0001/1407343/eng.aspx>>
- *The Affordable College Textbook Act" SPARC website. Web. 11 July 2014. <<http://www.sparc.acf.org/sites/default/files/Affordable%20College%20Textbook%20Act.pdf>>
- *Open Educational Resource: Benefits for Faculty and Students" Open Michigan. Web. 11 July 2014. <<http://open.umich.edu/sites/default/files/3658-PCF%20OER-benefits-handout.pdf>>
- *"Open Education" SPARC website. Web. 11 July 2014. <<http://www.sparc.acf.org/sites/default/files/Open%20Education%20act%20hand.pdf>>

Why Open Education matters

The following video explains why the move to Open Education (and the use of OER) is so important.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=48#oembed-1>

Why Open Education Matters from Blink Tower on Vimeo.

Faculty Perspectives on Open Textbooks

In the following two videos, you will hear from faculty who are using open textbooks and some of the reasons why.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=48#oembed-2>

Why use open textbooks? Benefits for students from BCcampus on Vimeo.



One or more interactive elements has been excluded

— from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=48#oembed-3>

What instructors say about open textbooks from BCcampus on Vimeo.

Attributions

The Faculty Perspectives on Open Textbooks section above is from the *BCcampus Open Education Adaptation Guide* by BCcampus and is used under a CC BY 4.0 international license. Download this book for free at <http://open.bccampus.ca>.

Exercises

Read the journal article *OER Mainstreaming in Cameroon: Perceptions and Barriers* [opens in new tab] and post your reflections on the following questions.

- Explore possibilities of mainstreaming OER under the Ministries of Higher Education, Malaysia
- How can you lower the textbook costs in Malaysia.

JULIAN BLAKE; JANE HALSON; IAN KOLK; ANNE LENNOX; STUART MOFFAT; FRANK PONTE; REBECCA RATA; AND CARRIE THOMAS

An overview of accessibility

As instructors, we have legal and ethical obligations to ensure our courses are fully accessible to all learners, including those with disabilities. We use digital resources in our courses because we believe they enhance learning. However, unless carefully chosen with **accessibility** in mind, these resources can have the opposite effect for students with disabilities, erecting daunting barriers that make learning difficult or impossible.¹

Accessibility and universal design

The Web Content Accessibility Guidelines (WCAG) 2.0, developed by the World Wide Web Consortium, provide an international standard that defines accessibility of web-based resources. The principles of WCAG 2.0 are applicable to other digital assets as well, including software, video, and digital documents.²

Maintenance of accessibility with creation of online resources is guided by the RMIT Digital Accessibility Framework.³

1. Open Washington. (2018). *Module 9: Accessibility*.
<https://www.openwa.org/module-9/> is licensed under CC BY 4.0
2. W3C. (2008). *Web Content Accessibility Guidelines (WCAG) 2.0*.
<https://www.w3.org/TR/WCAG20/>
3. RMIT University. (2021). *Digital Accessibility*.

A full range of resources to assist accessibility can be found here: RMIT College of Business and Law Learning and Teaching hub.⁴

Choosing accessible video, images, textbooks and course material

Choosing and using accessible video

When selecting video, be sure to choose videos that include closed captioning. Closed captions provide a text version of the spoken audio and other critical sounds, displayed in sync with the video.

Closed captions make video accessible to students who are deaf or hard of hearing, but also benefit many others, such as second-language students.

YouTube automatically captions most videos that are uploaded to its website. However, automatic captions, which are created by a computer, are not accurate enough to be relied upon (consider the effect of one missed “not” on the meaning of the video).

<https://www.rmit.edu.au/staff/our-rmit/diversity-and-inclusion/accessibility/digital-accessibility>

4. College of Business and Law. (2021). *L & T Toolbox: Supporting*. <http://www.learningandteachinghub.com/supporting/> is licensed under CC BY 4.0

Consult the following resources for additional information on finding videos that have captions:

Searching YouTube for videos with captions⁵

Turning YouTube captions on and off⁶

If you find an open-licensed video that is perfect for your course but does not currently have captions, or you need to edit the captions, here's how:

YouTube: How to contribute subtitles and closed captions⁷

Remember, supplying captions is not sufficient for full accessibility. Always include a written transcript as well, for those unable to access the video.

Choosing and using accessible images

If images are used to communicate information, they should include short text descriptions for individuals who are unable to see the

5. YouTube help. (2021). *Search for videos with captions.*

<https://support.google.com/youtube/answer/3029103?hl=en>

6. YouTube help. (2021). *Manage subtitle settings.*

<https://support.google.com/youtube/answer/100078?hl=en>

7. YouTube help. (2021). *Add subtitles and captions.*

https://support.google.com/youtube/answer/2734796?hl=en&visit_id=637685705238440705-4018161768&rd=1

images. These short descriptions are typically referred to as “alternate text” or “alt text.”

Most authoring tools that support adding images to content also support adding alt text to an image. When you’re adding an image to a web page or document, simply look for an “alt text” field in the Image Properties dialog and enter a short description into the space provided.

The **alt text** that you enter for a particular image depends on the context. Think about what you’re wanting to communicate by adding the image. Then, add alt text that will communicate the same idea to someone who is unable to see the image. The video below provides some hints on how to add alt text.

Inclusive Learning: Alt Tags (0:34 mins)



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=51#oembed-1>

(“Inclusive Learning: Alt Tags” by ADGProduction COB is licensed under CC BY 4.0)

Choosing and using accessible course material

When choosing among the wide variety of course materials, be sure to consider whether these materials present challenges or barriers for students with disabilities. Ask specific questions, such as:

- Is all written content presented as text, so students using assistive technologies can read it?
- If the materials include images, is the important information

from the images adequately communicated with accompanying alt text?

- If the materials include audio or video content, is it captioned and transcribed? More information on captions is available on video below.

Inclusive Learning: Captions (1:09 mins)



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=51#oembed-2>

(“Inclusive Learning: Captions” by ADGProduction COB is licensed under CC BY 4.0)

- If the materials have a clear visual structure including headings, subheadings, lists, and tables, is this structure properly coded so it’s accessible to blind students using screen readers? Reasons for using tagged headings are included in the following video.

Inclusive Learning: Tagged Headings (0:35 mins)



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=51#oembed-3>

(“Inclusive Learning: Tagged Headings” by ADGProduction COB is licensed under CC BY 4.0)

- If the materials include buttons, controls, drag-and-drop, or other interactive features that are operable with a mouse, can they also be operated with keyboard alone for students who are physically unable to use a mouse?
- Do the materials avoid communicating information using colour alone e.g. the red line means X, the green line means Y?

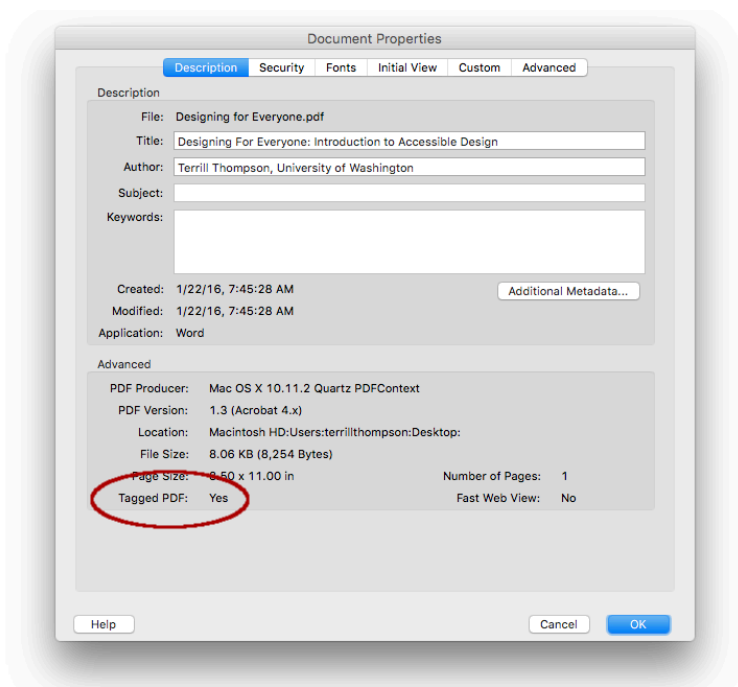
Choosing and using accessible textbooks

Most downloadable textbooks are available in PDF format. PDF, like most other document formats, includes support for accessibility features such as headings, subheadings, lists, and alt text on images, but the author and/or publisher must make a conscious effort to include these features.

In order to support **accessibility** features, a PDF file must be tagged. A tagged PDF is a type of PDF that includes an underlying tagged structure that enables headings to be identified as headings, lists as lists, images as images with alt text, etc. Tags provide the foundation on which accessibility can be built. To determine whether a particular PDF is tagged, open it in Adobe Acrobat or Adobe Reader and go to Document Properties (Ctrl + D in Windows; Command + D in Mac). In the Document Properties dialog, “Tagged” is either “Yes” or “No” as shown in the image below.⁸

8. Open Washington. (2018). *Module 9: Accessibility*.

<https://www.openwa.org/module-9/> is licensed under CC BY 4.0



(Document Properties in PDF by Open Washington is licensed under CC BY 4.0)

Accessibility Quiz

Check your knowledge with this three-question quiz.



An interactive H5P element has been excluded from this version of the text. You can view it online here:

<https://openbook.ums.edu.my/iotb/?p=51#h5p-3>

One of the most appealing aspects of the Creative Commons licences is that many of them permit adaptations. As opposed to just being available for free, many CC-licensed works encourage you to make changes to them for your own purposes.

We talked about how to select a licence for your original open work in Anatomy of a CC Licence, but licensing an adapted work can be more complicated. One of the trickiest parts is figuring out if your work is a **collection** or an **adaptation**.

Collections

A **collection** is a grouping together of discrete works into one work such that each component work is distinguishable from one another. Examples of collections include:

- An anthology of short stories
- A series of photos
- A music album
- A book of sheet music containing a dozen pieces

Licensing Considerations

If you selected 15 openly licensed songs, downloaded the audio files for them, arranged them in a particular order in one big file, then released this file to the world, you would have a collection that you could openly license. This licence would apply to the particular order of the songs, and if you released physical versions of the album as CDs and designed original cover art for the CD cases,

you could also license the cover art. But you would not own the copyright to or be able to change the licence for any of the individual songs on the CD: the original Creative Commons licence applied to each song would still be in effect, and the copyright would still belong to the licensor. You would also need to comply with the terms of each song's licence and provide attribution for each copyright owner.

All Creative Commons licences permit works to be incorporated into collections. That's right: because a collection does not count as a derivative work, you may even include in your collection a work carrying a CC BY-ND or CC BY-NC-ND licence. The NoDerivatives element of the licence means that modified versions of the work may not be shared, but reproducing the work in whole is completely legal, so you may add an ND work to a collection.

Collection Example

I created a collection called *All You Need to Know about Writing*, an open text that contains chapters from several different open textbooks. The copyright statement on the home page says:

All You Need to Know about Writing by Arianna Cheveldave is licensed under a CC BY 4.0 licence, except where otherwise noted. It contains content from other openly licensed works, whose authors are clearly indicated in the applicable chapters.

At the beginning of each chapter is a statement like the following:

“Expository Essays” by Tara Horkoff is licensed under a Creative Commons Attribution–NonCommercial–ShareAlike 4.0 International licence (CC BY-NC-SA 4.0). It was originally published in *Writing for Success – 1st Canadian H5P Edition*.

Each chapter is imported from another open textbook in Pressbooks. This platform makes it very easy to import open content as well as licensing information from other books. If you look at the beginning of any chapter, you'll see that the chapter author is named directly below the chapter title. At the end of each chapter is a copyright statement that indicates the chapter's specific licence.

For more information about how to import a web page or Pressbooks webbook to your own Pressbooks webbook, see the *Pressbooks Guide* by BCcampus.

Adaptations

An **adaptation** (also called a remix, adapted work, or derivative work) is a work that is based on another work but has had sufficient original thought and creativity put into it that it qualifies as a separate work. Unlike in a collection, the component parts of an adaptation are blended together such that you cannot tell where a component from one work ends and another begins.

You are probably familiar with the concept of a film adaptation of a book. In such a case, whoever owns the right to adapt the book for film (probably either the author or the publisher) has sold or licensed that right to a movie studio or producer. For works with closed copyrights, you usually cannot adapt the work without licensing or purchasing this right.

Examples of how you might adapt a work include:

- Translating a work
- Adapting the work for a different medium, such as book to film or film to play
- Modifying the work by adding or removing content

Licensing Considerations

















Of the six Creative Commons licences, four permit anyone to adapt a work and share their adaptation with anyone. (For more information about the two licences that don't allow this, see ND in Anatomy of a CC Licence.) If you are thinking about adapting an openly licensed work, first check the terms of the licence. Are you permitted to share adaptations of this work? Do you *want* to share adaptations of this work, or do you just want to adapt a copy for your own private use?

Once you have cleared the first hurdle of understanding the terms of the open licence attached to the original work, you may embark on the task of adapting the work. For some, doing the actual adapting might look like the easy part, compared to figuring out what licence to apply once the work is done!

Licence Compatibility

When you're adapting a work, you may choose to make changes to one single work and add your original contributions to it. However, you may also choose to combine elements from two or more different works, plus or minus your own contributions. This scenario is more complicated than adapting a single work, as you have to consider licence compatibility and what licence you are allowed to apply as an adapter.

The Creative Commons FAQ “Can I combine material under different Creative Commons licenses in my work?” covers this issue in detail. It contains a handy chart for understanding what licences are compatible when remixing works, seen below:

	 PUBLIC DOMAIN	 PUBLIC DOMAIN	 CC BY	 CC BY SA	 CC BY NC	 CC BY NC ND	 CC BY NC SA	 CC BY NC ND
 PUBLIC DOMAIN	✓	✓	✓	✓	✓	✗	✓	✗
 PUBLIC DOMAIN	✓	✓	✓	✓	✓	✗	✓	✗
 CC BY	✓	✓	✓	✓	✓	✗	✓	✗
 CC BY SA	✓	✓	✓	✓	✗	✗	✗	✗
 CC BY NC	✓	✓	✓	✗	✓	✗	✓	✗
 CC BY NC ND	✗	✗	✗	✗	✗	✗	✗	✗
 CC BY NC SA	✓	✓	✓	✗	✓	✗	✓	✗
 CC BY NC ND	✗	✗	✗	✗	✗	✗	✗	✗

“CC Licence Compatibility Chart” by Creative Commons is licensed under a Creative Commons Attribution 4.0 International licence (CC BY 4.0).

To determine if two works may be mixed together, look for the licence of the first work on the left-hand side of the chart. Then, find the second work in the top row of the chart. Look at where the two licences intersect on the chart. If there is a green checkmark where they meet, the two works may be remixed. If there is a black X, the two works may not be remixed, as their licences are incompatible.

Some important takeaways from this chart:

- Both the CC BY-ND and CC BY-NC-ND licences forbid publicly adapting works, so these licences are not eligible for remixing with anything.
- The CC BY-SA licence only allows remixing with CC BY, CC BY-SA, and public domain works. This is because the SA element requires derivative works to be shared under the same licence as the original work, and the restrictions placed on other licences are not compatible with this requirement.
- The CC BY-NC-SA licence allows remixing with CC BY, CC BY-

NC, CC BY-NC-SA, and public domain works. This makes the CC BY-NC-SA licence slightly more remixable than the CC BY-SA licence (perhaps counterintuitively).

- CC BY and public domain works may be remixed with any works whose licences permit remixing (that is, all but the ND licences).
- Both the CC BY-NC and CC BY-NC-SA licences may be remixed with CC BY, CC BY-NC, CC BY-NC-SA, and public domain works.

Adapter’s Licence

Once you have determined that the work or works you want to adapt may be adapted and may be combined together, you may make your changes. (Easier said than done, of course!)

After changes have been made, it’s time to pick your adapter’s licence. The Creative Commons FAQ “If I derive or adapt material offered under a Creative Commons license, which CC license(s) can I use?” provides useful guidance on this topic, including another helpful chart, seen below.

Adapter’s licence chart		Adapter’s licence						
		BY	BY-NC	BY-NC-ND	BY-NC-SA	BY-ND	BY-SA	PD
Status of original work	PD	Green	Green	Green	Green	Green	Green	Green
	BY	Green	Green	Green	Green	Green	Green	Yellow
	BY-NC	Yellow	Green	Green	Green	Yellow	Yellow	Yellow
	BY-NC-ND	Grey	Grey	Grey	Green	Grey	Grey	Grey
	BY-NC-SA	Grey	Grey	Grey	Green	Grey	Grey	Grey
	BY-ND	Grey	Grey	Grey	Grey	Green	Grey	Grey
	BY-SA	Grey	Grey	Grey	Grey	Grey	Green	Grey

“Adapter’s Licence Chart” by Creative Commons is licensed under a Creative Commons Attribution 4.0 International licence (CC BY 4.0).

To determine what licence you should apply to your adaptation,

look for the original work's licence on the left-hand side. Then, look along the licence's row to see what adapting licences are permitted. Green boxes indicate that a licence is perfectly permissible, whereas yellow boxes mark those adapting licences that are technically allowed but are not recommended by Creative Commons, for ease of use by downstream users.

Some key takeaways from this chart:

- You may apply any Creative Commons licence to an adapted version of a public domain work.
- You may safely apply any Creative Commons licence to an adaptation of a CC BY work.
- It is recommended that you apply only other NC licences to CC BY-NC works. Otherwise, you are faced with complicated copyright statements that must indicate to potential users that multiple copyrights are at play and not all elements of the work may be used for commercial purposes.
- You may not (publicly) adapt CC BY-ND or CC BY-NC-ND works, so there is no need for adapter's licences.
- Only a CC BY-NC-SA licence may be applied to an adaptation of a CC BY-NC-SA work, as the adaptation must be shared alike to the original.
- Only a CC BY-SA licence may be applied to an adaptation of a CC BY-SA work, as the adaptation must be shared alike to the original.

There are a multitude of OER out there to choose from, including textbooks, courses, multimedia, data, and supplementary materials. These can be found by searching regular search engines (like Google) by using certain keywords but it is much easier to find them through dedicated OER repositories or websites. The examples below are just a sampling of such repositories and websites.

Repositories

- SOL*R (Shareable Online Learning Resources): This is BCcampus' OER repository.
- Creative Commons Search: A repository of various types of media, including images, music, and videos.
- OER Commons: A large collection of a variety of types of OER, including textbooks, courses, and ancillary materials.
- MERLOT: “a curated collection of free and open online teaching, learning, and faculty development services contributed and used by an international education community.”
- OER Handbook for Educators: “a guide for those who are just getting started in the creation of open educational resources (OER).”

Textbooks

- Pressbooks Directory is a free, searchable catalog that includes **5,888** open access books published by **161** organizations and networks using Pressbooks. It's easy to copy, revise, remix, and redistribute any openly licensed content found here using

Pressbooks' publishing platform. Nearly all books are highly accessible, and many include interactive H5P learning activities to engage learners.

- BCcampus's BC OpenEd Resources page is a good place to start to find both general information about OER and a collection of textbooks that have been “created ... or ... re-created from existing [OER] by B.C. post-secondary faculty, reviewed by B.C. faculty and made available under a Creative Commons license.”
- OpenStax: Supported by Rice University, OpenStax has a huge collection of open, peer-reviewed textbooks on a large variety of subjects.
- Project Gutenberg: A collection of tens of thousands of digitized books available for download; audiobooks are also available.
- AU Press: Athabasca University's AU Press publishes open access journals and books with a focus on Canada, the North American West, and the Circumpolar North.

Courses

- Khan Academy: A collection of instructional videos and practice exercises on topics including math, science, programming, history, English, economics, and standardized test prep.
- MIT OpenCourseWare: offers free access to almost all MIT course content
- Saylor Academy: a non-profit organization committed to providing free and open online courses
- Coursera: an educational platform partnered with dozens of prestigious universities and institutions (including MoMA, Stanford, Yale, the University of Toronto, and the University of London)

Multimedia

- Creative Commons Search: A repository of various types of media, including images, music, and videos
- Vimeo: Videos with a CC license can be found through Advanced Search options
- Flickr: Creative Commons: Flickr is an “online photo management and sharing application” and many photos are available under CC licenses; Flickr allows searching by type of license.

Supplemental materials

Supplemental, or ancillary, OER materials can include lecture notes, lesson plans, PowerPoint presentations, assignments, and activities.

- PhET: Interactive math and science simulations with lesson plans and activities
- OER Commons: A large collection of a variety of types of OER, including textbooks, courses, and ancillary materials

Other OER lists

Many universities have research guides related to finding OER and that provide lists of various repositories and resources, so be sure to check your home institution.

- Simon Fraser University guide called “Finding and evaluating OER: Open Educational Resources”
- University of British Columbia research guide to open education

- Kwantlen Polytechnic University research guide to open educational resources
- British Columbia Institute of Technology guide to open education
- University of Victoria open educational resources site
- University of Northern British Columbia guide to open access in scholarly communication

JULIAN BLAKE; JANE HALSON; IAN KOLK; ANNE LENNOX; STUART MOFFAT; FRANK PONTE; REBECCA RATA; AND CARRIE THOMAS

Adaptation

The term adaptation is commonly used to describe the process of making changes to an existing work. We can also replace “adapt” with revise, modify, alter, customise, remix, or other synonyms that describe the act of making a change.

When it comes to working with **open textbooks** (and open educational resources in general), one of the conceptual hurdles faced by most people is around the notion of adapting or changing someone’s work. What exactly can be adapted within the scope of an open resource? Won’t the original author get upset if you change their work?

Changing someone’s work can feel uncomfortable. But rest assured, if the author has released their work under a Creative Commons licence that allows for adaptation (which is any Creative Commons licence except the No Derivatives (ND)¹ licence), then they expect that you will change the content, providing you give them the proper attribution. Using information and media from an open textbook or other open educational resource is not considered plagiarism.

Adaptation of an OER is possible where the copyright holder has already granted permission by releasing their work using certain open – or **Creative Commons**—licences as outlined in chapter 2.

1. Creative Commons. (n.d.). *Attribution-NoDerivatives 4.0 international*. <https://creativecommons.org/licenses/by-nd/4.0/legalcode> CC BY 4.0

Determine reasons for adapting an OER

When you use an openly licenced textbook or other open educational resource, you are free to adapt it to fit your learners' needs. In other words, you can adjust the resource to fit your course curriculum, not the other way round. Other reasons for revising an existing open work might be to:

- Address a particular teaching style or learning style
- Adjust for a different course or program
- Adapt for a different discipline
- Accommodate a different learning environment
- Address diversity needs
- Meet a cultural preference
- Meet a regional or national preference
- Make the material more accessible for people with disabilities
- Add material contributed by students or material suggested by students
- Translate the material into another language
- Correct errors or inaccuracies
- Update the book with current information
- Add more media or links to other resources
- Use only a portion of the book for a course²

When you have decided to adapt an OER, you need to make sure it is suitable for your needs. Here are a few steps you might take when evaluating an OER. If this process seems lengthy, think about the

2. BCcampus. (2021). *Reasons to adapt an open textbook*.
<https://opentextbc.ca/adaptopentextbook/chapter/reasons-adapt/> CC BY 4.0

process you follow to review textbooks and other materials in your course. You can use a similar or modified evaluation process.

1. The content under consideration covers the subject area appropriately
2. The content of the OER is accurate and free of major errors and spelling mistakes
3. An understanding of Creative Commons licence types will determine how content can be used or altered for course needs
4. The OER is clearly written and appropriate for the students' level of understanding
5. The accessibility of the content is appropriate for all students³

See Evaluating the quality of OER for more information and rubrics.

Adapting an OER with correct attribution and licencing

Adapting an OER can allow for a wide range of possibilities as the number, variety, and quality of OER available is such that any educator should be able to find resources they can readily (with or without modification) use within their classroom. Adapting existing

3. Elder, A. (2022). *Evaluate OER*. <https://instr.iastate.libguides.com/oer/evaluate> CC BY 4.0

OER will almost always be more efficient than creating teaching materials from scratch.⁴

What can you change?

Anything and everything in an open textbook or resource can be changed if the conditions of the open licence are met.⁵ There are many resources including this work that can help you adapt an existing OER. Always ensure you check the licence on a resource before you start adapting it. Outlined below are some points covering **attribution** and licencing to consider when looking to adapt an open resource.

Licences and permissions

Works online are often protected by **copyright**, but you can potentially adapt, modify, and reuse existing online content by looking out for Creative Commons licensed material.

Works that fall within the **public domain** can also be adopted and reused without infringing copyright. See Distinguish Between Materials That Are All Rights Reserved In The Public Domain And Openly Licensed.

If you want to use materials that are not released under a Creative Commons licence or in the public domain, then you can try

4. Moist, S. (2017). *Adopt/adapt vs creation*.

<https://pressbooks.bccampus.ca/facultyoertoolkit/chapter/adopt-adapt-vs-creation/> CC BY 4.0

5. Aesoph, L. M. (2016). *Adaptation guide*. <https://opentextbc.ca/adaptopentextbook/chapter/permission-to-adapt/> CC BY 4.0

obtaining written permission from the copyright holder to use the material in your resource; be mindful that copyright holders may not approve the re-licensing of their works under a Creative Commons licence, or they may charge for the use.

Written permission can be as simple as an email from the copyright owner confirming that you are allowed to use the material in the way you intend. When seeking permission, you need to make it clear that your resulting work will be licensed under a Creative Commons licence, you also need to ensure you provide the original copyright holder all necessary information to make an informed decision in granting permission. This would normally include how you intend to use the work, any changes or adaptations you intend to make, and the terms of the Creative Commons licence you will licence your work under.⁶

If permission is granted by a third party to use their material in your OER, but not licence their contribution as Creative Commons, you will need to ensure that it is clearly marked and it has been included with the permission of the rightsholder. The content should be labelled as **“Reproduced with Permission”** with the rightsholder’s preferred attribution style included. This will assist users downstream who wish to adapt your work by making it clear that the material in question is NOT Creative Commons.

There are many different places where you can search for openly

6. Smartcopying. (2021). *Permissions*. <https://smartcopying.edu.au/guidelines/permissions-and-consents/permissions/> CC BY 4.0

licensed material ⁷ including open images to use in your OER. Additionally, Google images allows you to filter results by Creative Commons licence if you select Tools > Usage Rights. When gathering images, keep track of attribution information to make creating front and back matter ⁸ pages easier. Also, make sure that any images conform to accessibility guidelines.

See Accessibility for more information.

When searching for videos, you can identify Creative Commons content by using filters. For example, you can filter your YouTube search to include videos with a Creative Commons licence or search within specific open educational resource repositories. Before using a video, you need to review the content for potential infringement – refer to the Australian Copyright Council’s guidelines on Video Uploads & Copyright.⁹

7. RMIT University Library. (2021). *Copyright guide*. https://rmit.libguides.com/copyright/free_stuff
8. University of British Columbia. (2021). *Documentation: Open textbook publishing guide/textbook outline*. https://wiki.ubc.ca/Documentation:Open_Textbook_Publishing_Guide/Textbook_Outline
9. Australian Copyright Council. (2019). *Video uploads & copyright: YouTube, Vimeo, Facebook etc*. <https://www.copyright.org.au/browse/book/ACC-Video-Uploads-&-Copyright:-YouTube,-Vimeo,-Facebook-etc.-INFO117>

Creative Commons Licenses

Given below are the Creative Commons Licenses and their abbreviations.

Table 2.1: Creative Commons Licenses and Abbreviations

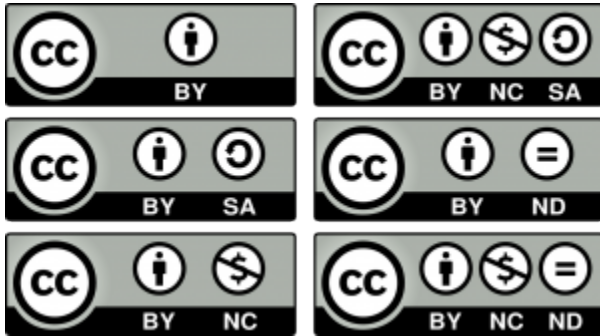
Creative Commons License	Abbreviation
Attribution	CC BY
Share Alike	CC BY-SA
Non-commercial	CC BY-NC
NoDeriv	CC BY-NC-ND
Non-commercial Share Alike	CC BY-NC-SA
Non-commercial NoDeriv	CC BY-NC-ND

Choose a license

If you are adapting an existing open textbook, the adaptations you make will be released with whatever open licence you choose, while the rest of the book will be released under the licence of the original book. In other words, you need to respect the licence of the original work. You cannot license what you do not create. You can only attach a CC BY (Creative Commons Attribution) or other open licence to the parts of the book that you have created and that are new.

However, there is a “catch.” If the textbook you are adapting has a **ShareAlike** condition (CC BY-SA 4.0) stipulated, then you must release the entire book using the same licence as the original book.

Below are the symbols and definitions of each of the Creative Commons licences. If you are unsure which CC licence you would like to use, you can use the Creative Commons *Choose a License* tool.



Attribution: CC BY



This license lets others distribute, remix, tweak, and build upon your work, even commercially, as long as they credit you for the original creation. This is the most accommodating of licenses offered. Recommended for maximum dissemination and use of licensed materials.

Attribution-ShareAlike: CC BY-SA



This license lets others remix, tweak, and build upon your work even

for commercial purposes, as long as they credit you and license their new creations under the identical terms. This license is often compared to “copyleft” free and open source software licenses. All new works based on yours will carry the same license, so any derivatives will also allow commercial use. This is the license used by Wikipedia, and is recommended for materials that would benefit from incorporating content from Wikipedia and similarly licensed projects.

Attribution-NoDerivs: CC BY-ND



This license allows for redistribution, commercial and non-commercial, as long as it is passed along unchanged and in whole, with credit to you.

Attribution-NonCommercial: CC BY-NC



This license lets others remix, tweak, and build upon your work non-commercially, and although their new works must also acknowledge you and be non-commercial, they don't have to license their derivative works on the same terms.

Attribution-NonCommercial-ShareAlike: CC



This license lets others remix, tweak, and build upon your work non-commercially, as long as they credit you and license their new creations under the identical terms.

Attribution-NonCommercial-NoDerivs: CC



This license is the most restrictive of our six main licenses, only allowing others to download your works and share them with others as long as they credit you, but they can't change them in any way or use them commercially.

Attributions

The Creative Commons license definitions and images listed on this page have been copied from Creative Commons and are used under a CC BY 4.0 license.

One of the benefits of using an openly licensed textbook or other educational resource is that you are free to adapt it to fit your needs. In other words, you can adjust the educational resources to fit your course curriculum, not the other way around. Other reasons for revising an existing open work might be to:

Last update:
Sep 13/22

1. Address a particular teaching style or learning style
2. Adjust for a different grade or course level
3. Adapt for a different discipline
4. Accommodate a different learning environment
5. Address diversity needs
6. Meet a cultural preference
7. Meet a regional or national preference
8. Address a school, district, or institution's standardized curriculum
9. Make the material more accessible for people with disabilities
10. Add material contributed by students or material suggested by students
11. Translate the material into another language
12. Correct errors or inaccuracies
13. Update the book with current information
14. Add more media or links to other resources
15. Use only a portion of the book for a course¹

1. Some of this material is based on: WikiEducator. "Adapt" in OER Handbook for Educators (http://wikieducator.org/OER_Handbook/educator_version_one/Adapt) and Why Remix

https://rmit.pressbooks.pub/oercapabilitytoolkit/wp-admin/admin-ajax.php?action=h5p_embed&id=8

Open Educational Resources? created by Liam Green-Hughes, both used under a CC-BY licence

A good rule of thumb when creating an adapted textbook is to keep it simple, especially if you are approaching a remix project for the first time. While it may be tempting to make a number of major changes to a textbook before releasing it to your students, think of the textbook as a living resource that you can improve incrementally over time.

Last update:
Sep 13/22

Here are three steps to consider before adapting an existing textbook.

Step 1: Check the licence

First, check the licence to make sure you have the permission to modify the contents. As long as the Creative Commons licence does not have a No Derivative (ND) attribute, you are able to change the contents of the book. See Creative Commons for more information on licences.

Step 2: Check the file format

If you want to adapt an open textbook, you will need it in a workable technical format, i.e. an editable file type. These include:

- Pressbooks or WordPress files (.xml or .wxr)
- HTML files (webpages)
- Word document (.docx) or OpenDocument Text (.odt)

- Simple text files (.txt)
- EPUB (see “Export Google Docs files as EPUB publications“)
- LaTeX files (if the original book includes math or science formulas and equations)

Avoid PDF documents

Many open textbooks are only available as a PDF document, which are not editable. If you want to adapt an open textbook that is only available in PDF format, you will need to convert the PDF document to one of the editable formats listed above.

Converting a PDF document to an editable format is a difficult, time consuming, and imprecise process. Before taking the time to do this, consider contacting the author and asking for a copy of the textbook’s source files.

Step 3: Use editing tools

Once you have an editable file, you are ready to begin your adaptation. The tools you use to create your adaptation will depend on the source file of the original textbook and how comfortable you feel working with the format and tool.

Pressbooks

Pressbooks is a commonly used publishing and editing tool. You can import a number of different formats into Pressbooks for editing including.

For more information, see Export Files in the
Pressbooks Guide.

Last update:
Sep 15/21

Open Oregon Educational Resources has developed three checklists—each designed for a specific user type—to evaluate individual course materials such as open textbooks.

- Faculty Checklist for Evaluating Course Materials
- Administrator Checklist for Evaluating Course Materials
- Student Checklist for Evaluating Course Materials

Evaluate OER collections

British Columbia Open Education Librarians (BCOEL) have developed a useful guide to assist faculty, librarians, educational technologists, and students or anyone else to evaluate the quality of OER collections.

By evaluating the following criteria, you can assess an open educational resource repository to identify opportunities to improve the open resources available to your institution:

- Authority
- Audience
- Access and Diversity
- User-friendliness
- Subject Coverage
- Search Functional and Browsing
- Media Type
- Licensing and Permissions

Assess an OER collection with the Open Education Resource Repository Rubric with the open textbook and OER evaluation process.

Why adaptation or adoption?

Many educators feel driven to create the “perfect” resources for their classes and it can be difficult put aside that perfection and use other people’s creations. However, the number, variety, and quality of OER available freely is such that any educator should be able to find resources they can readily (with or without adaptations) put to use within their classrooms. And adaptation or adoption of OER will almost always be more efficient than creating teaching materials from scratch.

Jan M. Pawlowski addressed one of the reasons behind this reluctance in his article, Emotional Ownership as the Key to OER Adoption.

More resources

For more complete information about and instructions on how to adapt an open textbook, please visit the BCcampus Open Education Adaptation Guide.

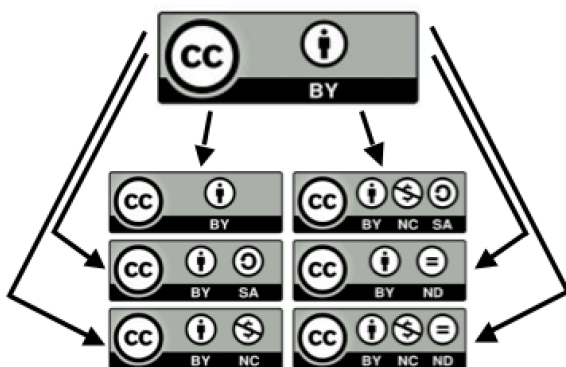
For more complete information about and instruction on how to adopt an open textbook, please visit the BCcampus Open Education Adoption Guide.

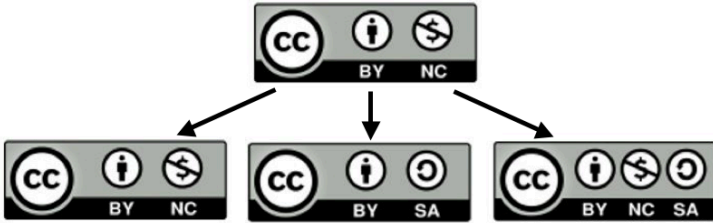
For a list of open textbooks that have been evaluated and are available for adoption and adaptation, please visit BCcampus OpenEd.

Combining CC licenses

When adapting an open textbook (or other OER), you may want to incorporate other people’s works into your adaptation. In order to do that, you must ensure that any existing licences on the work you’re adapting or including are compatible with each other.

For example, as explained in the chapter on Creative Commons licensing, the CC BY licence is the least restrictive and is compatible with all of the other CC licences. However, if you want to include a work that has a CC BY-SA licence, you must use that same licence with your adaptation (which may conflict with other licences already attached to the work). Creative Commons provides more information about CC BY-SA licence compatibility.





The Orange Grove repository's video below further explains how CC licenses can be combined.

<https://youtube.com/watch?v=Hkz4q2yuQU8%3Fecver%3D2>

For further help, you can use the use the Creative Commons Choose a License tool or the Wiki/cc license compatibility chart, or contact your institution's Library or Teaching & Learning Centre.

Attribution

The Creative Commons licence definitions and images listed on this page have been copied from Creative Commons and are used under a CC BY 4.0 licence.

SHANNON MOIST

The information in this chapter refers to adopting an open textbook but any OER (assignments, videos, lecture notes, diagrams, etc.) can be adopted for classroom use (using many of the steps below).

For more complete information about and instruction on how to adopt an open textbook, please visit the BCcampus Open Education Adoption Guide.

Adopt an open textbook

If you are an instructor looking for an open textbook to assign to your class, here are some suggested ways to go about using a textbook from the B.C. Open Collection.

First, we often get questions from people outside of British Columbia about whether or not they can use textbooks in our collection. The answer is yes. You don't have to be from British Columbia to use our open textbooks. Open textbooks are not geographically limited. Anyone from Canada, the United States, or any other country in the world can use these resources.

Using an open textbook for your class

1. **Find the right textbook.** Search the B.C. Open Collection.
2. **Review and evaluate** to see if it matches your criteria and based on content, presentation, online accessibility, production options, platform compatibility, delivery options, interactivity, consistency between online and printed versions, and available ancillary material (test banks, PowerPoints, etc.). A suggested source for evaluating an OER is the Faculty Guide

for Evaluating Open Education Resources [PDF].

3. **Decide if you want to use as is or modify it.** One of the benefits of open textbooks is flexibility to modify and customize them for specific course designs as much or as little as you desire. If you want to make edits or append content, make sure the Creative Commons license allows for that (every CC license except the non-derivative license allows for modifications). If you are interested in modifying an open textbook, check out our section on how to modify an open textbook.
4. **Distribute to your students.** There are a number of ways in which you can do this.
 - If you're using a textbook from this site, provide the link to the textbook to your students. They will have the option to select which file type they would like to download, or they can purchase a low cost printed version from the BCcampus print on demand service.
 - Alternatively, you can download copies of the book and put them on another site. Some examples of where you could put your own copies of the book files are:
 - Your institutional LMS (Learning Management System). Load the book files into your Moodle, Desire2Learn, Blackboard or Canvas site and make the books available to your students via the LMS.
 - Use an online file sharing service like Dropbox or Google Docs. Upload a copy of the book files to Dropbox or Google Docs and send your student the link to that copy.
 - If you have a faculty website, put copies of the files on that website and send students to your website to download your copy of the textbook.
 - Approach your local institutional bookstore or print shop to see if they can make printed copies of the books available for your students. Many institutional print shops

can create low cost printed versions of textbooks and make them available to students. Keep in mind that textbooks that have a specific non-commercial clause (CC BY-NC) cannot be sold with a markup or at a profit. However, charging a modest cost-recovery fee for physical textbooks is considered reasonable.

5. **Let us know.** If you adopt an open textbook from this site, tell us about it by filling out an open textbook adoption form. Faculty adoption information is important to the long-term viability of the open textbook project. Plus we will add you to a mailing list to inform you of when the textbook is being modified or additional resources are available for it.

Attribution

This chapter contains material from the *BCcampus Open Education Adoption Guide* by BCcampus is used under a CC BY 4.0 International license. Download this book for free from <http://open.bccampus.ca>.

SHANNON MOIST

For more complete information about and instructions on how to adapt an open textbook, please visit the BCcampus Open Education Adaptation Guide.

Adaptation

The term “adaptation” is commonly used to describe the process of making changes to an existing work. Though we can also replace “adapt” with revise, modify, alter, customize, or other synonym that describes the act of making a change. The example below refers to adapting an open textbook but any OER (assignments, videos, lecture notes, diagrams, etc) can be adapted.

In addition to cost savings to students, one of the biggest advantages of choosing an open textbook is it gives faculty the legal right to add to, adapt, or delete the content of the textbook to fit their specific course without obtaining permission from the copyright holder. This is possible because the copyright holder has already granted permission by releasing their work using an open – or Creative Commons – licence. This type of licence gives users permission to use and reuse, share, copy, retain and modify the textbook without consulting the author.

Below are some examples of how an open textbook can be adapted by adding in your own Learning Objectives, Exercises, and Key Takeaways.



Learning Objectives

Type your learning objectives here.

- First
- Second

Exercises

Type your exercises here.

- First
- Second

Key Takeaways

Type your key takeaways here.

- First
- Second

Reasons to adapt an open textbook

One of the benefits of using an openly licensed textbook or other educational resource is that you are free to adapt it to fit your needs. In other words, you can adjust the educational resources to fit your course curriculum, not the other way around.

Below are 10 more reasons adapting an open textbook might be for you:

1. Address a particular teaching style or learning style
2. Adjust for a different grade or course level
3. Address diversity needs
4. Meet a cultural, regional, or national preference
5. Make the material more accessible for people with disabilities
6. Add material contributed by students or material suggested by students
7. Translate the material into another language
8. Correct errors or inaccuracies
9. Update the book with current information
10. Add more media or links to other resources

Attributions

This chapter contains material from the *BCcampus Open Education Adaptation Guide* by BCcampus is used under a CC BY 4.0 International license. Download this book for free from <http://open.bccampus.ca>.

The “Reasons” above are adapted from WikiEducator,

“Adapt” in OER Handbook for Educators and Why Remix Open Educational Resources?, created by Liam Green-Hughes, both used under a CC BY license.

Learning Objectives

- Understand what attribution is
- Understand the difference between attributions and citations
- Understand the four components that should be included in any attribution statement

Attribution

Attribution is giving credit to the original creator of the work, fulfilling the BY license component. Attribution is the minimum requirement of all CC-licenses.

Attribution vs Citation

Attribution is a similar process to citing academic works in a paper, but there are some key differences. The following table ¹ outlines

1. This table was adapted by Abbey Elder from "Citation vs. Attribution" by Lauri Aesoph, licensed CC BY 4.0.

some of the ways in which citations and attribution are similar and different:

Citation	Attribution
Purpose is academic (e.g. avoiding plagiarism)	Purpose is legal (e.g. following licensing regulations)
Does NOT typically include licensing information for the work	Typically includes licensing information for the work
Used to quote or paraphrase a limited portion of a work	Used to quote or paraphrase all or a portion of a work
Can paraphrase, but cannot typically change the work's meaning	Can change the work under Fair Use or with advance permission (e.g., under most CC licenses)
Many citation styles are available (e.g., APA, Chicago, and MLA)	Attribution statement styles are still emerging, but there are some defined best practices
Cited resources are typically placed in a reference list	Attribution statements are typically found near the work used (e.g., below an image)

Required Components for Attribution ²

Component	Description
Title	Title of the work
Author	Author of the work. List all authors.
Source	URL for the work
License	The license for the work

Attribution

This chapter was adapted from the following:

Abbey Elder from “Citation vs. Attribution” by Lauri Aesoph, licensed CC BY 4.0. ↵

Creative Commons. Creative Commons Certificate for Educators, Academic Librarians and GLAM, 2022.
<https://certificates.creativecommons.org/cccertedu/> ↵

2. Creative Commons. Creative Commons Certificate for Educators, Academic Librarians and GLAM, 2022.
<https://certificates.creativecommons.org/cccertedu/>

Learning Objectives

- Understand answers to common questions around attributing when reusing and remixing

How do I attribute works used at the book level in UTSA Pressbooks?

Attributing Works Used

Pressbooks Admin > Book Info > Source

Do I need to include “unless where otherwise noted?”

The Creative Commons recommended format¹ for attributing does not include this as an essential component of the attribution

1. Creative Commons. (2022). Frequently Asked Questions - Creative Commons.

statement. However, Pressbooks will do this automatically for all books in the case that a chapter of a book has a different license than the overall book. We need to go further down this rabbit hole of how this is possible. A hunch: it has to do with fair use², and Creative Commons works are not excepted from fair use.

Which is preferable: “Licensed Under” or “Licensed?”

The Open Attribution Builder³ adds Licensed Under as the default whenever you create an attribution statement using that tool. However, you do not have to preface your copyright statement or your attribution statement with “Licensed Under.” You can opt for the more concise “Licensed.”

When re-using another CC-licensed work, who do I list as the author? The original author or myself?

It depends. How much has the book been changed from its original version? If minimal surface changes were made, it’s recommended to retain the original author as the author. If more work went into putting the book into Pressbooks from another format, including

2. Creative Commons. (2022). Frequently Asked Questions - Creative Commons.
3. Open Washington: Open Educational Resources Network. (2022). Open Attribution Builder.

creating a custom cover image with plans for additional tailoring, it makes sense to list the adapter as the author. This is where the attribution statement saves us: because you are linking out to the original book, users will be able to see the original source.

Do I need to put quotes around a book title when attributing?

No, this is not necessary. The attribution statement is cleaner without them. Do use quotes for image attributions, though.

How do I attribute multiple authors?

List all authors.

Example

Counter Unmanned Aircraft Systems Technologies and Operations. / R. K. Nichols; J.J.C.H. Ryan; H.C. Mumm; C. Carter; W.D. Lonstein; and J.P. Hood. CC-BY-NC- SA

Is it okay to use a license acronym when attributing? For example, CC-BY instead of Creative Commons Attribution?

Yes, because you will link to the full license. It's not wrong to spell out the full license, but it's also not necessary. Both the abbreviated and the extended version are fine but the abbreviated looks cleaner.

Examples

Both are acceptable, as they link out to the license with more information:

- CC-BY
- Creative Commons Attribution 4.0 International

How do attribute works used at the chapter level in UTSA Pressbooks?

If the chapter only contains material from another source and the material has not been changed (i.e., not adapted), then use an attribution statement like below.

Borrowed Text (No Changes Made)

This chapter is comprised of text taken from Chapter 2.2 of *Physical Geography and Natural Disasters* by R. Adam Dastrup and is used under a CC BY-NC-SA 4.0 license. No changes have been made nor original material added.

Borrowed Text Merged with Original Text

If the chapter contains some original material AND some material from another source, then use “This chapter contains material taken from....”⁴

Do I need to keep track of changes I make throughout a derivative book?

According to the Creative Commons FAQ, you must indicate if you have modified the work in your attribution

4. The BCcampus Open Education *Adaptation Guide* by Lauri M. Aesoph is used under a CC BY 4.0 licence.

statement. It is a good idea to keep track of changes that were made to the original text through track changes. It is not necessary to note trivial alterations, such as correcting a typo or changing a font size. Finally, you must retain an indication of previous modifications to the work.

Do I need to note in my attribution if the book is a derivative of another book?

If you are creating a manual attribution, you do not need to add this as part of your attribution statement. You only need to list Title, Author, Source, and License. But you can note this if you would like.

If you use the Open Attribution Builder, it will ask if the book is a derivative of another book. If it is, you can select that, and then provide the URL for the original book. The Open Attribution builder will add this to your attribution statement.

When you clone a book in Pressbooks, it will add all of the attribution information for the original. Under Book Info > Copyright > Source Book URL

Example

Book Info Section of a UTSA Cloned version of the OER Starter Kit

Copyright

Source Book URL

This book was cloned from a pre-existing book at the above URL. This information will be displayed on the webbook homepage.

Copyright Year

Year that the book/works published.

Copyright Holder

Name of the copyright holder.

Copyright License

You can select various licenses including Creative Commons.

Copyright Notice


B I U

You are free to copy, share, adapt, remix, transform, and build upon the material for any purpose, even commercially, as long as you follow [the terms of the license](#).

Learning Objectives

- See examples of providing attribution at the book and chapter level
- See examples of providing attribution when using a variety of CC-licensed works

Type	Attribution Statement	Level	Pressbooks Menu
Cloned Book ¹	<p>BOOK SOURCE</p> <p>This book is a cloned version of The OER Starter Kit by Abbey Elder, published using Pressbooks by Iowa State University Digital Press under a CC BY (Attribution) license. It may differ from the original.</p>	Book	Pressbooks Admin: Book Info > Source
Adapted Book ²	<p>BOOK DESCRIPTION</p> <p>This edition of Pressbooks Guidelines for the University of Minnesota was adapted from the UC Berkeley Pressbooks Guidelines, written by the Office of Scholarly Communication Services, UC Berkeley Library, and licensed under Creative Commons Attribution-NonCommercial 4.0 International License.</p>	Book	Pressbooks Admin: Book Info > Copyright Notice
Book: Derivative of Multiple Works ³	<p>The OER Starter Kit was adapted from the following resources:</p> <p>The ABOER Starter Kit by Technologies in Education at the Faculty of Education, the University of Alberta, CC BY 4.0.</p> <ul style="list-style-type: none"> • Considerations for Using or Creating OER • Creative Commons • Accessibility and Usability <p>SUNY OER Community Course by SUNY OER Services, CC BY 4.0.</p> <ul style="list-style-type: none"> • Introduction to Open Educational Resources, "Benefits for Instructors" <p>Inclusive All Students by SUNY OER Services, CC BY 4.0</p> <ul style="list-style-type: none"> • Diversity & Inclusion <p>UH OER Training by Billy Meinke and University of Hawai'i Outreach College, CC BY 4.0.</p> <ul style="list-style-type: none"> • Copyright & Open Licensing, "Licensing" and "Public Domain" • Planning & Completing Your OER Project • Accessibility & Usability <p>SPARC Open Education Primer by the SPARC Open Education Leadership Program, CC BY 4.0.</p> <ul style="list-style-type: none"> • Tools & Techniques for Creating OER <p>Selecting Textbooks and Accessibility by Affordable Learning Georgia, permission received for adaptation.</p> <ul style="list-style-type: none"> • Accessibility & Usability • Evaluating OER 	Book: Front Matter	Pressbooks Admin > Organize > Add Front Matter > Attribution
Derivative of One Work ⁴	<p>1. Planning & Completing your OER Project was adapted from Scoping an OER Project by Billy Meinke, licensed CC BY 4.0.</p>	Chapter: Footnotes	Chapter View > Insert > Footnotes

<p>Derivative of Multiple Works ⁵</p>	<ol style="list-style-type: none"> 1. Attribution: This chapter was adapted from the SPARC Open Education Primer created by the SPARC Open Education Leadership Program, licensed CC BY 4.0. ↵ 2. Mays, Elizabeth, et al. A Guide to Making Open Textbooks with Students. Rebus Community, 2017. https://press.rebus.community/makingopentextbookswithstudents/ ↵ 	<p>Chapter: Footnotes</p>	<p>Chapter View > Insert Footnotes</p>
<p>Image ⁶</p>	 <p>"Earth" by Kevin M. Gill is licensed under CC BY 2.0</p>	<p>Image Caption</p>	<p>Pressbooks Admin > Add Media > Upload Files > Caption</p>

1. Elder, Abbey. OER Starter Kit for RTC, 2019. <https://openwa.pressbooks.pub/oerstarterkitrtc/>
2. University of Minnesota Libraries. Pressbook Guidelines for the University of Minnesota, 2019. <https://pressbooks.umn.edu/guidelines/>
3. Elder, A.K. (2019). The OER Starter Kit. Ames, IA: Iowa State University Digital Press. DOI: <https://doi.org/10.31274/isudp.7>
4. Authors: University of Alberta Centre for Teaching and Learning and University of Alberta Library (2019). The University of Alberta OER Starter Kit. Ames, IA: Iowa State University Digital Press. DOI: <https://doi.org/10.31274/isudp.7>
5. Elder, Abbey. OER Starter Kit for RTC, 2019. <https://openwa.pressbooks.pub/oerstarterkitrtc/>

6. Creative Commons. Creative Commons Certificate for Educators, Academic Librarians and GLAM, 2022.
<https://certificates.creativecommons.org/cccertedu/>

Attributions

Regardless of the Creative Commons license you choose for your OER, *all* CC licenses require at least an attribution to the original creator of the work (the “BY” part of a CC license). Below are some examples of how to create attribution statements for text and media.

This attribution builder from Open Washington can also be a useful tool. Creative Commons also has best practices for attribution.

Examples of attribution statements

All Creative Commons licenses contain an attribution (BY) clause. This means that you must include a statement that gives credit to, or attributes, the creator of the work from which you have borrowed, whether it’s text, an image, a video, or other item. If you have made a change, indicate that in your attribution statement.

As far as how and where to place attribution statements for text or media taken from another source or sources, best practices state that you should place them at the bottom of each affected web page. Clearly mark all of these with a heading called: “Attributions”. Several attribution statements can be listed under this heading. Here are examples.

Example of an attribution statement for adapted text

This chapter is an adaptation of *Natural Disasters and Human Impacts* (on Open Geography Education) by R. Adam Dastrup and Maura Hahnenberger, and is used under a CC BY-SA 4.0 International license.

Note:

- The statement is clear, simple, and contains all elements required for a complete attribution: title of the work used, author(s), and license type. A link is provided to the original work, the home page of the website (this is optional), and the license type.
- There is no need to name the adapting author in this statement. This information should either be included on the **Book Info** page as a main author OR if you want to indicate which author wrote/adapted which chapter, you can use the **Chapter Author** option at the bottom of each chapter/web page in Pressbooks.
- If the book is to be CC BY licensed, then you will need to address the conditions dictated by the license for each resource you are using in your adaptation. At the bottom of the **Chapter** page in Pressbooks, there is an option to set the license type for that page which will override, for this page only, the overarching license chosen for the book on the Book Info page.
- If the chapter contains some original material AND some material from another source, then rather than saying “This chapter is an adaptation of...”, say “This chapter contains material taken from....”.

Example of an attribution statement for an adapted image

Figure 1.2

Dog by David Locke is used under a CC BY 2.0 license. Modifications to this photo include cropping.

Note:

- The statement is clear, simple and contains all elements required for a complete attribution: title of the image, photographer, and license type, as well as a note of the changes made. A link is provided to the original work, the home page of the photographer (if available), and the license type.

Attribution

This chapter contains material from the Faculty OER Toolkit by Shannon Moist and is used under a CC BY 4.0 International License. Download this book for free at <http://open.bccampus.ca>.

Learning Objectives

By the end of this section, you will be able to:

- Provide a definition for open pedagogy.
- Describe the major components of a renewable assignment.
- List three tools commonly used for the creation of renewable assignments.

Free access to materials is not the only benefit provided by using OER. Another aspect of OER that is commonly commended by instructors is the academic freedom that using openly-licensed content affords them in taking control of their classroom and engaging students in learning.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=101#oembed-1>

Attribution: “Open Dialogues: How to engage and support students in open pedagogies” by Centre for Teaching, Learning and Technology, University of British Columbia is licensed CC BY 3.0.

Innovation in the Classroom

The **open licenses** on OER allow instructors to adapt and integrate materials into their classes in new ways, incorporating topics of local interest or translating content into another language. Instructors who teach graduate-level courses or courses in niche subject areas are often drawn to OER for two reasons:

1. They can adapt existing materials to meet the specific needs of their class.
2. They can share created materials with other instructors in their subject area around the world.

Developing new open educational resources can be incredibly impactful, especially for instructors who feel they are underserved by the traditional textbook model and market.

Open Pedagogy

Using open educational resources in the classroom can make it easier for students to access and interact with course materials. However, another major aspect of Open Education asks not “what you teach with” but “how you teach.” The set of pedagogical practices that include engaging students in content creation and making learning accessible is known as **open pedagogy**.

As DeRosa & Jhangiani explain, “one key component of open pedagogy might be that it sees access, broadly writ, as fundamental to learning and to teaching, and agency as an important way of

broadening that access.”¹ DeRosa & Robison expand on this topic, explaining that:

“students asked to interact with OER become part of a wider public of developers, much like an open-source community. We can capitalize on this relationship between enrolled students and a broader public by drawing in wider communities of learners and expertise to help our students find relevance in their work, situate their ideas into key contexts, and contribute to the public good.”²

Depending on the source you consult, open pedagogy might be a series of practices, a learning style, or a state of mind. For the sake of this chapter, open pedagogy is defined as a series of practices which involve engaging students in a course through the development, adaptation, or use of open educational resources.

One method of engaging in open pedagogy is the development of renewable assignments, assignments which students create for the purpose of sharing and releasing as OER. These can range in content from individual writing assignments in Wikipedia to collaboratively-

1. DeRosa, Robin and Jhangiani, Rajiv. "Open Pedagogy and Social Justice." *Digital Pedagogy Lab*. June 2, 2017. <http://www.digitalpedagogylib.com/open-pedagogy-social-justice/>
2. DeRosa, Robin and Robison, Scott. "From OER to Open Pedagogy: Harnessing the Power of Open." In *Open: The Philosophy and Practices that are Revolutionizing Education and Science*, edited by Rajiv Jhangiani and Robert Biswas-Diener, 115–124. London: Ubiquity Press, 2017. DOI: <https://doi.org/10.5334/bbc.i>

written textbooks.³⁴ Wiley & Hilton compiled the criteria in **Table 2** to distinguish between different kinds of assignments, from least to most open.⁵ You can explore more examples of open pedagogy in action in the Open Pedagogy Notebook.

Table 2: Wiley & Hilton’s (2018) Criteria Distinguishing Different Kinds of Assignments

	Student creates an artifact	The artifact has value beyond supporting its creator’s learning	The artifact is made public	The artifact is openly licensed
Disposable assignments	Yes	No	No	No
Authentic assignments	Yes	Yes	No	No
Constructionist assignments	Yes	Yes	Yes	No
Renewable assignments	Yes	Yes	Yes	Yes

3. Villeneuve, Cassidy. "Editing Wikipedia in the Classroom: Individualized Open Pedagogy at Scale." *Open Pedagogy Notebook*. May 17, 2018. <http://openpedagogy.org/course-level/editing-wikipedia-in-the-classroom-individualized-open-pedagogy-at-scale/>
4. DeRosa, Robin. "Student-Created Open “Textbooks” as Course Communities." *Open Pedagogy Notebook*. March 18, 2018. <http://openpedagogy.org/course-level/student-created-open-textbooks-as-course-communities/>
5. Wiley, David and Hilton III, John. "Defining OER-Enabled Pedagogy." *The International Review of Research in Open and Distributed Learning* 19, no. 4 (2018). <http://www.irrodl.org/index.php/irrodl/article/view/3601/4724>.

Tools for implementing renewable assignments

- **Hypothes.is:** One of the tools commonly used for open pedagogy projects is Hypothes.is. Hypothes.is allows users to annotate websites and online readings easily. Using hypothes.is can let students engage with your course readings and each other in a more interactive way than discussion boards might allow.
- **Wikibooks:** Wikibooks and WikiEdu are both excellent tools for working with students to create a text. Alternatively, short student projects, such as annotated bibliographies, can be done via Wikipedia by adding context and citations to short or underdeveloped articles. This not only gives students the opportunity to get experience explaining concepts for a public audience, it also increases the available public knowledge on your course's topic!
- **Google Drive:** Google Drive provides a variety of tools that can be used for collaboration on text-based projects as well as slideshows and spreadsheets.
- **Youtube:** Student-made instructional videos or class projects can be incredibly useful to showcase for future students in the class or to use as supplemental materials for explaining difficult concepts.

Check Your Understanding

Brainstorm some renewable assignments. Do you already assign work that could be defined as renewable?

MAKING YOUR BOOK

PRESSBOOKS

You create the body of your book by adding content and structure through the **Organize** page. However, Pressbooks automatically generates some parts of your book, depending on the book format you're creating and the settings you have. In this chapter, we'll cover what content is created automatically and how to change or modify it. This includes:

- Title Page
- Half-title Page
- Table of Contents
- Numeration and Running Content
 - Part and Chapter Numbers
 - Page Numbers
 - Running Content
- Copyright Page

Title Page

Pressbooks automatically generates a title page for all PDF, EPUB, and MOBI exports. By default, this title page must include the title of your book and the author's name. Depending on how much information you've entered into the **Book Info** page, the title page will include:

- Title
- Subtitle
- Author
- Publisher
- Publisher city

If you'd like to override the automatic title page, you can create a custom title page. Read on to the next section for more details.

Making a Custom Title Page

You can style and add content to your own custom title page and use it to replace the automatically generated one. Just follow these steps:

1. Go to **Organize > Add Front Matter** to create a new Front Matter post
2. In the Front Matter Type panel, select type "Title Page"
3. Create your custom title page in the editor
4. Save and export your book

You can also take advantage of Pressbooks' built-in styles to create your title page. The classes below can be wrapped around their corresponding content in the **Text Editor**. We recommend only using this approach if you're comfortable working with HTML.

```
<h1 class="title">Title</h1>
<h2 class="subtitle">Subtitle</h2>
<h3 class="author">Author</h3>
```

```
<h4 class="publisher">Publisher</h4>
```

```
<h5 class="publisher-city">Publisher City</h5>
```

Half-Title Page

Many Pressbooks themes will also include a half-title page in all PDF files. Unlike the full title page, the half-title page includes just the title of the book. Note that this page is not included in your ebook exports.

If you'd like to remove the half-title page from your book, follow these steps:

1. Go to **Appearance > Custom Styles** from the left sidebar menu
2. Select the **PDF** stylesheet from the dropdown menu at the top of the page
3. Copy paste the following code into the **Your PDF Styles** section: **#half-title-page {display: none;}**
4. Save your changes and re-export the PDF file

Table of Contents

Pressbooks automatically creates a table of contents for all formats of your book: webbook, ebook, and print.

By default, all tables of contents contain chapter titles and page numbers. They can also contain the following elements:

- **Part titles:** Appear automatically when a book has more than one part
- **Part and chapter numbers:** Can be enabled and disabled using the “Part and Chapter Numbers” setting from **Appearance > Theme Options > Global Options**
- **Chapter subtitle:** Can be added in the “Chapter Subtitle” field in the “Chapter Metadata” section beneath each chapter’s editor
- **Chapter author(s):** Can be added in the “Chapter Author” field in the “Chapter Metadata” section beneath each chapter’s editor (**NOTE:** The author must already be added as a contributor — see more)
- **Chapter copyright license:** Can be chosen from the “Chapter Copyright License” dropdown menu in the “Chapter Metadata” section beneath each chapter’s editor, and then enabled and disabled using the “Chapter Licenses” setting from **Appearance > Theme Options > Global Options**
- **Chapter subsection titles:** Can be enabled or disabled using the “Two-Level TOC” setting from **Appearance > Theme Options > Global Options** (see more)

Every theme is built with a table of contents whose design complements the appearance of the rest of your book.

Removing the Table of Contents

The table of contents is necessary for the navigation and accessibility of digital book formats, including all webbooks and ebooks. Ebook distributors will require that your book has a table of contents before it can be accepted for publication.

However, the table of contents can be disabled for the PDF format so that it does not appear in your print books.

To enable or disable the table of contents in your PDF files:

1. Go to **Appearance > Theme Options** from the left sidebar menu
2. Select the **PDF Options** tab
3. Find the “Table of Contents” setting
4. Select or deselect “Display table of contents”
5. Save your changes and re-export your files

Numeration and Running Content

Page numbers, parts, and chapters all get automatically numbered throughout your book in various formats. Pressbooks also generates running headers or footers in all PDF files.

Part and Chapter Numbers

By default, Pressbooks automatically generates part and chapter numbers for your book. These are visible in all book formats. These numbers display on part and chapter title pages as well as on the table of contents. The design of part and chapter numbers will depend on the theme you’ve chosen.

To globally disable all part and chapter numbers:

1. Go to **Appearance > Theme Options** from the left sidebar menu
2. Select the **Global Options** tab
3. Find the “Part and Chapter Numbers” setting
4. Deselect the “Display part and chapter numbers” checkbox
5. Save your changes and re-export your files

You can also disable numbers on each chapter individually by

choosing “Numberless” from the Chapter Type panel next to the chapter editor.

Page Numbers

Pressbooks automatically creates page numbers for all PDF files. Page numbers cannot be disabled using any setting in Pressbooks. Generally, front matter page numbers will display in lower Roman numerals (i, ii, iii) until the Introduction page. All body and back matter pages will be numbered in Arabic (1, 2, 3) numerals. Page number design will depend on the theme you’ve chosen.

Page numbers will automatically reflow whenever you add or remove content, change your theme, or adjust other elements of the design.

NOTE: Page numbers do not appear in EPUB and MOBI files. Pressbooks does not create fixed-format ebooks, which means content will reflow depending on a reader’s device, software, and display settings.

Running Content

All themes have running content included in the template for the PDF. Depending on the theme you’ve chosen, that running content may be in the header or the footer. You can customize your running content by following these steps:

1. Go to **Appearance > Theme Options** from the left sidebar menu

2. Select the **PDF Options** tab
3. Find the “Running Heads & Feet” section
4. Choose what content you’d like for each page location in your book
5. Save your changes and re-export your files

You can customize the running content for the right and left pages of each of the follow sections:

- Front Matter
- Introduction
- Part
- Chapter
- Back Matter

You can select any of the following pieces of content to appear in the running header or footer:

- Book title
- Book subtitle
- Book author
- Section title
- Section subtitle
- Section author
- Blank
- Custom

For more information on this setting, [click here](#).

Copyright Notice

Your book’s copyright notice states all the legal information readers need to know about your book, and specifically limits or grants

permission for readers to copy that book. A copyright notice may include the following information:

- Name of the copyright holder
- Year of publication
- Chosen copyright license
- Information about production, printing
- Notices about cover design
- Library of congress catalog numbers
- ISBN

Pressbooks automatically generates a copyright notice for all formats of your book. In print and ebook files, the copyright notice is added as a page in the front matter of your book. In your webbook, the copyright notice appears on the homepage. For more information about what order front matter appears in, check out this chapter.

By default, Pressbooks creates your book with an All Rights Reserved license, which prohibits any copying or distribution of the book. The generated copyright notice will include the copyright holder, the year of publication, the title of the book, and the license type.

However, Pressbooks provides many options for choosing different copyright licenses and customizing your copyright notice. You can choose from any of the following copyright licenses:

- All Rights Reserved
- CC-BY (Attribution)
- CC-BY-NC (Attribution Non-commercial)
- CC-BY-NC-ND (Attribution Non-commercial No Derivatives)
- CC-BY-NC-SA (Attribution Non-commercial Share Alike)
- CC-BY-ND (Attribution No Derivatives)
- CC-BY-SA (Attribution Share Alike)
- CC0 (Creative Commons Zero)
- Public Domain

For more information on what's entailed when you use a Creative Commons (CC) license, see Creative Commons' guide to sharing your work.

Here's the quick and simple way to add a copyright notice to your book's metadata:



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Making a Custom Copyright Page

In order to make a custom copyright page:

1. Go to the **Book Info** from the left sidebar menu
2. Scroll down to the **Copyright** section.
3. Add your custom content to the **Copyright Notice** section

Designating Chapter-Level Copyright Notices

You can designate a copyright notice for a chapter that differs from the global copyright notice for the book. In this case, the chapter-level copyright license overrides the book license. To assign a chapter-level copyright notice:

1. Go to **Appearance > Theme Options** and select the “Display the copyright license” option

2. Save your changes
 3. Access the chapter
 4. Scroll down to the “Chapter Metadata” section below the editor.
 5. Select the chapter license
 6. Save your changes
-

Prefer to watch and learn? Watch this instructional video, created by our friends at BCcampus.

[https://admin.video.ubc.ca/p/122/sp/12200/embedIframeJs/uiconf_id/23448488/partner_id/122?iframeembed=true&playerId=kaltura_player&entry_id=0_swecu272&flashvars\[streamerType\]=auto&flashvars\[localizationCode\]=en&flashvars\[leadWithHTML5\]=true&flashvars\[sideBarContainer.plugin\]=true&flashvars\[sideBarContainer.position\]=left&flashvars\[sideBarContainer.clickToClose\]=true&flashvars\[chapters.plugin\]=true&flashvars\[chapters.layout\]=vertical&flashvars\[chapters.thumbnailRotator\]=false&flashvars\[streamSelector.plugin\]=true&flashvars\[EmbedPlayer.SpinnerTarget\]=videoHolder&flashvars\[dualScreen.plugin\]=true&&wid=0_f7cnznc8](https://admin.video.ubc.ca/p/122/sp/12200/embedIframeJs/uiconf_id/23448488/partner_id/122?iframeembed=true&playerId=kaltura_player&entry_id=0_swecu272&flashvars[streamerType]=auto&flashvars[localizationCode]=en&flashvars[leadWithHTML5]=true&flashvars[sideBarContainer.plugin]=true&flashvars[sideBarContainer.position]=left&flashvars[sideBarContainer.clickToClose]=true&flashvars[chapters.plugin]=true&flashvars[chapters.layout]=vertical&flashvars[chapters.thumbnailRotator]=false&flashvars[streamSelector.plugin]=true&flashvars[EmbedPlayer.SpinnerTarget]=videoHolder&flashvars[dualScreen.plugin]=true&&wid=0_f7cnznc8)

PRESSBOOKS

The Copyright page is another automatic page that Pressbooks creates.

Traditional books have a copyright page, which contains various “legalese” about the book. Copyright pages can be used for all sorts of other things, including:

- Acknowledgements (for instance of funding agencies)
- Information about production, printing
- Notices about cover design
- Library of congress catalog numbers
- ISBN
- etc.

Pressbooks automatically inserts a copyright page, immediately after the title page.

At a minimum, the copyright page will include an automatically-generated message containing: Book title, copyright holder, and year of publication.

Here’s the quick and simple way to add a copyright notice to your book’s metadata:



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But you may want something more extensive. For example, if you want the ISBN to appear, you will have to create a custom copyright page.

Making a Custom Copyright Page

In order to make a custom copyright page:

1. Go to the **Book Info** page (see left menu).
2. Scroll down to the **“Copyright”** section.
3. Add whatever you like to the **“Copyright notice”** section.

Designating Chapter-Level Copyright Notices

You may find that in a textbook or edited monograph, different chapters have different copyright licenses. It is possible to add chapter-level license notices to your book, however this feature is in development and has variable results across outputs. It is best used for the web version of your book, and we are working to improve its functionality for PDF and ebook. To activate:

1. Go to “Appearance” -> “Theme Options” and select the “Display the copyright license” option.
2. Save your changes.
3. Go to the chapter where the license will be different from the global license.
4. Scroll down to the “Chapter Metadata” section below the editor.
5. Select the chapter license.
6. Update or save draft.

Note: Currently, this option will display the license abbreviation

(e.g. cc-by-nd) in your PDF table of contents. To avoid this, while retaining the chapter licenses in the web version, we recommend using a custom copyright notice for your book as a whole, and deactivating the “Display the copyright license” option before exporting your PDF.

Prefer to watch and learn? Here’s a brief visual intro to adding chapter level authors and licenses in Pressbooks.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=113#oembed-2>

PRESSBOOKS

This chapter will explain the different parts of a book, the order that they appear in your Pressbooks exports and how to change the order.

The Parts of a Book

Books are traditionally organized into three sections: the front matter, the text and the back matter. Each of these is made up of standard types of content. Pressbooks follows the Chicago Manual of Style conventions, which lists the order of a book as follows:

Front Matter

Book half title
Series title, frontispiece or blank
Title page
Copyright Page
Dedication
Epigraph
(Table of) Contents
(List of) Illustrations
(List of) Tables
Foreword
Preface

Acknowledgments (if not part of preface)
Introduction (if not part of text)
Abbreviations (if not in back matter)
Chronology (if not in back matter)

Text

First text page (Introduction or Chapter 1)
or
Second half title or first part title
First text page
Subsequent part titles and chapters

Back Matter

Acknowledgements (if not in front matter)
Appendix (or first, if more than one)
Second and subsequent appendixes
Chronology (if not in front matter)
Abbreviations (if not in front matter)

Notes
Glossary
Bibliography or References
(List of) Contributors
Illustration Credits (if not in captions or elsewhere)
Index(es)

Why does this matter?

Now obviously, not every book will have all of those parts! In fact, many will only have a few basic ones, like a title page and a copyright page. However, if you do choose to add extras, it is important to know the order in which they will appear.

Front Matter

Pressbooks automatically creates the following pages:

- Title page (and in PDF, Half-title page)
- Copyright page
- Table of contents (optional in PDF, required in EPUB/MOBI)

If you then choose to add, for example, an epigraph and a dedication, your front matter might look like this:

Front Matter	Author	Comments	Status	Private	Show Title	Export	Edit
Epigraph	You	0	Draft	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit — Delete
Dedication	You	0	Draft	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit — Delete

[Add Front Matter](#)

Front Matter

If these two sections have been properly tagged as an epigraph and dedication (for more on this see our chapter on Front Matter) and you export them, you will see that their order has been reversed. This is because the Chicago Manual of Style order overrides the order in which you see your front matter in the “Organize” window. In a PDF, you would see:

- Half title
- Title page
- Copyright page
- Dedication
- Epigraph
- Table of Contents

But there is an easy fix—simply **swap the tags** on the dedication and the epigraph to change the order in which they appear.

Alternatively, if you wanted both to appear **after the TOC**, you can label them as ‘Miscellaneous’.

But wait, there’s more! If you would like to also include front matter **before the title page** (such as praise, or other books by the author), you can tag it as ‘Before Title Page’ to once again override the usual order of things.

NOTE: Each specified ‘tag’ has its own styling which can affect how your final pages will look. If necessary, you may need to apply custom CSS to change how they appear.

Text

This usually doesn’t pose too many problems. You can change the order in which your chapters and parts appear from the “Text → Organize” view. For more, see our chapters on Parts and Chapters.

Back Matter

Customizing your back matter functions much the same as for your front matter. For more on the different types of back matter and how they work, see our dedicated chapter.

When writing and editing your work in Pressbooks, you have a choice between working in the “Visual Editor” and the “Text Editor” according to your preferences. This chapter will cover the different features of:

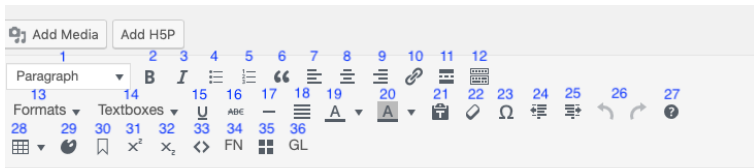
- Visual Editor
- Text Editor

Visual Editor

The visual editor is the default editor. It is a WYSIWYG (What You See Is What You Get) interface that allows you to see styling and formatting as they are applied.

This interface also includes a toolbar that the top of the editor. While most options are straightforward, there are a range of buttons whose functions might not be obvious at first. Below is a guide to each of the toolbar functions, and where you'll find them.

NOTE: While much of this formatting is possible in other programs, such as MS Word, applying it in the Pressbooks editing interface ensures it will function correctly in all outputs. For more, read our chapter on common formatting problems.



This is the first chapter in the main body of the text. You can change the text, rename

Toolbar options:

1. Paragraph styles dropdown menu: choose from normal paragraph style, six different heading styles, or preformatted text
2. **Bold**
3. *Italics*
4. Bulleted list
5. Numbered list
6. Blockquote
7. Left-align
8. Center-align
9. Right-align
10. Link
11. Read more
12. Toolbar toggle
13. Formats dropdown menu: choose from several text indent and tracking options, as well as pullquote options
14. Textboxes dropdown menu: choose from a variety of plain textboxes or predesign educational textboxes (read more here)
15. Underline
16. ~~Strikethrough~~
17. Horizontal line
18. Justify
19. Text color
20. Text background color
21. Paste as text
22. Clear formatting

23. Special character
24. Decrease indent
25. Increase indent
26. Undo and Redo
27. Keyboard shortcuts guide
28. Tables (read more here)
29. Apply Class
30. Anchor
31. Super^{script}
32. Subscript
33. Code
34. Footnote¹ (read more here)
35. Convert MS footnotes
36. Glossary **Term** (read more here)

You can highlight a section of existing content and then click a tool on the toolbar to add formatting to that section. Alternatively, select the tool first, and then add new formatted content.

NOTE: The visual editor toolbar displays all formatting options by default. You can collapse the second and third rows of tools by clicking the toggle button (12).

Text Editor

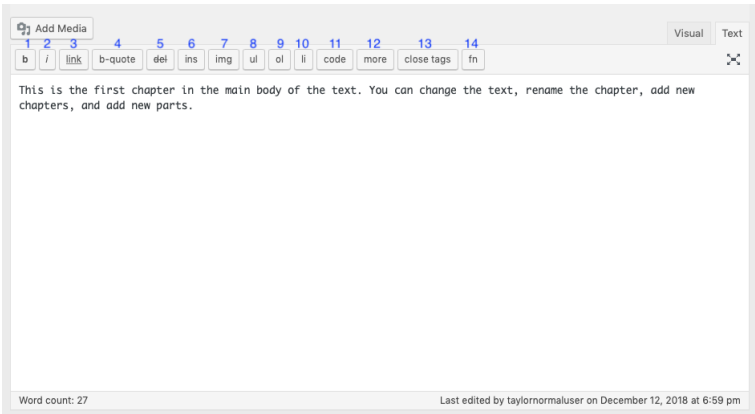
As an alternative to the visual editor, you can also work in a text

1. This is an example of a footnote.

editor, or switch to it as necessary for specific needs. Here, you can view and edit the HTML version of any text written and formatted in the visual editor, and you can also write directly in HTML, using the toolbar as necessary.

The text editor toolbar offers fewer options, tailored to working in HTML. They are detailed below.

NOTE: While you can work in HTML directly, not all HTML will work in all exports. We recommend keeping it simple, and using the tools available in the visual editor as a guide.



1. Open and close tags to make text bold (click once to open, and again to close the tag)
2. Open and close tags to make text italics
3. Link text (a pop up will appear)
4. Insert the blockquote tags
5. Strikethrough text (also adds a date and time marker)
6. Insert a date/time tag
7. Insert an image (from URL)

8. Insert a bulleted list
9. Insert a numbered list
10. Add list item
11. Open and close `<code>` tags, to style text as code
12. Insert a 'Read More' tag (beta)
13. Close tags (automatically closes any open tags)
14. Open and close footnote shortcode

Create a Book

Creating a book can feel daunting! The great thing about OER and UTSA Pressbooks is that you don't have to start from scratch. You can use Pressbooks Directory to find existing OER that align with your course, make a copy of those OER, and tailor them.

Pressbooks Directory

<https://utsa.hosted.panopto.com/Panopto/Pages/Embed.aspx?id=e05780b1-d5b9-4838-b1ff-af670107b9e6&autoplay=false&offerviewer=true&showtitle=true&showbrand=true&captions=false&interactivity=all>

Clone a Book

Once you identify a Pressbooks Directory book, cloning that book on UTSA Pressbooks so that you can tailor it is just a few simple steps.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=118#oembed-1>

Organize Your Book

Pressbooks has all of the features that you would find in traditional books: the ability to add both front and back matter and the ability to see your book at a high level view, quickly move chapters, control privacy for certain chapters and so much more.

<https://utsa.hosted.panopto.com/Panopto/Pages/Embed.aspx?id=b3065198-7215-4067-b5a8-adb2013615c6&autoplay=false&offerviewer=true&showtitle=true&showbrand=true&caption=false&interactivity=all>

Import Chapters

Now that you've successfully cloned a book, you are reading to identify other books that may have chapters you can pull into your current book. This is known as remixing and is a powerful tool when using Pressbooks and OER in general. When remixing, be sure licenses of the original books are compatible. Questions? Email oyer@utsa.edu.

<https://utsa.hosted.panopto.com/Panopto/Pages/Embed.aspx?id=b45b225a-3870-483e-ad56-af0e01381ba1&autoplay=false&offerviewer=true&showtitle=true&showbrand=true&captions=false&interactivity=all>

Add Chapter-Level Content

Pressbooks is built on the WordPress platform and has a visual “What you see is what you get” editor making it easy to add text boxes, images, tables, and other media. You can also edit the HTML or text if you'd like.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=118#oembed-2>

Images

You can insert Creative Commons licensed images into your book.

<https://utsa.hosted.panopto.com/Panopto/Pages/Embed.aspx?id=907375fc-e696-42b2-9764-af6b012d3e06&autoplay=false&offerviewer=true&showtitle=true&showbrand=true&captions=false&interactivity=all>

Videos

You can also embed YouTube videos. The videos will automatically render in your chapter.

<https://utsa.hosted.panopto.com/Panopto/Pages/Embed.aspx?id=166724a6-941a-438d-8d0f-adc501142dc2&autoplay=false&offerviewer=true&showtitle=true&showbrand=true&captions=false&interactivity=all>

PRESSBOOKS

Pressbooks supports adding one sub-level to your Table of Contents. Below are instructions on how you can use Heading 1 to enable a second level on your TOC.

1. Go to Appearance > Theme Options
2. Select “Enable a two-level TOC”
3. Now, in your content, headings tagged with `<h1>` tags should be parsed into a (linked) subsection in your TOC.

Please note that these second levels (with H1 headings) appear collapsed by default. This means that while they **are** in the TOC, you will have to click on the + button next to the chapter so that this second level shows.

Finally, not all Themes have been tested with this feature – if things look funny, please test another theme.

PRESSBOOKS

The Pressbooks writing interface enables you to create multiple sections within your book. In this chapter, you will learn:

- About common parts of a book, and how they work in Pressbooks
- How to organize your book using Parts in Pressbooks
- How to add, delete and rename Parts

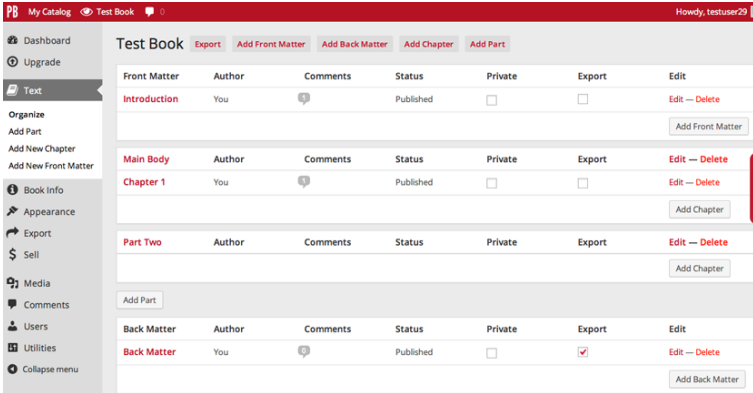
i. Common Parts of a Book

Most books contain at minimum three main parts of a book: Front Matter (things like copyright and preface), Back Matter (things like index and appendices) and the Main Body (the main content of your book, typically made of up chapters, and sometimes parts with chapters).

By default, your book will have these sections set up in the Pressbooks dashboard. Each of these parts of a book is a container to which you may later add as many individual “chapters” as you want. Your book may require different, fewer or more parts than the system default.

Pressbooks allows you to:

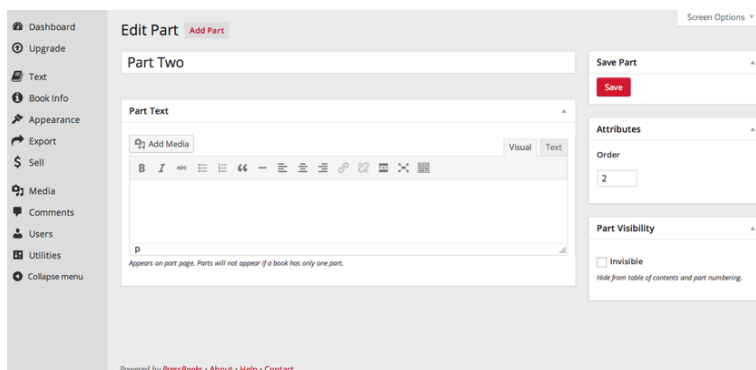
- Add new Main Body parts.
- Delete Main Body parts.
- Rename Main Body parts.



Organizing parts in Pressbooks

To add a new Main Body part:

- Go to Text on the left side of the Dashboard.
- Click on Organize.
- Select the Add Part button (there are three buttons from which you can do this—on the left menu, on the top menu and between the main part of your book and the back matter). Clicking any of these will result in a new Part in the main body of your book.
- Enter the name for your part on the next screen. Ex: Part One.
- Add information about this part, if desired.
- Add a number in the box under Order to designate where your part appears (lower numbers appear higher in the book, closer to the front).
- At this stage, you can choose make the book part invisible, meaning you can use it to organize chapters behind the scenes, but it will not be noted in your book's Table of Contents.
- Click Save.



Editing a part in Pressbooks

To delete a part: NOTE: You cannot delete the front matter or back matter parts of your book, but you can add or delete chapters within these parts, make these parts private or published and choose whether to include them in exports (more on this in Chapters). You can delete Main Body Parts. To do so:

- Click the red Delete button that aligns with the name of the part (Main Body, for example).
- Click OK on the popup that appears.

To rename a part:

- Click on the red Edit button that aligns with the name of the part.
- Edit the title on the page that follows.
- Save.

You can check that your change is reflected by returning to the Organize Text screen from the dashboard.

For a visual intro to parts and chapters, check out our tutorial video.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=128#oembed-1>

PRESSBOOKS

Pressbooks divides your chapters into three sections: Front Matter, body chapters, and Back Matter. You can also choose to divide the chapters in the body of your book into larger Parts. You can access all these options from the **Organize** page. Other chapter settings are available from within the content editor interface.

This chapter will cover:

1. How to Add, Edit, Trash, Restore, or Delete a Chapter
2. Status & Visibility Settings
3. The Visual and Text Editors
4. Parts and Chapter Types
5. Revisions
6. Chapter Metadata
7. Owners
8. Discussion and Comments

1. How to Add, Edit, Trash, Restore, or Delete a Chapter

To add a chapter:

1. Go to **Organize** from the left sidebar menu of your book's

dashboard

2. Click **Add Chapter** either within a part or from the left sidebar menu
3. Create a title and add content if desired
4. Click “Create”

To edit a chapter:

1. Go to **Organize** from the left sidebar menu of your book’s dashboard
2. Click the name of the chapter you’d like to edit
3. Make revisions to the content, the title, or the chapter settings
4. Click “Save”

To trash a chapter:

1. Go to **Organize** from the left sidebar menu of your book’s dashboard
2. Hover over the chapter that you’d like to place in the trash
3. Click “Trash”

You can also trash a chapter from the Status & Visibility menu, explained below.

To restore a trashed chapter:

1. Go to **Organize > Trash** from the left sidebar menu of your book’s dashboard
2. Find the title of the chapter or post you want to restore

3. Click the “Restore” button in the Action column

The post will automatically restore and be accessible from the **Organize** page.

To delete a chapter permanently:

1. Go to **Organize > Trash** from the left sidebar menu of your book’s dashboard
2. Find the title of the chapter or post you want to restore
3. Click the “Delete Permanently” button in the Action column

Once a chapter or any other post type has been permanently deleted, it cannot be restored or retrieved.

2. Status & Visibility Settings

The screenshot displays the Pressbooks 'Edit Chapter' interface for the 'Languages' chapter. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options such as Dashboard, Upgrade, Organize, Book Info, Appearance, Export, Publish, Plugins, Media, Users, Tools, Settings, and Collapse menu.
- Header:** Shows 'Edit Chapter' with 'Add New' and 'Screen Options' buttons. Navigation links for 'Edit Previous (Chapter)' and 'Edit Next (Chapter)' are also present.
- Content Editor:** Features a rich text editor with various formatting tools (Paragraph, Bold, Italic, Textboxes, etc.) and a 'View' button. A blue arrow points from the 'View' button to the 'Status & Visibility' sidebar.
- Overview:** Provides an introduction to the 'Languages' chapter, stating that Pressbooks has three different language settings: Book language, User interface language, and Language script support.
- Status & Visibility Sidebar:** Contains settings for the chapter's visibility and status. The 'Show in Web' checkbox is checked. Other options include 'Require a Password' (unchecked), 'Show in Exports' (checked), and 'Show Title' (checked). It also displays 'Revisions: 28 Browse' and 'Created: Aug 8, 2016 @ 14:37'. Buttons for 'Move to Trash' and 'Save' are located at the bottom of this sidebar.
- Chapter Type:** A dropdown menu showing 'No chapter type'.

In the Status & Visibility menu to the right of the content editor, you will find options to modify the following settings:

- **Show in Web:** Choose whether or not the chapter displays in your public webbook
 - **Require a Password:** Choose whether or not a chapter that is set to display in your public webbook is password-protected
- **Show in Exports:** Choose whether or not the chapter displays in your file exports (ex: PDF, EPUB, and more)
- **Show Title:** Choose whether or not the title for the chapter displays for all formats

NOTE: If your book's global privacy setting is set to "Private" and not "Public," then no chapters will Show in Web. For more information on chapter-level and book-level privacy, see Privacy Settings.

This menu also includes the following options:

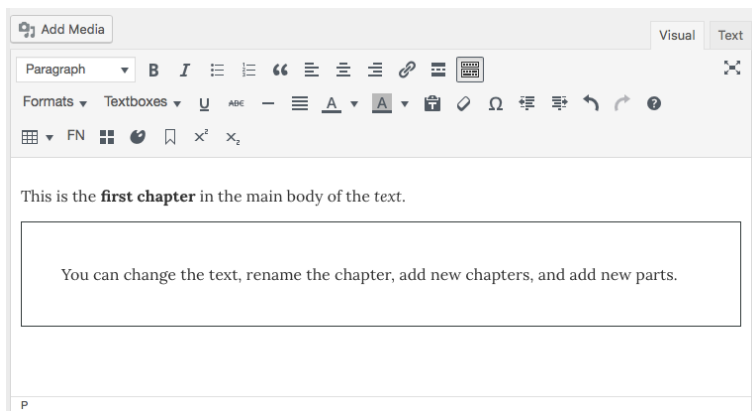
- **Preview:** View how your webbook will look with current changes
- **Revisions:** Browse your revisions to restore a previous version of the chapter
- **Move to Trash:** Remove the entire chapter from your book
- **Save:** Save your changes (**NOTE:** Newly created chapters will have a "Create" button in the place of the "Save" button)

3. The Visual and Text Editors

There are two ways to edit your chapter's content: the **visual editor** and the **text editor**.

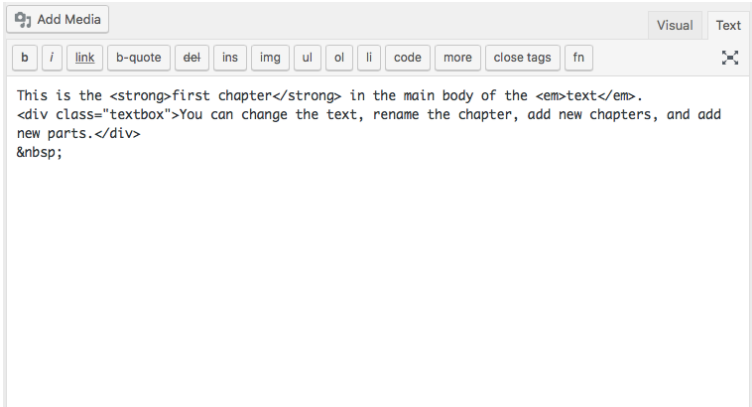
The Visual Editor

The visual editor is a WYSIWYG (what you see is what you get) editor. This editor will emulate the style and display of your exports whenever possible. It also includes a toolbar that allows you to style your text. For more information on the visual editor, see [Visual & Text Editors](#).



The Text Editor

The text editor shows the HTML view of your chapter. What this means is that you'll see all the textual content of the chapter, as well as the tags for any added styles and markup. For more information on the text editor, see [Visual & Text Editors](#).

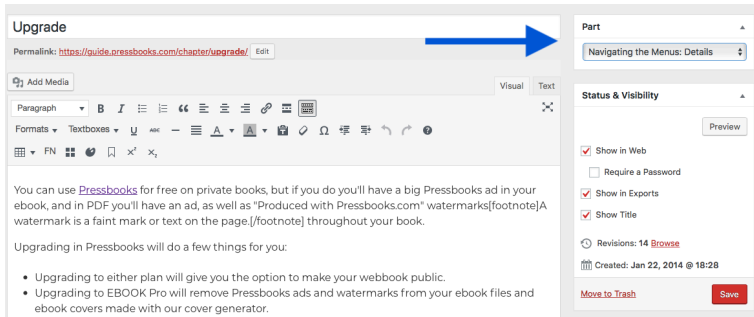


4. Parts and Chapter Types

Two other settings are available to the right of the chapter editor: the Part menu and the Chapter Type menu.

Parts

If your book has multiple Parts within the main body of the book, then you can select which Part a chapter belongs in from the Part menu. Just click the dropdown menu, select the Part you wish the chapter to fall inside of, then save your changes.



Chapter Types

There are three chapter types to choose from:

- **Standard:** A standard chapter will have a chapter title which may include design elements depending on the theme, and includes the chapter number
- **Numberless:** A numberless chapter will not include the chapter's number on the title page, and may not contain other elements included in the standard chapter title page design
- **No chapter type:** This chapter type is the default, and emulates the "Standard" chapter type

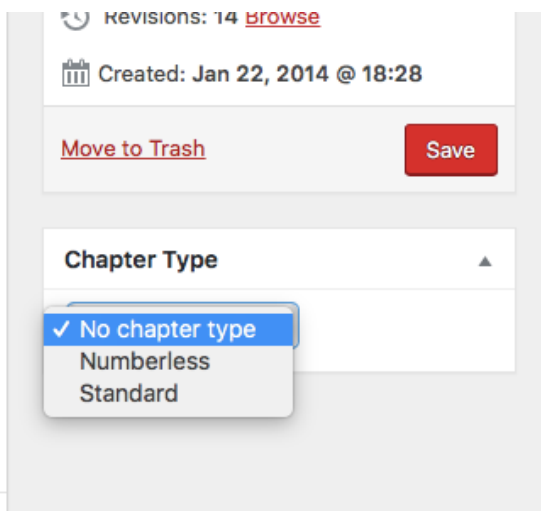
To modify your chapter type, click the dropdown menu and select the chapter type desired. Then, save your changes.

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The screenshot shows a user interface for editing a chapter. At the top, it displays 'REVISIONS: 14' with a 'Browse' link. Below this, it shows the creation date and time: 'Created: Jan 22, 2014 @ 18:28'. There are two buttons: 'Move to Trash' and 'Save'. A dropdown menu titled 'Chapter Type' is open, showing three options: 'No chapter type' (selected with a checkmark), 'Numberless', and 'Standard'.

5. Revisions

All saved versions of your chapter, including autosaves, will be recorded and available in the Revisions menu below the editor interface. Each logged version includes the name of the author who saved the chapter, how long ago it was saved, and a linked timestamp for the post.

Click any timestamp, or the Browse button in the Status & Visibility menu, in order to be brought to the Revisions page for the chapter. From this interface, you can:

- Compare any two saved versions of the chapter by checking the “Compare any two revisions”
- Restore any version of the chapter by navigating on the timeline to the intended version, then clicking “Restore This Revision”
- Click “Return to editor” to be brought back to the chapter editor page

Compare Revisions of "The 5-Step Guide to Using Pressbooks"

[← Return to editor](#) Compare any two revisions

Previous Next

Revision by zoewakehyde
2 years ago (22 Jun @ 20:43) [Restore This Revision](#)

Title	The 5-Step Guide to Using Pressbooks	The 5-Step Guide to Using Pressbooks
Content	<p>Pressbooks is a simple book publishing tool. Put your book content into Pressbooks, edit as you like, and export into ebook and PDF/print-on-demand formats. This chapter will give you a very quick overview of Pressbooks, which can be explored in more detail in the rest of this guide.</p> <p><h2>The (Shortest!) 5-Step Guide to Making a Book with Pressbooks</h2></p> <p></p> <ul style="list-style-type: none"> Register for a Pressbooks account. Add Book Information (title, author name etc). Add/Organize Text (your chapters etc). Choose Book Design Theme (what your book will look like). <p></p>	<p>Pressbooks is a simple book publishing tool. Put your book content into Pressbooks, edit as you like, and export into ebook and PDF/print-on-demand formats. This chapter will give you a very quick overview of Pressbooks, which can be explored in more detail in the rest of this guide.</p> <p><h2>The (Shortest!) 5-Step Guide to Making a Book with Pressbooks</h2></p> <p></p> <ul style="list-style-type: none"> Register for a Pressbooks account. Add Book Information (title, author name etc). Add/Organize Text (your chapters etc). Choose Book Design Theme (what your book will look like). <p></p>

6. Chapter Metadata

The Chapter Metadata section is below the visual/text editor and allows you to add metadata that applies specifically to a chapter rather than to the entire book.

Chapter Metadata ▲

Chapter Short Title (appears in the PDF running header)

Chapter Subtitle (appears in the Web/ebook/PDF output)

Author(s)

x Taylor McGrath
x

[Create New Contributor](#)

Chapter Copyright License (overrides book license on this page)

CC BY-NC-ND (Attribution NonCommercial NoDerivative: ▾)

Note that *book* metadata should be entered in the Book Info page. You'll find the following options available in the Chapter Metadata section:

Chapter Short Title: Enter a shorter version of your chapter's title. You can set the short title to display in the running content

of a book's PDF export. The short title is also used for webbook navigation cues.

Chapter Subtitle: Text entered here will display in your table of contents as well as the chapter title page.

Author(s): If the author of a chapter is different from the author of the book, select the author from the dropdown menu to attribute the chapter to that author. Note that if the author name has not yet been added as a contributor, you can click "Create New Contributor" to add it. When an author is added to the Chapter Metadata, the author name will appear beneath the title of the chapter. The name will also appear in the chapter-level license statement.

Chapter Copyright License: If a chapter has a copyright license which differs from the book's global copyright license, then you can select the chapter copyright license from the dropdown menu. The chapter copyright license will override the book license, but only for that chapter. The chapter-level license will display in the footer of each chapter in the webbook. It can also be set to display in exported book formats when the "Chapter Licenses" setting is enabled in your Global Theme Options.

Every webbook chapter has a chapter-level license statement in the footer regardless of whether a specific chapter license has been chosen. There are four different scenarios:

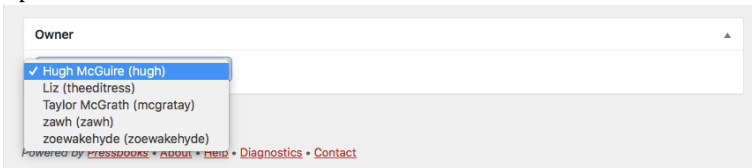
1. **A chapter has a chapter-level author, and a chapter-level license has been selected.** The license statement will read CHAPTER TITLE by CHAPTER AUTHOR.
2. **A chapter has a chapter-level author, and a chapter-level license has not been selected.** The license statement will read BOOK TITLE by CHAPTER AUTHOR.
3. **A chapter does not have a chapter-level author, and a chapter-level license has been selected.** The license statement will read CHAPTER TITLE by BOOK AUTHOR.
4. **A chapter does not have a chapter-level author, and a chapter-level license has not been selected.** The license

statement will read BOOK TITLE by BOOK AUTHOR.

Chapter license also affects cloning. If a public, openly licensed public book contains chapters that are licensed as **All Rights Reserved** or **No-Derivatives**, those closed-license chapters will not clone onto the new network.

7. Owners

If your book has multiple users and collaborators, you can select an owner for the chapter from the dropdown menu in the Owner section. By default, the owner is set to whoever initially created the chapter.



8. Discussion and Comments

By default, comments are disabled globally for your book. Once you've enabled comments globally for your book, you can control chapter-level comment settings in the Discussion and Comments sections.

Discussion

In this section, you can control your comments settings on the chapter level with the following options:

- Allow comments
- Allow trackbacks and pingbacks

Comments

Through this interface, any user with administrative access to the book can leave a comment from within the editor. If any comment has been left on the webbook, administrators can view and moderate comments from this panel.

See Comments and Review for more information.

You may wish to include an Introduction, Acknowledgements or other material before the start of your book. Pressbooks lets you easily format these and other items as front matter in your book, which will appear prior to the main body.

This chapter will explain:

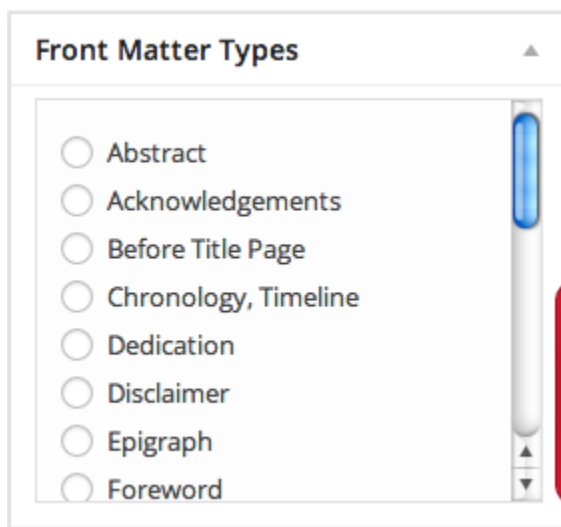
- How to create, edit, delete and change front matter items
- Types of front matter, and how to create them

i. How Front Matter Works

Front matter is the stuff that goes at the beginning of the book – before you get into the meat and potatoes. Front matter can include such things as: Preface, Dedication, Foreword, as well as the Title Page and Copyright page.

Front matter items function similarly to chapters. You can create, edit, delete, rename or reorder front matter items the same way that you would with Chapters, with one additional option.

The Front Matter Types menu lets you indicate an item's type – which may change how it is styled in outputs.



Front matter menu in Pressbooks

2. Types of Front Matter, and How to Create Them

Pressbooks lets you specify 21 types of front matter, including Miscellaneous.

These types are:

- Abstract
- Acknowledgements
- Before Title Page
- Chronology, Timeline
- Dedication
- Disclaimer
- Epigraph
- Foreword
- Genealogy, Family Tree

- Image Credits
- Introduction
- List of Abbreviations
- List of Characters
- List of Illustrations
- List of Tables
- Miscellaneous
- Other Books by Author
- Preface
- Prologue
- Recommended Citation
- Title Page

To indicate front matter type:

- On the Dashboard, go to Text, then Organize.
- Click on Edit next to a front matter item.
- In edit mode, go to the Front Matter Types menu.
- Indicate the item's type.
- Press publish.

PRESSBOOKS

You may wish to include followup materials after the main body of your book. Pressbooks makes it easy to format these as back matter. They will appear after the main body of your book.

This chapter will explain:

- How to create, edit, delete and change back matter items
- Types of back matter, and how to create them
- The order back matter will appear in your book
- How to create indexes, notes and glossaries

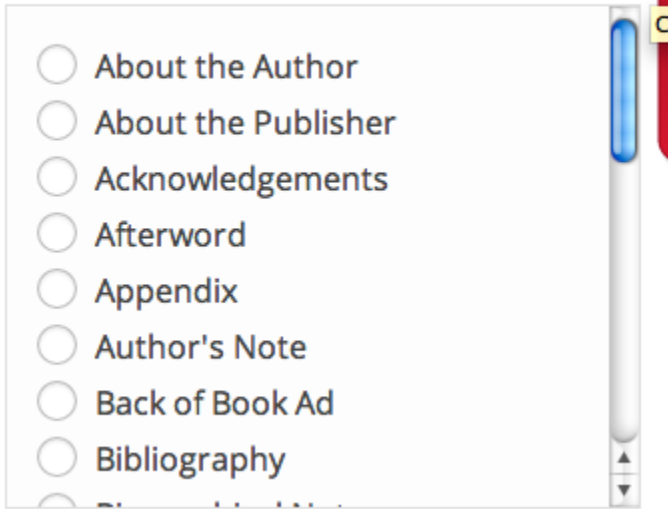
How Back Matter Works in Pressbooks

Back matter is the stuff at the end of your book, after the main sections of the book are finished. Some common items in Back matter include: Epilogue, Index, Bibliography.

Back matter items are essentially chapters within a part, with one additional option to customize.

The Back Matter Types menu lets you indicate an item's type.

Back Matter Types



Back matter menu in Pressbooks

The process to create, edit, delete, rename or reorder back matter items is the same way as that for Chapters, with one additional option.

Types of Back Matter, and How to Create Them

Pressbooks lets you specify 24 types of back matter, including Miscellaneous.

These types are:

- About the Author
- About the Publisher

- Acknowledgements
- Afterword
- Appendix
- Author's Note
- Back of Book Ad
- Bibliography
- Biographical Note
- Colophon
- Conclusion
- Credits
- Dedication
- Epilogue
- Glossary
- Index
- Miscellaneous
- Notes
- Other Books by Author
- Permissions
- Reading Group Guide
- Resources
- Sources
- Suggested Reading

To designate back matter type:

- Go to the Pressbooks dashboard. Click on Text, then go to Organize.
- Press the Edit button adjacent to your desired back matter element.
- On the right of your edit screen, select the correct dropdown in the Back Matter Types menu that applies to the desired type.

Publish by using the Update button.

Back Matter Order

As with front matter, Pressbooks will order your back matter in accordance with the Chicago Manual of Style rules. These mandate the following order:

Acknowledgements (if not in front matter)
Appendix (or first, if more than one)
Second and subsequent appendixes
Chronology (if not in front matter)
Abbreviations (if not in front matter)
Notes
Glossary
Bibliography or References
(List of) Contributors
Illustration Credits (if not in captions or elsewhere)
Index(es)

Indexes and Notes

Currently, Pressbooks is not able to automatically create these pages with links to the corresponding locations in the body of your book. However, it is possible to create these manually using anchor links. To do so:

1. Create your back matter section and add your content
2. Create an anchor link next to each term/entry/endnote by clicking the “Anchor” button on the toolbar and entering a unique identifier
3. Go to the corresponding chapter and find the term you wish to

link to the back matter

4. EITHER:

1. Highlight the text, click on the “Link” icon and enter ‘**/back-matter/[your-section-title]/#unique-identifier**’ OR
2. Insert a number marker using the superscript button on the toolbar (like this¹), highlight the number and create a link as above.

This will create a link to the back matter section, but to also link back to the body text, repeat the same process in reverse, placing the anchor in the body text and the link in the back matter section.

For more on adding end-of-book endnotes, see our guide chapter on endnotes. For more on internal links and anchors, see our guide chapter on hyperlinks.

You can use the Glossary tool to add glossary terms to your webbook, or to generate a full glossary list for all formats. Read on to learn more about:

- Glossary Features and Displays
- Create a Glossary Term
- Create a Glossary List

Glossary Features and Displays

You can create both individual *glossary terms* or a full *glossary list* for your book.

Glossary terms are underlined in your Pressbooks webbook, and display the term definition in a tooltip when clicked.

thither; but Charlotte, she soon found, was depending on the plan and she gradually learned to consider it herself with greater pleasure as well as greater certainty. Absence had increased her desire of seeing Charlotte again, and weakened her disgust of Mr. Collins. The Annoying |velty in the scheme, and as, with such a mother and such uncompanionable sisters, home could not be faultless, a little change was not unwelcome for its own sake. The journey would moreover give her a peep at Jane; and, in short, as the time drew near, she would have been very sorry for any delay.

Users can click the term again or press the *esc* (escape) key on their keyboard to close the tooltip. The tooltip will also close if the user clicks another glossary term on the page.

The *glossary list* displays in all supported formats: webbook, PDF, digital PDF, EPUB, and MOBI. The glossary list is a consolidated,

alphabetized list of all glossary terms which have been selected to show in the glossary list. The design of the glossary list is dependent on the theme and the book format. Glossary definitions can also be styled with links, bold, or italics with the Glossary Term visual editor toolbar. These styles will display in both the glossary list and the tooltip.

Glossary

adieu

Goodbye

diversified

Made different

matrimonial

Pertaining to marriage

twelvemonth

A year

uncompanionable

Annoying

NOTE: To add bold formatting to a glossary term, you must format the **entire shortcode** and not just the term itself in order for the tooltip function to work.

Correct:

```
[pb_glossary id="x"]example[/pb_glossary]
```

Incorrect:

```
[pb_glossary id="x"]example[/pb_glossary]
```

Read on for more details about how to use these features.

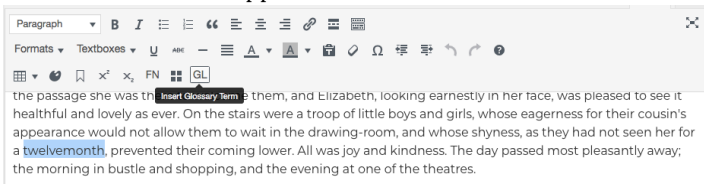
Create a Glossary Term

There are two methods to creating a glossary term. You can either create your terms on the **Glossary Terms** page before you place them in your book, or you can create the terms directly from inside the content editor of your chapter, front matter, or back matter.

From the Content Editor

To create a term:

1. Highlight a word that you want to add a glossary term for, **or** place your cursor where you want the glossary term you have not yet entered to appear
2. Click **GL** on the Visual Editor toolbar. The **Glossary Terms** interface will appear



3. On the **Create and Insert Term** tab, enter your term (**NOTE: If** you've highlighted a word, that word will automatically populate the **Term** field)
4. Add the description for the term
5. Click **Insert**

Glossary Terms

✕

Create and Insert Term

Choose Existing Term

Glossary term *twelvemonth* not found. Please create it.

Term

twelvemonth

Description

A year|

Cancel

Insert

A shortcode will be inserted for your glossary term. If you've highlighted an existing term to give it a definition, the shortcode will wrap around the term. If you've created a new word while adding the glossary term, that word will appear wrapped in the glossary term shortcode.

would not allow them to wait in the drawing-room, and whose shyness, as they had not seen her for a `[pb_glossary id="45"]twelvemonth[/pb_glossary]`, prevented their coming lower. All was joy and kindness. The day passed most pleasantly away; the morning in bustle and shopping, and the evening at one

The shortcode is visible in the visual editor, but is displayed as a functional tooltip in your webbook.

the stairs were a troop of little boys and girls, whose eagerness for their cousin's appearance would not allow them to wait `A year` drawing-room, and whose shyness, as they had not seen her for a `twelvemonth`, prevented their

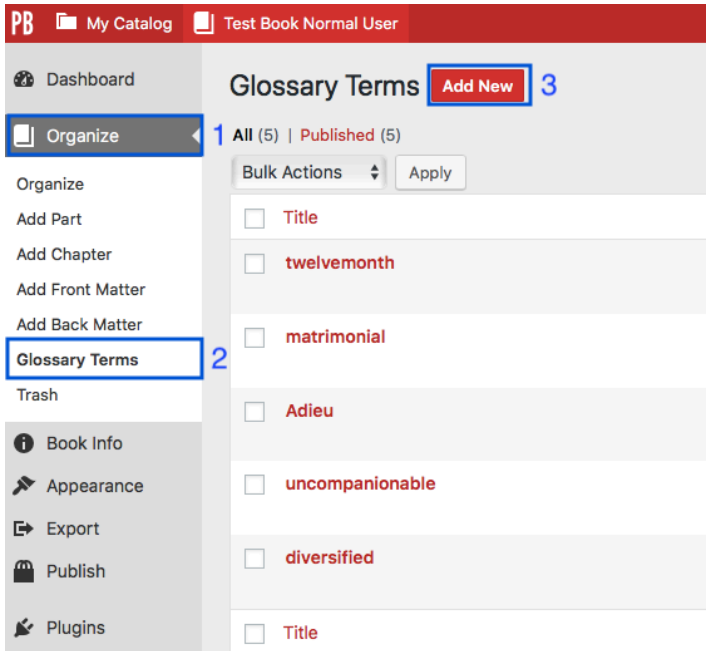
NOTE: Glossary terms inserted with this method will show in glossary lists by default. To remove the term from the full glossary list:

1. Go to **Organize > Glossary Terms**
2. Select the term to access the “Edit Glossary Term” page
3. In the “Status & Visibility” menu, deselect “Show in Glossary Lists”
4. Save your changes

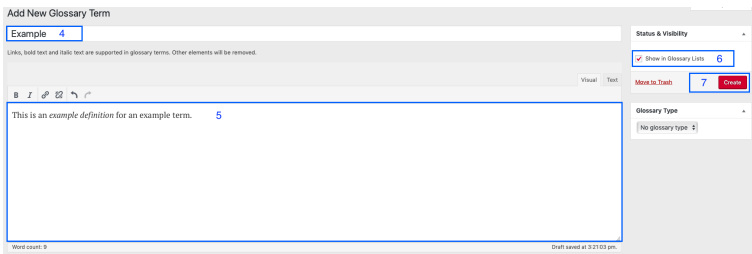
From the Glossary Terms page

To create a term:

1. Hover over **Organize** in the left sidebar menu of Pressbooks
2. Click **Glossary Terms**
3. Click **Add New**



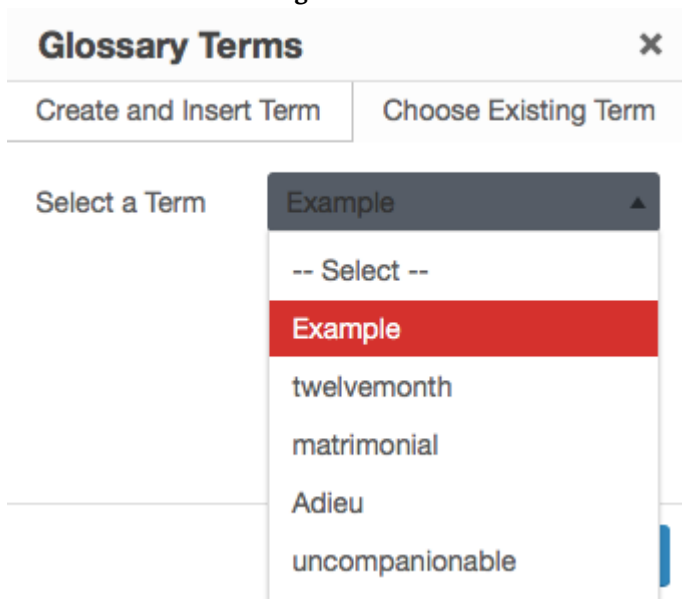
4. Enter a title for your term
5. Create a definition for the term
6. Determine whether or not the term should “Show in Glossary List”
7. Click **Create**



After the term has been created, it can be placed in the content editor. Follow these steps:

1. Highlight the word you are applying the existing glossary term, **or** place your cursor where you want the term to appear

2. Click **GL** on the Visual Editor toolbar to open the **Glossary Terms** interface
3. Select the **Choose Existing Term** tab



4. Select the term from the dropdown menu (**NOTE:** If the text you've highlighted matches the name of an already existing term, the interface will automatically open to the **Choose Existing Term** tab with the matching term selected)
5. Click **Insert**

Glossary Terms ×

Create and Insert Term Choose Existing Term

Select a Term

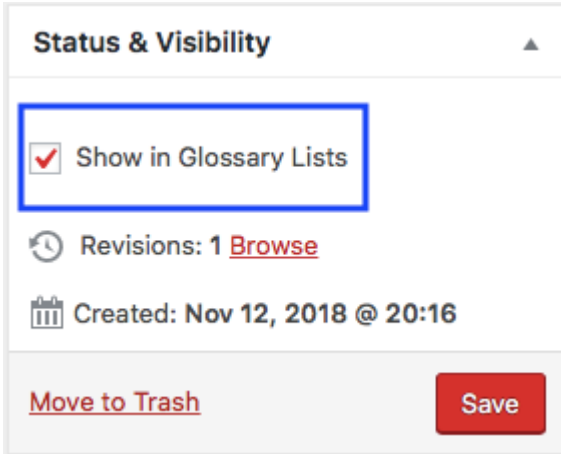
Cancel Insert

NOTE: Unlisted terms, or those not selected to “Show in Glossary List” are still available as glossary terms in the “Choose Existing Term” list.

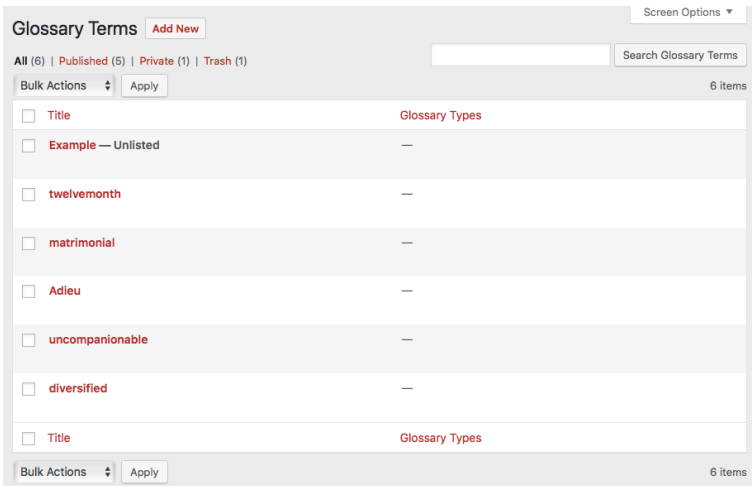
Create a Glossary List

A Glossary List will contain all *listed* glossary terms you’ve created for your book. By default, all terms will be listed. You can choose whether or not a term is listed when creating a new glossary term through the Glossary Terms page, or when editing any existing glossary term. To exclude a glossary term in your glossary list, uncheck “Show in Glossary List” in the Status & Visibility menu on

the glossary term editor page, then save your changes. To include a term in the glossary list, leave this box checked.

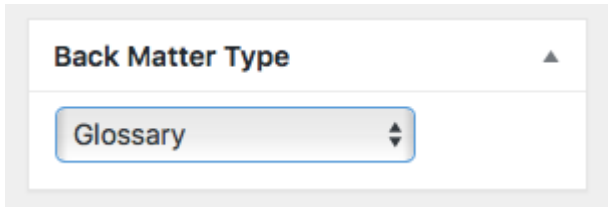


You can see a list of all terms and their listed or unlisted status by going to **Organize > Glossary Terms** from the left sidebar menu of your Pressbooks dashboard.

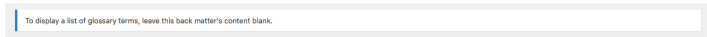


To generate the glossary list, follow these steps:

1. Go to **Organize**
2. Add a Back Matter chapter to your book
3. In the Back Matter Type menu, select “Glossary”



You should see the following message appear at the top of your screen: “To display a list of glossary terms, leave this back matter’s content blank.”



4. Add a title to the back matter chapter
5. Click **Create**

NOTE: You must leave the glossary back matter content blank in order for the glossary to be generated.

The glossary list will be generated and displayed in all supported export formats, as well as the webbook.

Glossary Types

On the “Edit Glossary Term” menu, you’ll notice a menu named “Glossary Type.”

Edit Glossary Term [Add New](#) Screen Options ▾

uncompanionable

HTML and shortcodes are not supported in glossary terms.

Annoying

Status & Visibility ▾

Show in Glossary Lists

Created: Nov 12, 2018 @ 19:41

[Move to Trash](#) [Save](#)

Glossary Type ▾

No glossary type ▾

Word count: 1 Last edited on November 12, 2018 at 7:41 pm

Pressbooks does not support different Glossary Types at this time, and we recommend leaving this menu set to “No glossary type.” However, this functionality may be expanded in future versions of the Glossary tool.

PRESSBOOKS

You can modify the privacy of your book or the chapters within it at any time. Read on to learn about:

- Global Privacy Settings
- Chapter-level Privacy Settings
- Additional Privacy Settings

There are two levels of privacy settings in Pressbooks:

- **Global privacy setting:** Choose whether your entire webbook is Private or Public
- **Chapter-level privacy settings:** Choose whether an individual chapter displays in the webbook

Each of these settings controls if, when, and how your book is displayed to the public. They can also affect what is visible to book collaborators with certain user roles, which you can read about in more detail in [Users & Collaborators](#).

Global Privacy Settings

NOTE: Pressbooks.com users can only access global

privacy settings for their webbook once they've upgraded to any Pro Plan.

The global privacy setting affects whether or not readers can access your webbook on Pressbooks. You can set your book's global privacy to private or public:

- **Private** books can only be accessed and viewed by the administrator of a book and the users that the administrator has added to the book. Setting a book's global privacy to private overrides chapter-level privacy settings.
- **Public** books can be accessed by anyone. When a book's global privacy is set to public, you can adjust the chapter level privacy to control who sees what content.

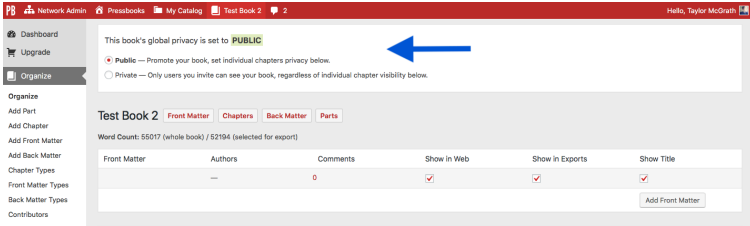
There are two places to set the global privacy for your book:

- The Organize page
- The Sharing & Privacy page

The Organize Page

Most users will visit this page more often. In order to access your global privacy setting here:

1. Click **Organize** on the left-hand menu of your book's dashboard
2. Select "Public" or "Private" in the Global Privacy box at the top of the page

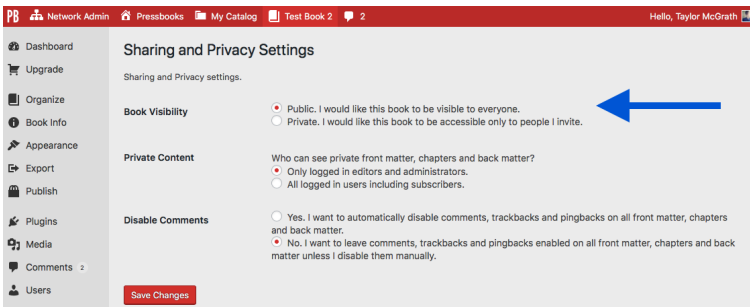


Your choice will be immediately reflected in your webbook.

The Sharing & Privacy Page

The privacy settings for your book are centrally controlled on this page. Beyond global book privacy, you'll see other settings as well, including access to private content and comment activation. To access your privacy setting here:

1. Hover over Settings on the left sidebar menu of your Pressbooks dashboard
2. Click Sharing & Privacy
3. Next to Book Visibility, select “Public” or “Private”
4. Click Save Changes



As mentioned above, books with a global privacy setting of “Public” can still have individual chapters set to “Private.” Read on for more information.

Chapter-level Privacy Settings

Whereas global privacy settings apply to your whole book, you can use chapter-level privacy settings to control who has access to individual chapters within that book. Your chapter-level privacy setting can be set while your book is private but will only apply when your book is public.

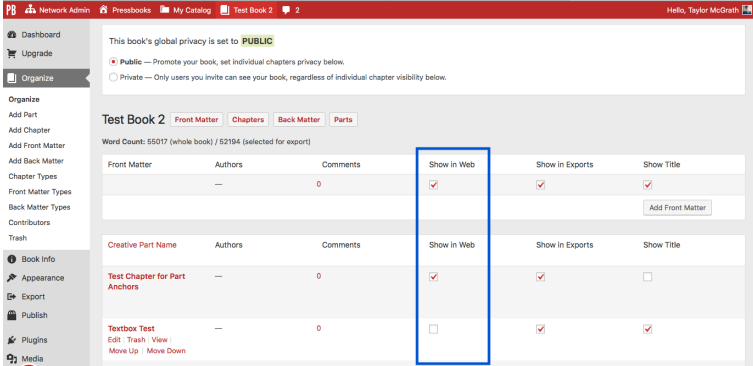
There are two places to control the privacy setting for a chapter:

- The Organize page
- The chapter editor interface

The Organize Page

You can access the chapter-level privacy setting for all chapters at once from the **Organize** page. To modify this setting:

1. Go to **Organize** from the left sidebar menu of your book's dashboard
2. Find the **Show in Web** column for a specific Part, or for the Front Matter or Back Matter
3. Check the box for each chapter that you want displayed to the public in your webbook



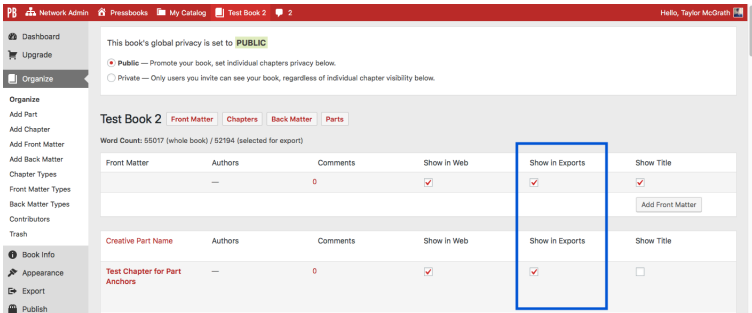
NOTE: You can select or deselect all chapters to show in web by clicking “Show in Web” at the top of the column of whichever Part you are modifying.

The Chapter Editor Interface

You can also modify the “Show in Web” setting from inside the chapter editor interface. This may be more convenient for users who are actively editing a chapter rather than modifying all chapter privacy settings at once.

To access this setting:

1. Access a chapter of your book in Pressbooks
2. Find the **Status & Visibility** box to the right of the chapter editor
3. Select or deselect the “Show in Web” box according to your preferences
4. Click **Save**



Require a Password

You can use the Password Protection setting to limit access to individual chapters in your public webbook while still allowing the public to access the book itself.


Users may choose this option in order to give access to a large group of individuals for pre-release or peer review before a webbook is made public.

For more information on how to enable password protection for individual chapters in your book, visit the Users & Collaborators chapter of our user guide: <https://guide.pressbooks.com/chapter/users/>

AUTHORING DASHBOARD

OER PRODUCTION TEAM

Select the blue “i” cons in the following image to explore the admin interface in Pressbooks.

	Last update: Apr 16/20
 An interactive H5P element has been excluded from this version of the text. You can view it online here: https://openbook.ums.edu.my/iotb/?p=175#h5p-4	

Once an account and book have been created in Pressbooks, the Dashboard or **Dashboard page** is where the account holder is directed after logging in. The account holder is also automatically assigned as the **Administrator** and has access to all functions listed on the Dashboard. Lesser roles, such as **Editor**, **Author**, **Contributor**, and **Subscriber**, do not see/access all of these tools. (See Provide Access to Others.)

The Dashboard is also where an author will spend most of their time writing and where links to various tools and functions can be found. This chapter provides an overview of the Dashboard.

IMPORTANT: If you have been assigned a user role other than Administrator, you will not have access to the “Users” or “Settings” panels.

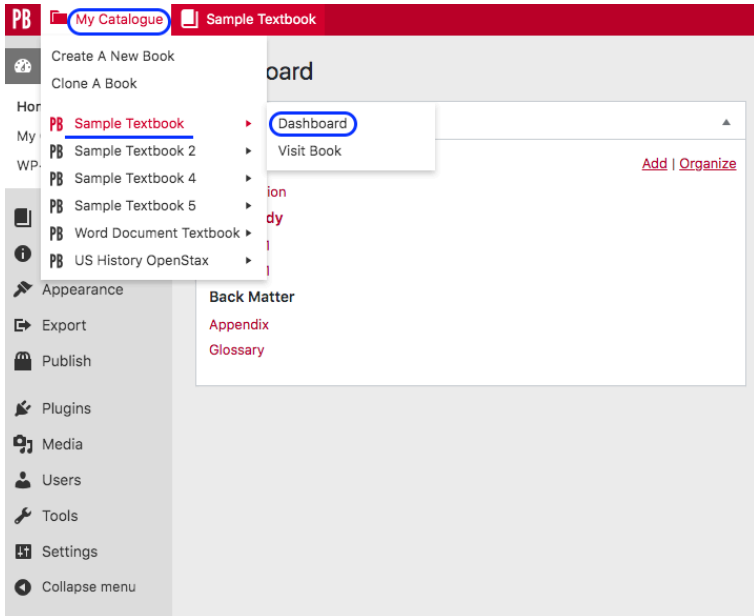


For more information, see Navigating the Pressbooks Menus in the *Pressbooks User Guide*.

My Catalogue

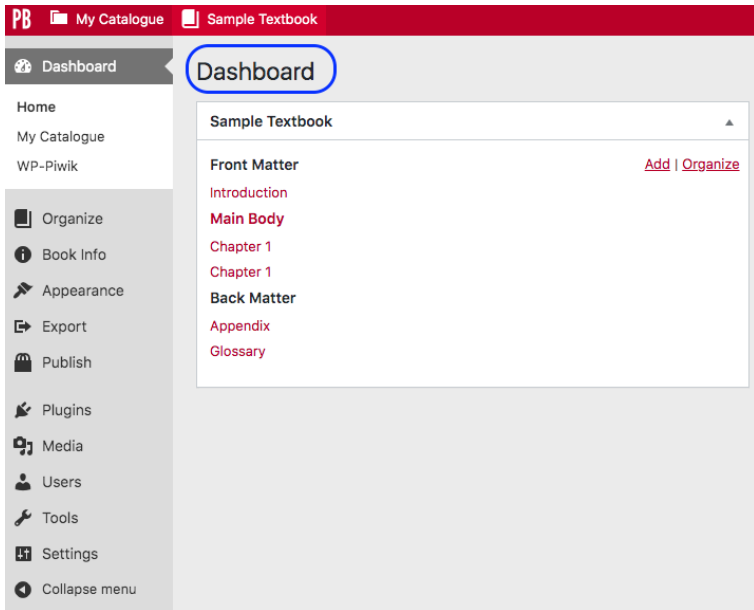
The **My Catalogue** link in the top red toolbar allows you to create a new book, clone a book, and see and select all books in your Pressbooks Catalogue. (See Add a New Book and Clone a Book.) You can also locate the Dashboard for a specific book as follows:

- Scroll over “My Catalogue.”
- Select the arrow by a book.
- Select “Dashboard” to access the **edit view**.
- Select “Visit Book” to access the **webbook** or **reader view**.



On a book’s Dashboard, various tools are listed in the left-hand column **Dashboard menu**, the parts and chapters of the book are in

the middle, and users who have access to the book are shown in a Users box on the far right.



For more information, see My Catalog in the *Pressbooks User Guide*.

Most major Pressbooks features are found on the Dashboard menu. These are described below.

Organize



For more information, see [Organize](#) in the *Pressbooks User Guide*.

Book Info



For more information, see [Book Info](#) in the *Pressbooks User Guide*.

Appearance

Themes

Pressbooks core has created 20 themes, each with different styles (font, headings, etc.) and features. These can be viewed and activated from navigating to the Appearance tab in the Dashboard menu and clicking “Themes.” Scrolling over a specific theme option reveals a Theme details box that, when clicked, describes the theme.

The BCcampus instance of Pressbooks provides seven of the 20 themes. They are:

- Austen Classic
- Clarke
- Donham
- Fitzgerald
- Jacobs
- Luther
- McLuhan



For more information, see [Selecting Your Book Theme](#) in the *Pressbooks User Guide*.

Theme options



For more information, see Theme Options in the *Pressbooks User Guide*.

Recommended PDF Theme Options

While most of the theme options are completely up to your preference, we recommend the following settings to ensure your PDF displays well:

- Page size: US Letter
- Paragraph separation: Skip lines between paragraphs

Custom styles



For more information, see Custom Styles in the *Pressbooks User Guide*.

The following are Custom Styles that BCcampus applies to books we publish: BCcampus Custom Styles for Pressbooks Books

Export



For more information, see Export in the *Pressbooks User Guide*.

Publish

This page offers a list of BUY link with various eBook stores and print-on-demand vendors.

Plugins

This page lists the three plugins that can be activated within the BCcampus Pressbooks instance. (See Plugin Features.)

Media

The **Media** tab is where all media for a book—images, videos, audio—are uploaded. Click “Add New” to upload media content or click “Library” to see and manage media you have uploaded previously. Media in the Library can be embedded or linked to in the content of your book. (See Images and Files and Media Attributions.) It has the following options:

- Library
- Add New



For more information, see [Media: Images & Best Practices and Image Editing in the *Pressbooks User Guide*](#).

Users

The **Users** tab is where a book Administrator can add other people to their book. (See Provide Access to Others.) It has the following options:

- All Users
- Add New
- Your Profile

Tools

- Import: Pulls content into Pressbooks from various file types. (See Add Content.)
- Search & Replace: Allows importing of content—an entire book or individual chapters—from books in any Pressbooks instance. (See Search and Import a Pressbooks File.)



See Search and Replace and Search and Replace in the *Pressbooks User Guide*

Settings

The **Settings** tab contains numerous options for privacy and exporting and for displaying formulas with the MathJax tool (used for rendering mathematical formulas).

- Sharing & Privacy



See Privacy Settings: Global and Chapter-level in the *Pressbooks User Guide*.

- Export (See Export Files.)
- MathJax



See Math in Pressbooks in the *Pressbooks User Guide*.

The below videos are from the Pressbooks Video Tutorial Series.

[https://media.bccampus.ca/id/](https://media.bccampus.ca/id/0_1uad0m9q?width=608&height=402&playerId=23449753)

[0_1uad0m9q?width=608&height=402&playerId=23449753](https://media.bccampus.ca/id/0_1uad0m9q?width=608&height=402&playerId=23449753)

[https://media.bccampus.ca/id/](https://media.bccampus.ca/id/0_ev5h3o73?width=608&height=402&playerId=23449753)

[0_ev5h3o73?width=608&height=402&playerId=23449753](https://media.bccampus.ca/id/0_ev5h3o73?width=608&height=402&playerId=23449753)

[https://media.bccampus.ca/id/](https://media.bccampus.ca/id/0_8tfvsglp?width=608&height=402&playerId=23449753)

[0_8tfvsglp?width=608&height=402&playerId=23449753](https://media.bccampus.ca/id/0_8tfvsglp?width=608&height=402&playerId=23449753)

[https://media.bccampus.ca/id/](https://media.bccampus.ca/id/0_2ow9hwec?width=608&height=402&playerId=23449753)

[0_2ow9hwec?width=608&height=402&playerId=23449753](https://media.bccampus.ca/id/0_2ow9hwec?width=608&height=402&playerId=23449753)

The **Organize** menu acts as the heart of your book. This is where you can draft, edit, reorganize, and breathe life into the content of your book. From here, you can add new parts, chapters, front and back matter, and all the other types of content for your book.

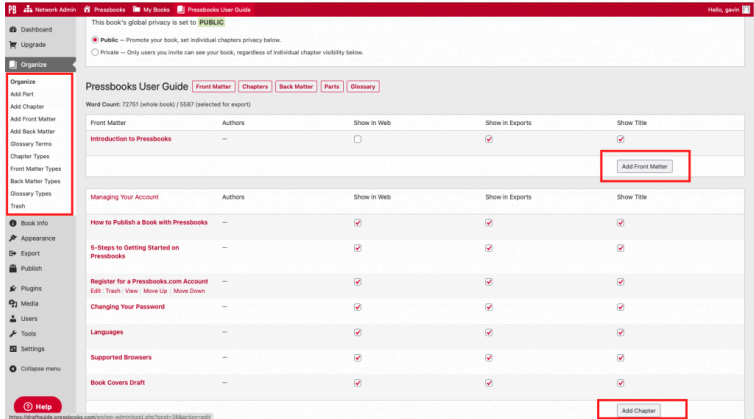
In this chapter we will cover:

- Navigating the Organize Menu
 - Adding a New Section
 - Editing, Viewing, and Reordering Sections
 - Book Privacy and Exporting
- Related Chapters

Navigating the Organize Menu

The dashboard of the **Organize** menu offers an overview of the structure and content of your book. The view shows you the front & back matter, parts, and chapters of your book you have created and is the main portal to edit and rearrange parts of your book. You can access this dashboard by clicking **Organize** in the left sidebar in Pressbooks.

The display is separated into sections to display your Front Matter first, then all of the Parts and Chapters of your book, followed by the Back Matter at the bottom.



Adding a new section

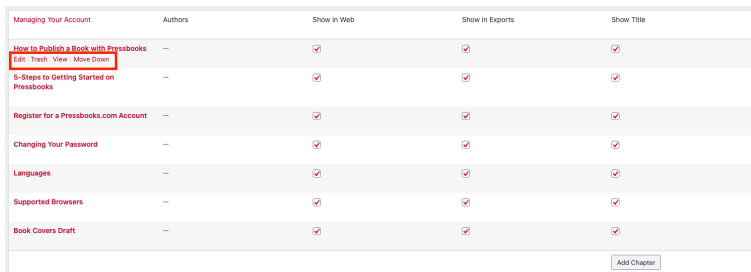
Creating a new section of your book is simple, with two options in the **Organize** menu.

1. The first is the **Add Chapter** button in the bottom right corner of each section; for example, in the screenshot above, there is a button to **Add Chapter** at the end of the Part titled “Managing Your Account”. Similar buttons will be found for other content types like Front and Back Matter throughout your Organize page.
2. The second is to choose the corresponding menu from the left sidebar underneath **Organize**. Here you will find options to add new Parts, Chapters, Front and Back Matter, and more.

For more information on adding new sections to your book as well as the different types available, please refer to additional chapters on these topics.

Editing, Viewing, and Reordering Sections

You can access controls to edit, view and reorder sections quickly by hovering your mouse over a section of your book in the **Organize** dashboard.



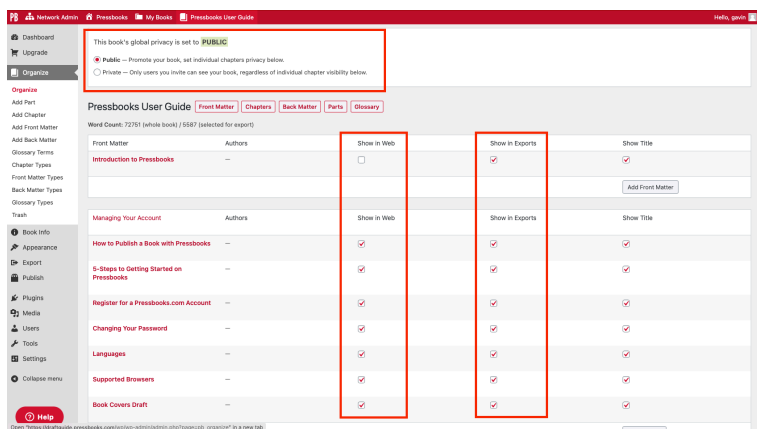
Managing Your Account	Authors	Show in Web	Show in Exports	Show Title
How to Publish a Book with Pressbooks Edit Trash View Move Down	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5-Steps to Getting Started on Pressbooks	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Register for a Pressbooks.com Account	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Changing Your Password	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Languages	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Supported Browsers	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Book Covers Draft	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Editing: To edit a section of your book, hover your mouse over the section and click **Edit** or click on the section title to bring up the Visual and Text Editors. To learn more about the Edit screen, please refer to additional chapters on this topic.

View: To quickly see what how your book section appears in its webbook format, hover over a section and click **View**.

Reorder: To change the order of section in your book, you can hover your mouse over a section and click the **Move Up** or **Move Down** controls to move the section one step higher or lower within the order. You can also click and drag sections to quickly reorder content, and this especially helpful when moving Chapters between different Parts of your book.

Book Privacy and Exporting



The **Organize** menu offers quick access to controls to change both the parts of your book that appear in your webbook as well as in any exported files you create for your book

Global Privacy: The global privacy menu at the top of the **Organize** page allows you to change whether your book is public or private across the entire book, which can be useful tools if you are still in the process of drafting your book and only want to show the finished product.

Show in Web: Each book section you create includes a check box in the “Show in Web” column, allowing you to choose if any given section appears as part of your webbook online. You might want to hide a single chapter if you are making substantial edits or adding a brand new chapter to an existing book. Clicking on “Show in Web” at the top of the column selects all of the check marks below.

Show in Exports: Similar to how you can choose which sections of your book appear in the webbook, you can also choose which sections are included in any export files you create, such as print and print-on-demand PDFs, EPUB, or MOBI files. Clicking on “Show in Exports” at the top of the column selects all of the check marks below. For more information on exporting your book, please refer to additional chapters on these topics.

Related Chapters

For more information on the concepts presented in this chapter, please refer to the following complementary or related chapters:

Adding Content	Editing Content	Book Privacy & Exporting
Parts	Visual & Text Editors	Privacy Settings: Global & Chapter-level
Chapters		Export Menu
Front Matter		PDF Export & Options
Back Matter		EBook (EPUB + Mobi) Export
Glossaries		
How to Get Your Book into Pressbooks		

PRESSBOOKS

The Book Info page is where you enter all the metadata about your book. This includes information such as the book's various contributors, the copyright license you've chosen, the ISBN associated with your book, and more.

In this chapter we will cover:

- Book Info
 - General Book Information
 - Cover
 - Subject
 - Copyright
 - About the Book
 - Additional Catalog Information
- Contributors
 - Creating a New Contributor
 - Adding a Contributor to Your Book
 - Editing a Contributor

Book Info

In Pressbooks, the **Book Info** page is where you put information *about* your book. In the book publishing industry, this is called “metadata”—or, data about the data. Metadata allows book stores

and libraries categorize a book and make it easier for readers to find. It answers questions such as: *What is the title? Who is the author? When was it published? And what is the book about?*

Some pieces of metadata are required and will be filled in by default using the information you entered when you first registered your account and created a book. This information is used for the following purposes:

1. To meet the metadata requirements of ebook sellers for your EPUB and MOBI files
2. To automatically generate certain pages in your book, including the cover, title page, and copyright notice
3. To build a book landing page on the web (read more)

We recommend adding as much information as you can when creating digital publications like webbooks, EPUBs, or MOBIs, though it is not necessary to fill out every single section of the Book Info page. You can choose to enter whatever information fits your needs for your project.

General Book Information

This section includes basic information about your book.

Required information	Optional Information
Title	Short title
Author	Subtitle
Language	Editor, Translator, Reviewer, Illustrator, and Contributor
	Publisher
	Publisher City
	Publication Date
	On-sale Date
	Ebook ISBN (International Standard Book Number)
	Print ISBN (International Standard Book Number)
	DOI (Digital Object Identifier)

Title: Pressbooks will automatically fill in this section with the title that you first chose when you created the book, though it can be edited using this field. The title will be included in your automatically generated title page, half-title page, and webbook homepage. It may also be in the running content of your PDF files. The title is also **required** for the metadata that goes into your EPUB file.

Short Title: A shorter version of your title can be entered if your full book title is too long for the running content in your PDFs. This field is **optional**.

Subtitle: Like the title, this information will automatically populate the title page and webbook homepage if entered. The use of a subtitle is **optional**.

Author: The author name is used to populate the automatically generated title page and webbook landing page. It's also included in the metadata file in your ebook. This field is **required**, and will default to your Pressbooks username if nothing is entered.

Editor, Translator, Reviewer, Illustrator, and Contributor: These metadata fields can be filled in to properly credit the contributions

of individuals who filled specific roles in the creation of the book. All contributor fields except for Author are **optional**. Click here to learn how to add new contributors.

Publisher: Publisher information will appear on the automatically generated title page in exported files and on the webbook homepage. The metadata will also be included in your ebook files. This field is **optional**.

Publisher City: Publishing conventions list the city or cities where the publisher operates on the title page of a book. The publisher city will be included in the automatically generated title page in exported files and on the webbook homepage. This field is **optional**.

Publication Date: The date the book is to be, or was published on. The publication date will be included on the webbook homepage. This field is **optional**.

On-sale Date: The date the book will go on sale. This field is **optional**.

Ebook ISBN: An ISBN or “international standard book number” is a number assigned to your book that is unique, and it allows all bookstores across the world to know certain important things about your book, including: title, author, publisher, publication date. The ebook ISBN is added to the metadata file in your ebook, and is included in the webbook homepage. This field is **optional** on Pressbooks, but may be required by your ebook distributor. For more details on how to acquire an ISBN, see our Guide to Self-Publishing.

NOTE: Requirements for ISBNs are dependent on the country in which you live or publish the book. Be sure to check what’s required for your country before you purchase your ISBN.

Print ISBN: See above for a description of ISBNs. Note that each

format of a book (print, ebook, audiobook) must have its own ISBN. This field is **optional**.

Digital Object Identifier (DOI): Insert your book’s DOI, a handle used to uniquely identify digital objects. DOIs are commonly used for academic publications. The DOI will display in the Metadata section of the webbook homepage. The DOI field is **optional**.

Language: Set the language of your book and its metadata. Changing the language of a book changes certain automatically generated terms throughout the book, including words like “Chapter” or “Contents”. Language strings may not change if they have not yet been translated into your chosen language in our system. The book’s metadata language will also affect your Pressbooks interface language if your user profile Language setting is set to Site Default. For more information, see our guide chapter on Languages. This field is **required**, and defaults to English.

Cover

Upload an image of the front cover of your book in this section. The cover image will display in the following locations:

- EPUB files
- MOBI files
- The webbook homepage

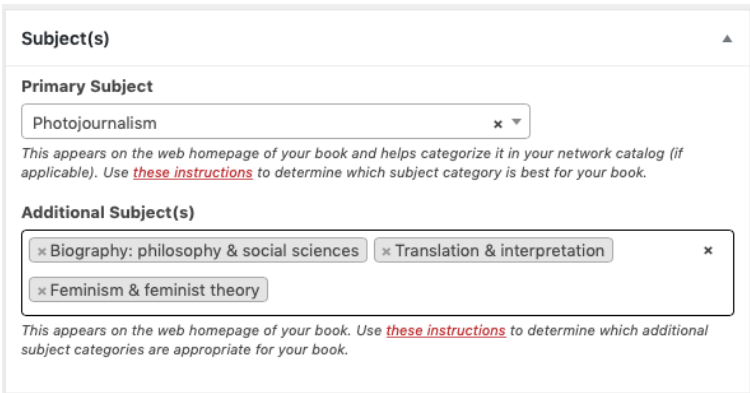
Cover images should have a 1:1.5 aspect ratio. Recommended dimensions are 2500px by 3750px. The maximum upload size of images is 2MB. Adding a cover image is optional; however, the Pressbooks logo will be displayed by default if you do not include a custom cover.

NOTE: The cover image is **not** included in print or digital PDF files. PDF files are designed as interior files only, as many print and print-on-demand services require cover files to be submitted separately.

Subject

Adding **optional** subject categories to your book can help with search engine optimization (SEO), especially if your focus is primarily on distributing a public webbook on Pressbooks. These subject categories can also be used to sort your book on the public Catalog page of any PressbooksEDU network.

Subject categories are built on EDItEUR's Thema standards, a subject category scheme for the global book trade.



Subject(s)

Primary Subject

Photojournalism

This appears on the web homepage of your book and helps categorize it in your network catalog (if applicable). Use [these instructions](#) to determine which subject category is best for your book.

Additional Subject(s)

× Biography: philosophy & social sciences × Translation & interpretation ×

× Feminism & feminist theory

This appears on the web homepage of your book. Use [these instructions](#) to determine which additional subject categories are appropriate for your book.

The **Subject** panel on the Book Info page

Copyright

A copyright notice is **required** for all books. Pressbooks generates a default copyright notice for all book formats, which will include your book's title and the author name and set the copyright license to All Rights Reserved.

You can add the following information in the Copyright section to include in the automatically generated copyright notice:

- Copyright year
- Name of the copyright holder
- Copyright license (including Creative Commons (CC) licenses, which allow copyright holders to grant others free permissions to use their work in various ways)

You can also create a custom copyright notice that overrides the default notice created by Pressbooks. Any content entered into **Copyright Notice** section will override the automatically generated statement when an All Rights Reserved license is chosen, or be added to the generated statement when another license is chosen.

For more information, see the guide chapter Copyright Page.

About the Book

Descriptions explaining what your book is about will be included on the webbook homepage and in the metadata of your ebook files. All information in this section is optional to include.

Book Tagline: This is a very short, one-line sentence that explains why someone should read your book. Ideally, the tagline is something that would fit in a tweet.

Short Description: A short paragraph describing your book. Think

of this as the description you would read on a catalog page with ten other books.

Long Description: A longer paragraph about your book that can also include reviews, praise, blurbs, etc.

Additional Catalog Information

Click the **Show Additional Book Information** button at the top of the Book Info page to open the Additional Catalog Information section. Enter more **optional** information about your book:

- Series title
- Series number
- Editor
- Translator
- Keywords
- Hashtag
- List price
- BISAC Subjects

For a quick overview on adding your book metadata in Pressbooks, watch this video on adding metadata using Book Info.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=189#oembed-1>

Contributors

Contributors are anyone who had a role in the creation of the book. In Pressbooks, contributor roles are assigned on the Book Info page and include the following: **Author**, **Editor**, **Translator**, **Reviewer**, **Illustrator**, and **Contributor**.

Author(s)

× Taylor McGrath

× Hugh McGuire

× Liz Mays

×

Create New Contributor

Editor(s)

× Steel Wagstaff

×

Create New Contributor

Translator(s)

Choose translator(s)...

Create New Contributor

Reviewer(s)

× Daniel Fernandes

×

Create New Contributor

Illustrator(s)

Choose illustrator(s)...

Create New Contributor

Contributor(s)

Choose contributor(s)...

Create New Contributor

Different contributor roles include Author, Editor, Translator, and more. Each contributor role can have multiple contributors listed.

Before a contributor can be added to the fields on the Book Info page for the roles above, however, the contributor name must first be added to your book from the **Contributors** page.

Creating a New Contributor

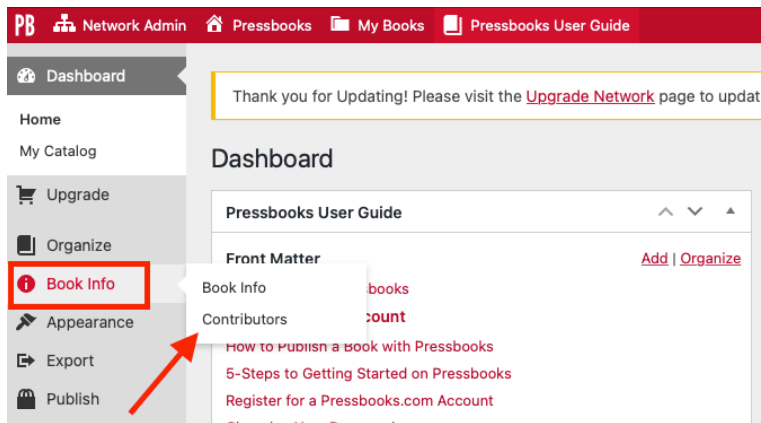
There are a few ways to access the Contributors page, depending on where you are in Pressbooks.

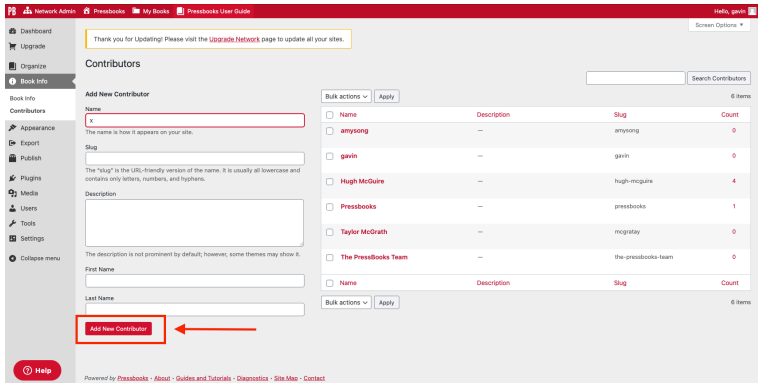
From the left sidebar menu: Hover over **Book Info** and select **Contributors**.

From the Book Info page: Click **Create New Contributor** under any contributor role.

From the chapter editor: Scroll down to “Chapter Author(s)” and click **Create New Contributor**.

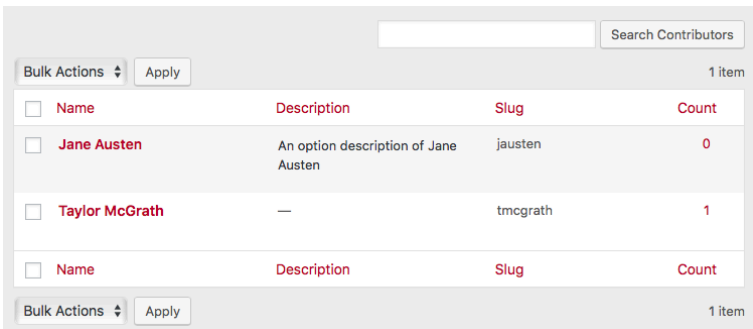
1. In the “Add New Contributor” section, fill in the name and other details of your contributor.
2. Click **Add New Contributor**.





Adding a Contributor to Your Book

Add the new Contributor to its designated role from the **Book Info** page. All contributors you've created are available in a contributor list.



Whenever you click inside the cell for a contributor role on the Book Info page, all names in your contributor list will be available from the dropdown menu.

Editor(s)

Choose editor(s)...
Jane Austen
Taylor McGrath

Choose translator(s)...

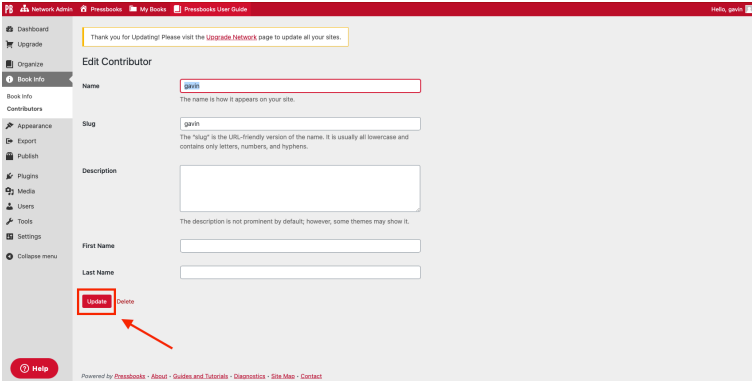
Create New Contributor

Select the name of contributor you want to designate for a given role. Then, save the **Book Info** page. The name will be added to the front matter or Book Info section for each book format.

Editing a Contributor

To edit a contributor, follow these steps:

1. Navigate to the Contributors page (**Book Info > Contributors**).
2. In the contributor list, click the name of the contributor you'd like to change. You'll be brought to the "Edit Contributor" page for that contributor.
3. Make the change.
4. Click **Update**.



NOTE: You must re-save the Book Info page after you've changed the information for a contributor in order for changes to take effect in your book.

The Appearance tab is where you make choices that affect how your book is designed, including a base theme template for your book which determines the display of fonts, headings, chapter titles, and other basic elements.

In this chapter we will cover:

- Themes
 - How to Change a Theme
- Theme Options
 - Global Options
 - Web Options
 - PDF Options
 - Ebook Options
- Custom Styles

Themes

Themes are the base of the design for your book. Pressbooks offers 20 different themes, tailor-made to suit a wide array of specific genres.

The elements directly impacted by your choice in theme include but are not limited to:

- Chapter title designs
- Running content
- Fonts
- Heading styles
- Pullquotes
- Textboxes
- Blockquotes
- Title page layout
- Copyright page layout
- Table of contents layout

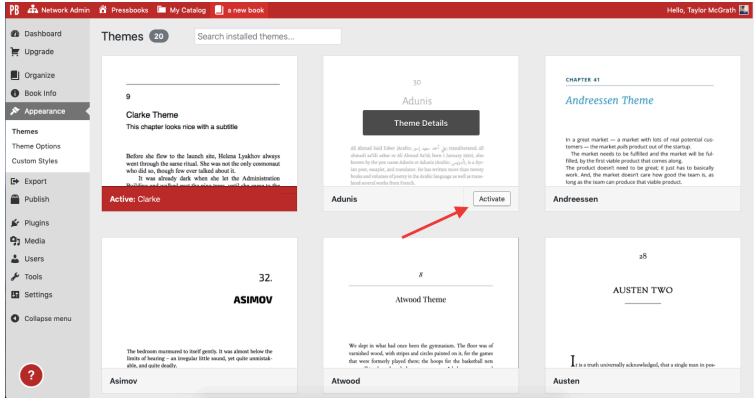
There are many other elements that you can customize within any theme, and we'll cover those options in the next section. The theme you choose applies every supported file format you chose to publish, including EPUB, MOBI, PDF, and webbook. The design will look as similar as possible across all formats.

How to Change a Theme

When you first create a book, a theme will already have been applied to the book. For most networks, the default theme is McLuhan. You can change your book's theme by following these steps:

1. Go to **Appearance > Themes** from the left sidebar menu in Pressbooks.
2. Hover over any of the 20 themes on the Themes page.
3. Click **Activate**.

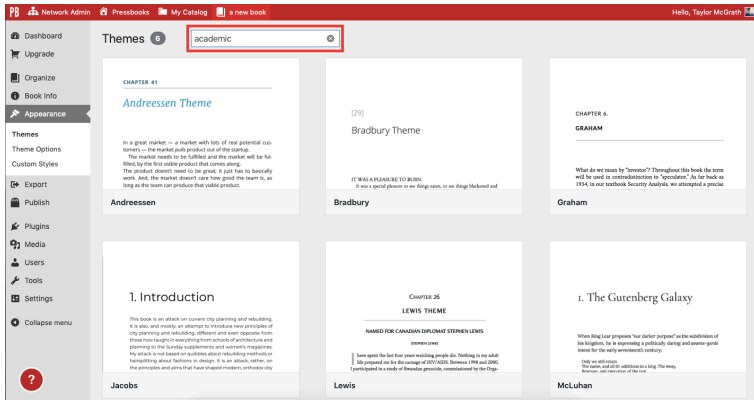
The Theme page will reload, and you should see a banner at the top that reads “New theme activated.” Your webbook and newly exported files will now reflect the new theme.



Choosing a Theme

Pressbooks offers many different themes for many different genres. You can see examples of the chapter title page for each theme on this page to get an idea of what the book you produce will look like. We also have a few features in place to help you choose which theme is right for your book.

Searching for Themes: You can use the Search function at the top of the Themes page to find themes that match the terms you'd use to describe your genre. For example, try searching “academic” to see all the themes that were designed with academic texts in mind.

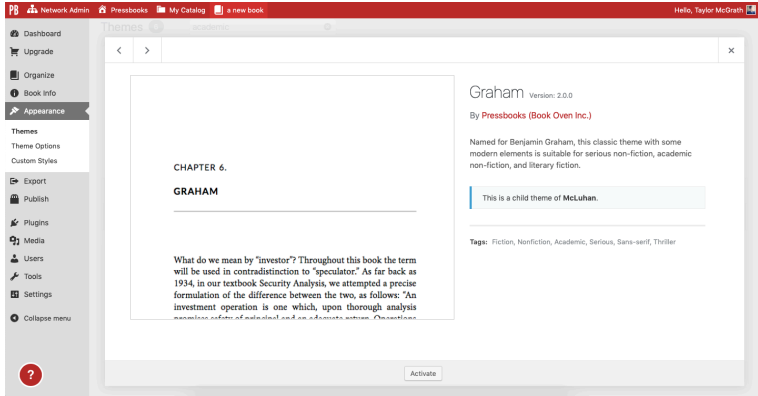


Themes are tagged with one or more of the following searchable attributes:

- Academic
- Literary
- Nonfiction
- Textbook
- Genre fiction

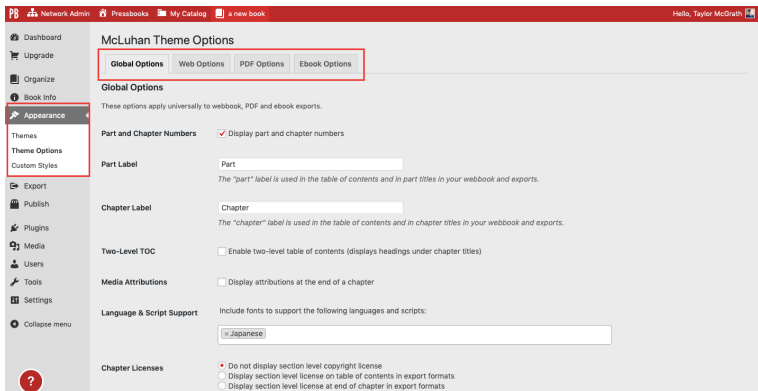
The “genre fiction” tag would include designs that work well for romance novels, thrillers, mysteries, fantasy, or science fiction. Many themes are well suited to both fiction and nonfiction.

Viewing Theme Details: Hover over any theme on the Themes page and click the Theme Details button to see more information about the theme. This will include details such as the genres the theme is designed for, what version the theme has been updated to, and why the theme is named the way it is.



Theme Options

While every theme is equipped with sensible defaults, you can customize the way that your book looks on any theme with additional Theme Options. To access the Theme Options settings, go to **Appearance > Theme Options** from the left sidebar menu of your book's dashboard.



Theme Options are split into four sections:

- Global Options

- Web Options
- PDF Options
- Ebook Options

NOTE: Not all themes offer all theme options. Only the most updated themes will offer all the options you see below.

Global Options

Global Theme Options are settings that will affect the display of all book formats, including your webbook, ebook, and PDF. Below are the settings currently available as Global Theme Options on updated themes.

Part and Chapter Numbers: Enable or disable the display of part and chapter numbers in all formats. Enabling this setting serves as an alternative to choosing Chapter Type “Numberless” for every chapter.

Part and Chapter Labels: Choose a custom section label for the parts and chapters of your book. For example, call parts “Units” and chapters “Sections.” These sections will still be referred to as Parts and Chapters in the back end of Pressbooks, but in your book they will display as “Units” and “Sections.”

Part Label	Unit
<small>The “part” label is used in the table of contents and in part titles in your webbook and exports.</small>	
Chapter Label	Section
<small>The “chapter” label is used in the table of contents and in chapter titles in your webbook and exports.</small>	

Two-Level TOC: Add a second level to your table of contents by enabling the two-level TOC setting. With this setting on, all headings tagged with the Heading 1 paragraph style will be added as subsections to a chapter on the table of contents.

Media Attributions: Display media attributions at the end of any chapter that contains media with attribution metadata included. Click here to learn more about media attributions.

Language & Script Support: Add a new language script to your book to make sure the fonts display correctly in all formats. Click here for a list of supported scripts.

Chapter Licenses: Choose whether to display chapter licenses on the table of contents, at the end of a chapter, or not at all. Note that this will only affect export formats, and only if the book contains chapters with separate licenses than the overall book license. Click here to learn more about chapter licenses.

Education-themed Textboxes: Customize the header color, header background color, and textbox background color for education-themed textboxes, including **Examples**, **Key Takeaways**, **Learning Objectives**, and **Exercises**.

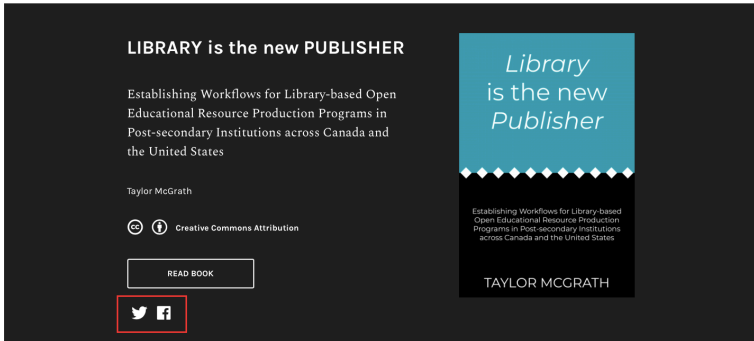
Web Options

Web Options are settings that will only affect the display of your webbook. Below are the current Web Options available on updated themes.

Header Font: Change the theme's default header font to one from an available list of open-source typefaces. Both serif and sans serif fonts are available. (**NOTE:** This option is currently only available on the Malala theme.)

Body Font: Change the theme's default body font to one from an available list of open-source typefaces. Both serif and sans serif fonts are available. (**NOTE:** This option is currently only available on the Malala theme.)

Enable Social Media: Add social media icons to your webbook's homepage and each chapter so that readers can share links to your book through Facebook and Twitter.



Webbook Width: Choose how much space the content of your book will fill on a normal computer screen. Options include Narrow, Standard, and Wide.

Paragraph Separation: Decide whether paragraphs in the webbook are indented or separated by skipped lines. Webbooks default to the “skip lines” paragraph separation setting for optimal digital reading, but can be changed.

Display Part Title: Add the Part Title to the Chapter Title at the top of each chapter.

Collapse Sections: Create collapsed sections in individual webbook chapters to make long chapters easier to navigate. Any heading tagged with a Heading 1 paragraph style will become a collapsible subsection. For more information, read our chapter on collapsible sections for webbooks.

Enable Image Lightbox: Allow readers to view linked images more easily by turning on the Lightbox feature. Click here to learn more about image lightboxes.

PDF Options

All choices you make on the PDF Options page will affect both your

print PDF and your digital PDF. See what settings are available to you below.

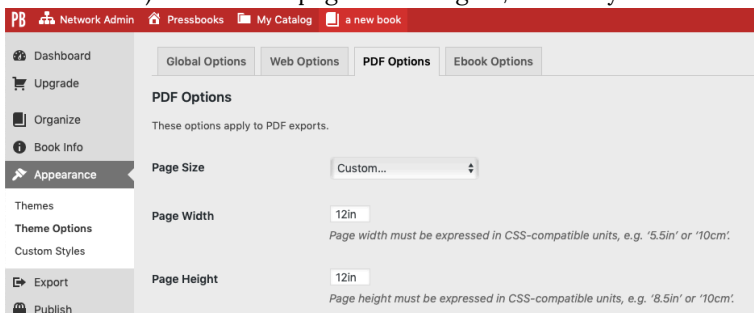
Header Font: Change the theme’s default header font to one from an available list of open-source typefaces. Both serif and sans serif fonts are available. (**NOTE:** This option is currently only available on the Malala theme.)

Body Font: Change the theme’s default body font to one from an available list of open-source typefaces. Both serif and sans serif fonts are available. (**NOTE:** This option is currently only available on the Malala theme.)

Body Font Size: Choose the size of the body text in your print book as a point value. All other elements in your book are proportional to the body font size and will change accordingly. The default font size may depend on the theme you have chosen, but is generally around 10pt.

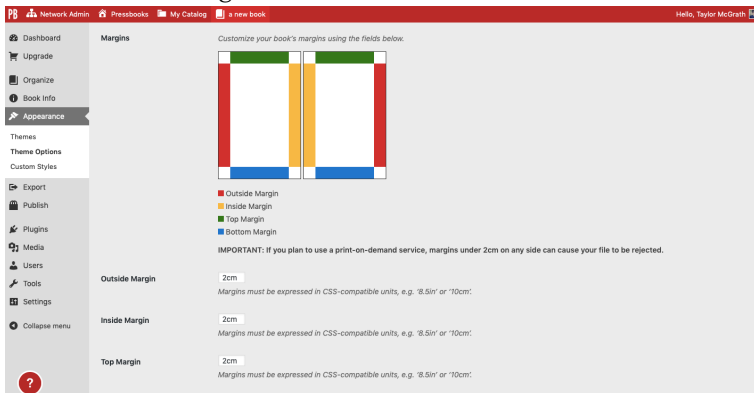
Body Line Height: Choose the line height as an em value. Line height is the amount of space between lines of text in a paragraph. Default line height may depend on the theme you have chosen, but is generally around 1.4em.

Page Size: Choose from an array of available default sizes for your print book, or select your own size by choosing “Custom” from the Page Size dropdown menu. Once you select “Custom,” Page Height and Width options will appear, and you can insert your custom page size, expressed in a CSS-compatible unit (like inches or centimeters). The default page size is Digest, or 5.5” by 8.5”.



Margins: Set the size of your top, bottom, inside, and outside margins. Choose a value that’s expressed in a CSS-compatible units

(like inches or centimeters). (**NOTE:** Print-on-demand services generally require that margins are at least 2 cm on all sides). The default size of all margins is 2 cm.



Hyphens: Enable or disable hyphenation of words at the end of lines throughout your book. If you choose to disable hyphenation, justified text may look more ragged to accommodate words that have to shift to the next line.

Paragraph Separation: Decide whether paragraphs in exported PDF files are indented or separated by skipped lines. PDFs default to the “indented paragraphs” separation setting for ideal readability in print format, but can be changed.

Section Openings: Choose what side of your book a chapter will open on, with options including left or right page section openings, right page section openings only, and no blank pages. Note that if the right page section opening options is chosen, then the preceding page will be blank if there is not enough content from the previous chapter to fill it.

Table of Contents: Choose to disable the automatically generated table of contents in your print book. Note that no option exists to disable the table of contents in digital formats because of requirements for accessibility and navigation.

Crop Marks: If your print distributor requires that your interior files contain crop marks, enable the crop mark setting.

Footnote Style: Choose whether footnotes in your print book

display at the bottom of the page the footnote appears on, or display at the end of the chapter as chapter endnotes.

Widows and Orphans: Choose how many words isolated at the top of the page constitute a widow, and how many words at the bottom of a paragraph constitute an orphan. Pressbooks will adjust the flow of your content to avoid creating widows and orphans whenever possible. [Click here to read more about widows and orphans.](#)

Running Heads and Feet: Running heads and feet are the content that appear in the top or bottom margins of every page in the book. You can choose the specific running content for the left and right page of the following sections of your book: front matter, introduction, part, chapter, and back matter. You can choose from various options that are already in your book's metadata, including: book title, book subtitle, book author, part number, part title, section title, section author, section subtitle, blank, or custom. If you choose "custom", then whatever text you insert into the text cell will appear in the running content for the correlating section.

Ebook Options

Header Font: Change the theme's default header font to one from an available list of open-source typefaces. Both serif and sans serif fonts are available. (**NOTE:** This option is currently only available on the Malala theme.)

Body Font: Change the theme's default body font to one from an available list of open-source typefaces. Both serif and sans serif fonts are available. (**NOTE:** This option is currently only available on the Malala theme.)

Ebook Start Point: Choose a page that your ebook will open to for readers. Note that not all e-reader platforms will respect this start point. By default, the ebook opens to the title page.

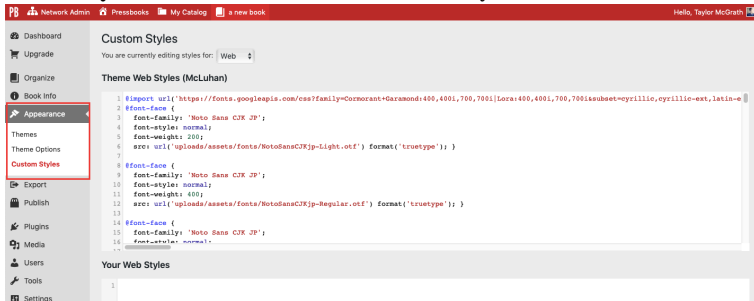
Paragraph Separation: Decide whether paragraphs in exported

EPUB and MOBI files are indented or separated by skipped lines. Ebooks default to the “indented paragraphs” separation setting to mimic the traditional design of a print book, but can be changed.

Compress Images: Reduce the size and quality of images in your ebook. Generally those who enable this setting are creating a print book and ebook simultaneously and have uploaded large, high-resolution images for their print books. It is recommended to lower the quality and size of media for your ebook as some ebook distributors will assess additional fees for larger files sizes.

Custom Styles

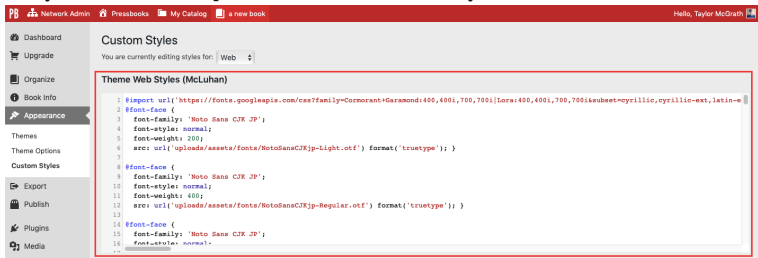
For any customizations that you’d like to make that are not currently available as Theme Options, you may want to consider creating your own Custom Styles. Custom Styles are any CSS (Cascading Style Sheet) changes that you add to the base theme of your book. You can view and edit the CSS for your book by going to **Appearance > Custom Styles** from the left sidebar menu of your book’s dashboard.



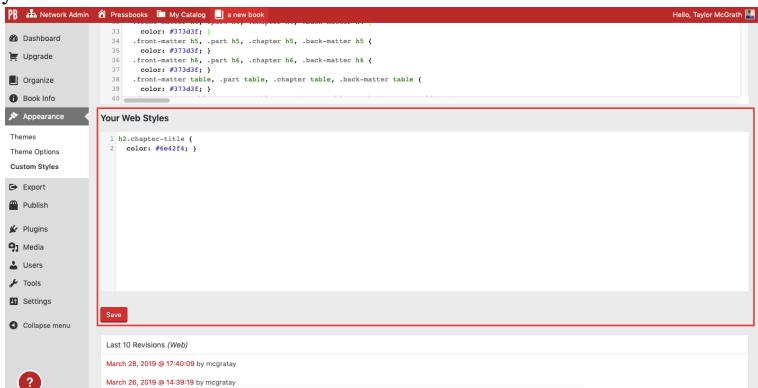
The stylesheets for your book are broken into three sections for each of the three supported book formats you can create on Pressbooks: **Web**, **PDF**, and **Ebook**. Select the stylesheet that you would like to view from the dropdown menu at the top of the page.



The first section of the page will include a scrolling box that contains the entire stylesheet for a given format. The contents of the stylesheet are dependent on the theme you've chosen.



The second section is where you can make any edits to the stylesheet. Any CSS added in this section will override existing styles for the same class.



The editor also keeps the last 10 revisions of each stylesheet for your book, so if you make a mistake you can restore an earlier version by clicking the hyperlinked time stamp in the Revisions section.

For more information, click [here](#) to read our chapter on Custom Styles.

Pressbooks helps you design and produce the files you need to publish your book. With our self-service software, create the reader-ready PDFs required by print and print-on-demand distribution services, and the EPUB or MOBI files necessary to distribute with ebook stores like Kindle, Nook, and more.

In this chapter we will cover:

- Choosing the Right Format
- Selecting Content for Export
- Exporting your Book Files
- Upgrade your Book Files
- Web Distribution of Exported Files [PressbooksEDU feature]

Choosing the Right Format

Depending on how you plan to publish, you will need to choose an export format for your book. In addition your Pressbooks webbook, you can choose four different export file formats:

- **Print PDF:** Export a print PDF file if you plan to publish your book in print format. This file meets the requirements of printers and print-on-demand services.
- **Digital PDF:** Export and download the digital PDF instead if you do not plan on printing the file. These can be used online

and can contain hyperlinks for easier navigation.

- **EPUB:** Export EPUBs to submit to any popular ebook distributor except Amazon KDP. This is the file you'd use to submit your ebook to Kobo, Nook, iBooks, and others.
- **MOBI:** Export a MOBI file to submit your ebook to Amazon KDP.

Select Content for Export

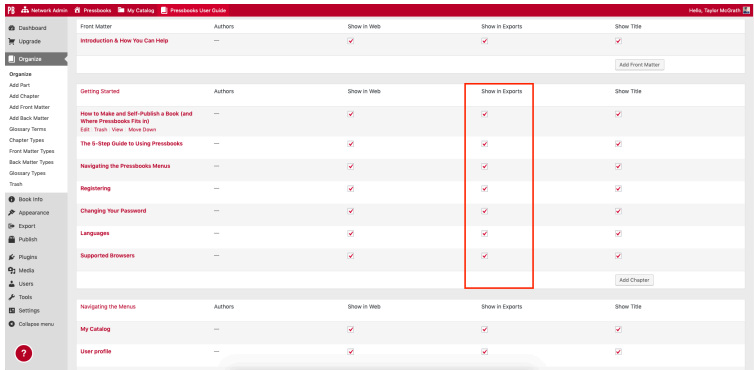
Not all content in your book in Pressbooks has to be included in your exported files. This is a convenient feature for users who are creating books for several formats and only want certain content and a specific format.

You can decide which chapters, front matter, and back matter you'd like to be included in your exported files from the **Organize** page:

1. Go to **Organize** from the left sidebar menu in Pressbooks.
2. Find the “Show in Exports” column at the top of a section.
3. Select the box in this column for each chapter you want in your exported files.

Chapters should be selected by default. You can tell that a chapter has been selected to Show in Exports when a checkmark appears. Unselect the box by clicking it again to remove the chapter from your Exports

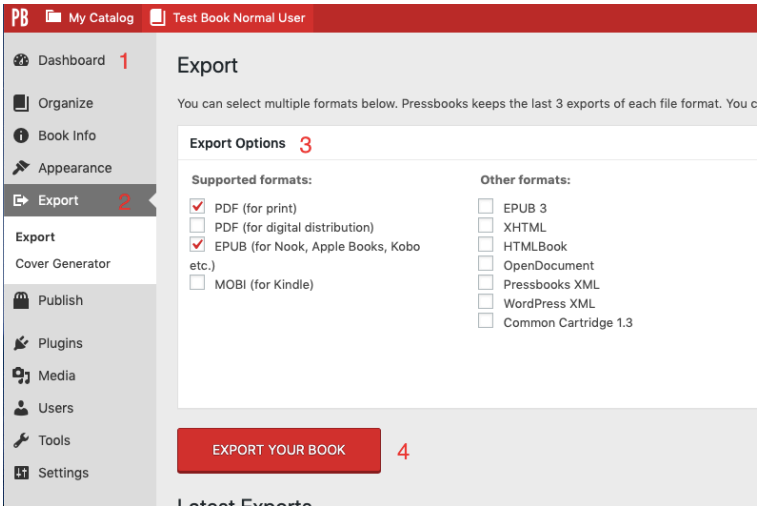
You can also click “Show in Exports” at the top of a column to select or deselect all chapters in that section.



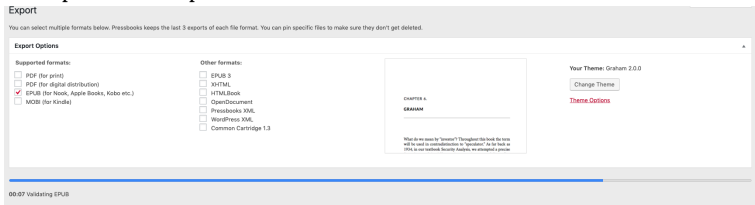
Export Your Book Files

To export your book:

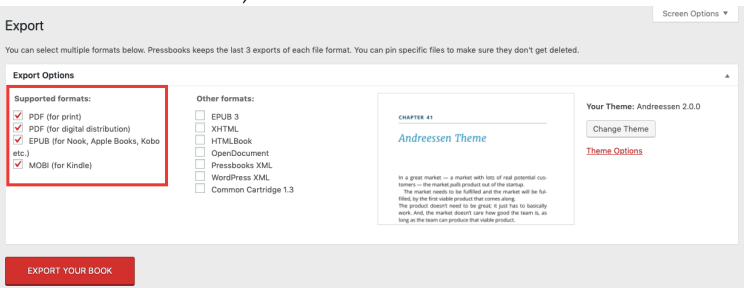
1. Access your Pressbooks dashboard.
2. Click **Export** from the left sidebar menu.
3. In the “Export Options” panel, select the boxes for the file formats you wish to export.
4. Click the **Export Your Book** button directly under the “Export Options” panel.



A progress bar will appear, and you can watch as each step of your files' export is completed.



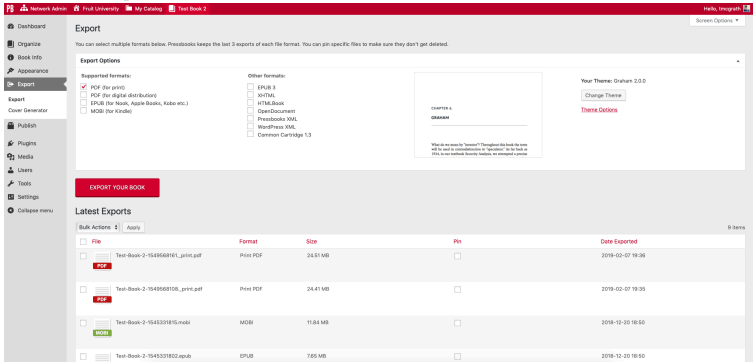
Supported file formats for export include PDF (for print), Digital PDF (for digital distribution), MOBI (for Kindle), and EPUB (for all other ebook distributors).



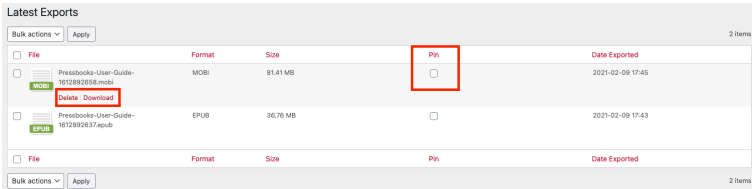
Pressbooks also allows you to export other beta formats. This includes EPUB 3, XHTML, HTMLBook, OpenDocument, Pressbooks XML, and WordPress XML.

NOTE: Pressbooks cannot offer technical support for issues with your files in any of the formats still in beta testing.

To view how changes you have made will affect your book (like edits to chapters or changing your book theme), you must export and download a new set of files. When successfully exported, the files will appear underneath “Latest Exports.” Pressbooks keeps the last 3 files exported of each format.



Download, delete, or pin exported files



Download: To download an exported file, hover over the file name and click the “Download” link that appears.

Delete: To delete an exported file, hover over the file name and click the “Delete” link that appears.

You can also delete files in bulk by following these steps:

1. Select the box to the left of the files you’d like to delete, or select the box at the top left of the table to select all files for deletion
2. Click the **Bulk Actions** dropdown menu at the top or bottom of the table and select **Delete**.
3. Click **Apply**.

Pin: You can pin a file in your Latest Exports table to prevent the file from being deleted and allow you to find it more quickly in the future. To do so, select the box in the “Pin” column for the file you wish to save.

You can save up to 5 files, and up to 3 of one file type. If you try to pin a 6th file, you’ll receive an error message. If you’ve pinned three files of a given export type and then try to export a new file of that format, you’ll see an error message asking you to deselect one of your pinned files before attempting to export again.

Adjust Table Settings: By default, the Export table will show you all the files you’ve exported. If you’d rather your files display in a shorter table with navigable pages, you can adjust the table settings to display fewer rows with the **Screen Options** setting available at the top of the page.

Sort: You can organize your files by file name, format, size, pinned status, or date by clicking the links for those terms available at the top or bottom of the table.

Upgrade Your Book Files

All exported books include a Pressbooks promotional watermark before you upgrade. To learn more about how to upgrade, remove the watermark, and the benefits you will receive, read our chapter on [How to Upgrade your Pressbooks.com book](#).

Once you upgrade, you can still re-export your files. The upgrade is permanent for each book you upgrade and will apply to all future exports of the same book.

Web Distribution of Exported Files

If you are creating your book on a PressbooksEDU network, you also have the option to enable public downloads of your exported book files directly from your webbook homepage.

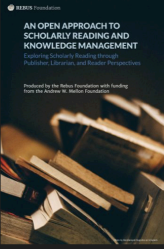
An Open Approach to Scholarly Reading and Knowledge Management

Exploring Scholarly Reading through Publisher, Librarian, and Reader Perspectives

Hugh McGuire, Boris Anthony, Zoe Wake Hyde, Apurva Ashok, Baldur Bjarnason, and Elizabeth Mays

In 2017, [The Rebus Foundation](#) embarked on a research and development project to prototype an open, web-based reading system, with funding from the [Andrew W. Mellon Foundation](#).

Our main goals with this project were to clearly identify and understand the different players involved in the publication, distribution and consumption of scholarly monographs, and to explore how Open Web technologies could improve scholars' access to, and interaction with, scholarly monographs. We've summarized our research findings in this [report](#).



Download this book

EPUB

Digital PDF

To enable public downloads on your book, follow these steps:

1. Go to **Settings > Sharing & Privacy** from the left sidebar menu in Pressbooks.
2. Find the setting titled “Share Latest Export Files”.
3. Select the following option: “Yes. I would like the latest export files to be available on the homepage for free, to everyone.”
4. Click **Save Changes**.

Turning on the “Share Latest Export Files” option will enable the feature on your book, but files won’t appear to the public until a book administrator has exported them from the **Exports** page.

NOTE: Only the most recent file of each format will display in your public file downloads.

For more information on this feature, please read our chapter on the [Web Distribution of Exported Files](#).

Need more help? Check out our brief video demonstration:



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=212#oembed-1>

Once you have finalized your book and exported your files, you can upload your book to various ebook book retailers or send copies to print-on-demand providers to create physical copies of your book.

In this chapter, we will cover:

- Choosing an ebook retailer or print-on-demand service
- How to add **Buy** links to your Pressbooks webbook in the **Publish** menu

Choosing an ebook retailer or print-on-demand service

Pressbooks allows you to export your book into formats compatible with different ebook retailers or those appropriate for print-on-demand services. While there are many options available to you, we have some recommendations on where to get started.

Ebook stores

Once you have downloaded your files, you can either submit them to ebookstores yourself, or use a third-party distributor.

Recommended self-serve ebookstores are Kindle, Kobo, and Barnes & Noble Press. Other ebook stores include Apple iBooks and Google.

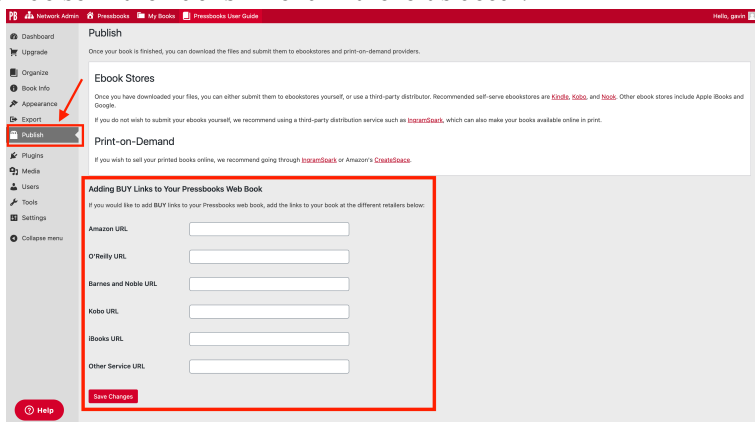
If you do not wish to submit your ebooks yourself, we recommend using a third-party distribution service such as IngramSpark, which can also make your books available online in print.

Print-on-demand

If you wish to sell your printed books online, we recommend going through IngramSpark or Amazon's CreateSpace.

How to add Buy links to your Pressbooks webbook in the Publish menu

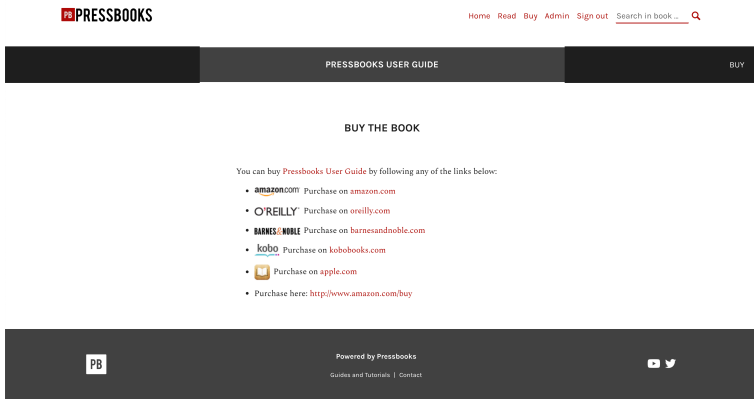
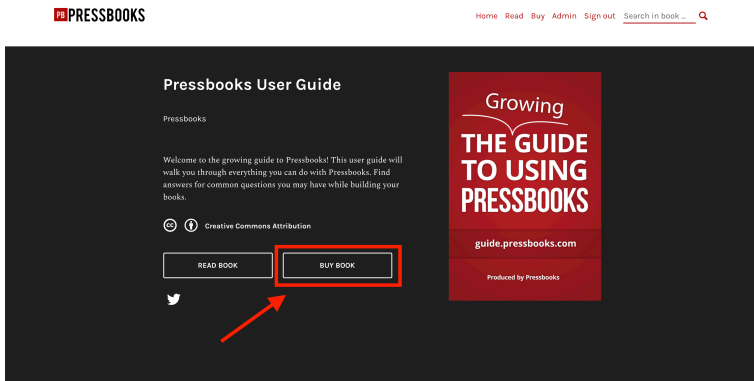
If you would like to add a **Buy** link in your Pressbooks webbook that sends readers to purchase your book from an online retailer, you can do so in the **Publish** menu in the left sidebar.



Depending on which online retailers you have chosen to sell your book, you can add links to the published version in the online stores. These retailer links include Amazon, O'Reilly, Barnes & Noble, Kobo,

and iBooks, though if you have chosen a retailer not included in this list, you can use the final field to include a link to another service. Once you have added the links, click **Save Changes**.

Now that you have added links to purchase your book, a **BUY BOOK** button will appear on the homepage of your Pressbooks.com webbook. Clicking this button will provide readers with links directing them to purchase the book from whichever retailers you have included.



ADD MEDIA AND INTERACTIVE CONTENT

PRESSBOOKS

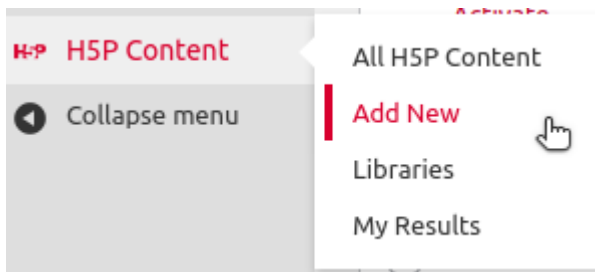
Pressbooks features a native integration with H5P, an open-source plugin which can be used to create interactive quizzes and other learning activities in your book. There are over 40 different H5P activity types, ranging from simple True/False questions to image matching exercises to quiz sets to interactive video quizzes and even complex branching scenarios!

University of Queensland classifies H5P content types [opens in new tab] based on their educational purpose and UDL considerations.

Create H5P Activities

Follow the steps detailed hereunder to add new H5P content from your book's admin dashboard menu.

1. Click '**H5P Content** -> **Add New**' from your book admin dashboard menu



2. Click '**I consent, give me the Hub!**' to activate the H5P Hub interface (recommended)

3. Click **'Get'** and following the steps indicated for the content type you'd like to create.
4. Enter the information for your quiz/activity etc.
5. Click **'Create'** when you've completed the activity to your satisfaction.

Import H5P Activities

You can also import H5P activities you've downloaded from Pressbooks or other locations on the public web.

If you are looking for H5P activities to import, you can look on the Pressbooks Directory. On the card for each book, you'll see a hyperlink that leads to that book's H5P activities. From here, you can download H5P activities and import them into your book.

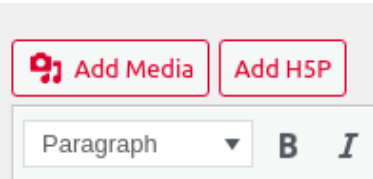
There are some other places where you could look for H5P activities to download and import, such as the eCampusOntario H5P catalog.

Learn more about the available activity types and how to create them by consulting H5P's documentation.

Learn more about creative pedagogical uses for H5P in Pressbooks by visiting The H5P Pressbooks Kitchen, a terrific set of resources created by our friends at BCcampus.

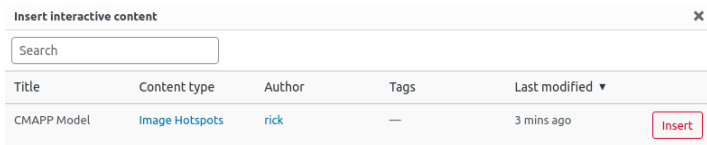
Add H5P Activities to Your Book

Once you've activated the H5P plugin, your visual editor will include a new 'Add H5P' button next to the 'Add Media' button. You can use this button to add the shortcodes for H5P activities throughout your book. To add an H5P activity you've created:



1. Navigate to the location where you would like add your activity.
2. Click the 'Add H5P' button
3. Find the activity you'd like to add to your book and click

'Insert'



An H5P shortcode will be inserted in your chapter using the pattern The original version of this chapter contained H5P content. You may want to remove or replace this element.

4. Save your chapter and view the web version to see embedded activity.

CONTENTS ▾ H5P DEMO

H5P Demo

Here is my H5P content:

Question 1

Answer 2

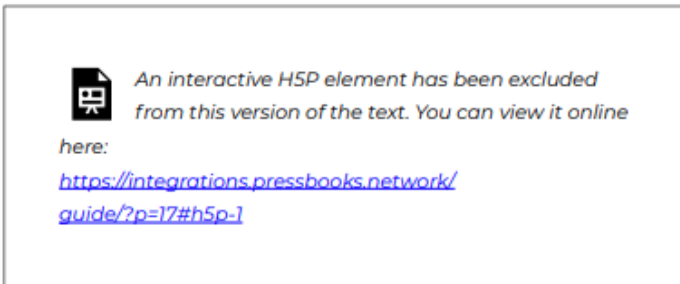
Answer 1

Check

[Download](#) [Embed](#) H5P

Save and view in the webbook.

In your EPUB and PDF exports, H5P activities be replaced by placeholder text which includes a link to the activity in the webbook:



View All H5P Activities in Your Book

All public books include a listing of all the H5P activities which have been created for that book. You can find the H5P listing page by

adding the following path to the end of a webbook's homepage URL:
/h5p-listing/

You can view a sample H5P Activities List at <https://wisc.pb.unizin.org/portuguese/h5p-listing/>

The H5P activities list will indicate the total number of H5P activities created in a given book, displaying them in groups of 20 with pagination controls at the bottom of the page. Activities are listed by their shortcode ID number (in order of creation) and will be hidden by default. You can choose to expand all activities at once by clicking the **Expand All** button at the top of the page. Alternatively, you can click the **Show Activity** button to display a specific H5P activity.

H5P ACTIVITIES LIST

This book includes **136** H5P activities. Only those which have been inserted into book content will be included if the book is cloned. [EXPAND ALL](#)

ID	Title	Activity type	Show/Hide
3	1.1 A	Single Choice Set	SHOW ACTIVITY
4	Dialogue1.A	Single Choice Set	HIDE ACTIVITY
<div style="border: 1px solid #ccc; padding: 10px;"><p>Pedro é do Brasil? 🔊</p><div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;">É.</div><div style="background-color: #f0f0f0; padding: 5px;">Não, é de Portugal.</div></div> <div style="border-top: 1px solid #ccc; padding-top: 5px; margin-top: 5px;">🔄 Reuse ↔ Embed H5P</div>			
5	2.2 A	Fill in the Blanks	SHOW ACTIVITY
6	4.1 B	Fill in the Blanks	HIDE ACTIVITY

Prefer to watch and learn? Check out this video tutorial:



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=220#oembed-2>

Watch the following video and learn how to increase student engagement using H5P.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=220#oembed-3>

Find Open Textbooks with H5P Activities Pressbooks Directory

The following video by the Optimized Educator demonstrates how to use Pressbooks Directory to find open textbooks, and then to filter those textbooks by interactive activities you may want to embed or clone.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=220#oembed-1>

PRESSBOOKS

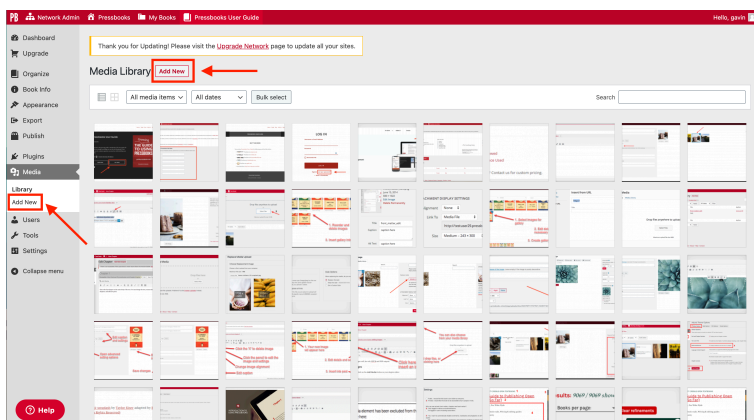
Pressbooks allows you to incorporate different types of media into your webbook, including images, audio, video, documents, and more! The **Media** menu allows you to add new media in bulk, edit your media, and add important information like titles, captions, and alt text.

In this chapter, we will cover:

- Adding media to your Library
- Adding media details and editing your media
 - Adding details
 - Editing attachments
- Deleting items

Adding media to your Library

If you plan on adding media to your Pressbooks book, an easy way to make sure you can include media into chapters as you write is to upload attachments to the media **Library** in advance. You can access the **Library** and upload attachments by clicking **Media** in the left sidebar menu.



To upload attachments to your Media Library, click **Add New**, found either in the left hand side bar below **Media** or with the red button within the Media Library. You can either click to select specific files or drag and drop to upload them to your Library.

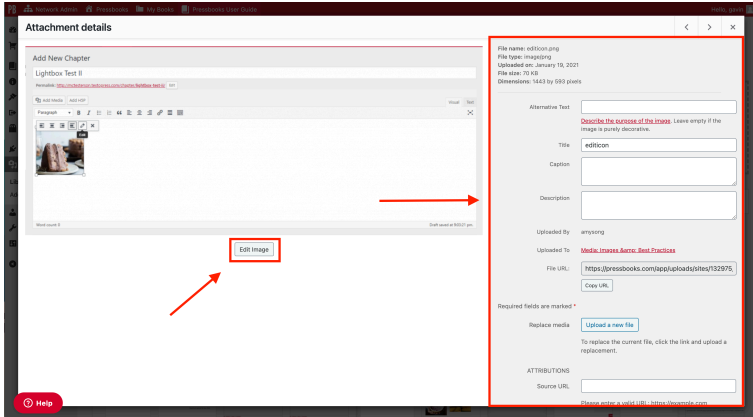
Note: Please note that the maximum upload size for a single attachment is 25 MB.

After upload, your attachments will appear in your **Library**. The toolbar at the top of your library allows you to quickly find attachments you have uploaded by type (by clicking the **All Media Types** dropdown menu), by date added (by clicking the **All Dates** dropdown menu), or by using the search bar on the right side to search by title, caption, or any other details you have included with your attachments.

Adding media details and editing your media

Selecting any media in your **Library** allows you to add important

details to your attachment as well as editing them. Clicking on an attachment will bring up the Attachment Details menu.



Adding details to attachments

The right side of the Attachment details menu includes fillable fields to include more information about the media. This includes a title, caption, and description field.

We also recommend including Alternative Text descriptions (also known as alt text) to all of your media attachments to improve the accessibility of your book. Alt text is useful for users that are visually impaired and using screen readers, allowing them to understand the content of a media attachment.

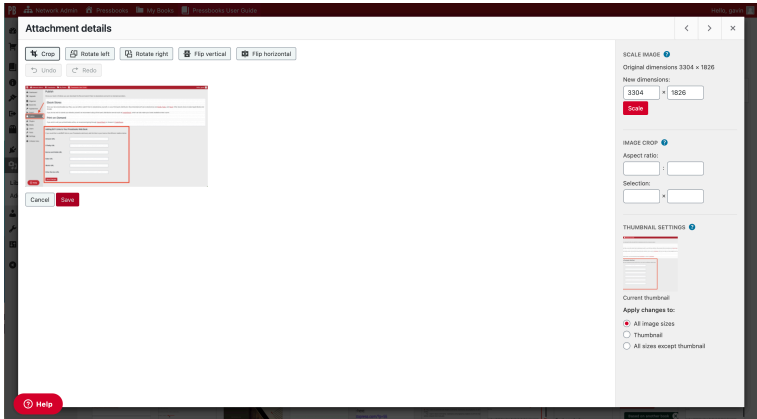
If you are using media that you did not create yourself, there are also fields available to include attribution for the media, including a source URL, author details, and licensing information.

Editing attachments

You can edit some aspects of your attachments directly within your

media **Library**. You can do so by selecting an attachment within your Library to open the Attachment details menu and selecting **Edit Image**, found below the preview of your media.

You can perform edits like cropping, rotating, or flipping your media as well as changing the scale or aspect ratio. Once you are satisfied with any edits, click **Save** to return to the Attachment details menu.



Deleting items

Deleting a single attachment

To delete a single attachment, select it in the media Library to bring up the Attachment details menu. Scroll to the bottom of the right side menu and click **Delete permanently**.

Deleting multiple attachments

To delete multiple attachments at once, click **Bulk Select** in the toolbar of the media Library. You can now select one or many attachments you wish to delete, then click **Delete permanently**.

ACCESSIBILITY KEY CONCEPTS

Section Topics

This section describes key concepts that describe and will direct your accessibility work. They include:

- Definitions of and the rationale for using Universal Design
- How using personas will help you understand the students reading your textbook

Adopted from: Accessibility Toolkit – 2nd Edition by BCcampus is licensed under a Creative Commons Attribution 4.0 International License, except where otherwise noted.

ERIN FIELDS; AMANDA GREY; DONNA LANGILLE; AND CLAIR SWANSON

Accessibility

One of the basic premises of open education is access. The United Nations Educational, Scientific and Cultural Organization (UNESCO) believes:

“...that universal access to high quality education is key to the building of peace, sustainable social and economic development, and intercultural dialogue. Open Educational Resources (OER) provide a strategic opportunity to improve the quality of education as well as facilitate policy dialogue, knowledge sharing and capacity building” (Open Educational Resources, UNESCO)

Access in this context refers to the ability for students, instructors, and others to obtain access to education. Releasing textbooks and other educational resources with open-copyright licenses is a big step toward removing barriers, as it makes these materials free of cost and free to use, distribute, and change. But there is more that goes into accessing a resource than it just being free and online. For a textbook to be truly accessible, people of all abilities need to be able to access the content. This means designing a textbook that accommodates people with diverse needs and ensuring the content can be accessed by all, regardless of ability. It also means creating materials that include diverse viewpoints and voices.

Reducing Barriers to Access

As an open textbook author and publisher, it's important to consider

the social-justice side of open education. Listed below are some of the barriers students face during their education, as well as some solutions and examples (Adopted from Accessibility, Diversity, and Inclusion Copyright © 2023 by Lauri M. Aesoph is licensed under a Creative Commons Attribution 4.0 International License, except where otherwise noted).

Reducing Barriers to Access		
Barrier Type	Challenge	Solution
	Low vision or blindness	Use alternative text (alt-text) to describe an image's content or function that can be read by a screen reader.
Physical Impairments	Hearing impairment or deafness	Add transcripts and captions to all audio content.
	Motor-skill impairment, immobility	Provide file formats that can be uploaded into a variety of mobile devices.
Learning Disabilities	Difficulty absorbing information via reading or difficulty concentrating (ADHD)	Add audio clips to printed text that student can listen to while reading along.
Language Comprehension	Low literacy: adult basic education (ABE) student or English language learners (ELL)	Provide a print copy with increased font size or provide formats that allow the font size to be adjusted.
Limitations of Time and Place	Working, parenting, or live far from a college or university	Provide a version of the textbook that can be accessed from anywhere online.
	Unreliable or no access to the Internet	Set up a service that can supply a print-on-demand copy.

Accessibility Toolkits and Guides

For help making your textbook accessible, visit the
BCcampus Accessibility Toolkit

Reasons to Adapt an Open Textbook in the BCCampus
Open Education Adaptation Guide

Tips for Accessibility

Here are some tips that can help making the textbook more accessible:

- Use clear, straightforward language. Make the content understandable.
- Provide multiple formats whenever possible. This will allow different users to access the resource in different ways.
- Use a clear organizational structure to guide readers through the resource.
- Provide proper information and resources to make the content readable and understandable for users (ie. Glossary, Abbreviation list).
- Use personas to 'test' out draft resources for different users.
- Develop an accessibility statement to show ways that the resource has been made more accessible and way for users to contact you with suggestions to improve accessibility.
- When requesting peer reviewers, make sure to highlight the importance of accessibility, diversity, and inclusion.

Exercises

BCcampus Open Education Review Rubric [Word file] addresses the issue of diversity and inclusion.

Checklist for Accessibility from Accessibility Toolkit – 2nd Edition by BCcampus

Universal Design

Universal Design is the process of creating products (devices, environments, systems, and processes) that are usable by people with the widest possible range of abilities, operating within the widest possible range of situations (environments, conditions, and circumstances). Universal Design emerged from the slightly earlier concept of being barrier-free, the broader accessibility movement, and adaptive technology and assistive technology. It also seeks to blend aesthetics into these core considerations.

Inclusive Design Survey

Survey your syllabus and course design with the Inclusive by Design survey

Diversity and Inclusion

UBC Example – Psychology

Dr. Benjamin Cheung has been working on adapting *Principles of Social Psychology* by Dr. Charles Stangor in order to replace the images with ones that show more diversity. This reflects the current diversity of the average classroom. His current revisions are focused on replacing gender pronouns to be neutral.

In the context of writing an open textbook, diversity means including a wide range of perspectives in your textbook. This can help ensure that more readers identify with and relate to the material. Some benefits are:

- Engaging more students because they recognize themselves or their life experiences in the material
- Appealing to instructors in a variety of educational settings
- Creating a more interesting reading and learning experience

Diversity in open education can be achieved by including a variety of sociological perspectives in your open content. Doing this ensures that your students can identify with and relate to your course material. Critical here is ensuring that other cultures are presented accurately in your materials, and not according to stereotypes or perceptions based on the standards of your own culture. Diversity in your open educational resource may include:

- Including a variety of pronouns and gender expressions to

describe people in your text

- Using images, examples, and case studies that depict Indigenous, Black and other people of colour without perpetuating stereotypes
- Using images, examples, and case studies that depict people with disabilities, and bodies of all sizes, without perpetuating stereotypes
- Using images, examples, and case studies that depict 2SLGBTQIA+ people without perpetuating stereotypes
- Including Indigenous territories and place names in addition to, or in lieu of, colonial place names

Ethnocentrism

Whether intentional or not, **ethnocentrism** can creep into the content and presentation of a textbook, and it is something all authors should be aware of. This doesn't mean you must write a book that fits every culture and perspective, only that you are respectful.

If you aren't certain about how or where to add examples relevant to other cultures, that doesn't mean your resource will never include these perspectives. Thanks to your OER's open license, once your resource has been published, instructors from other countries, cultures, and socioeconomic backgrounds might choose to remix your work for their course's needs. The changes they make might include:

- Translating the book into a different language
- Adjusting the content to meet the local cultural, regional, and geographical interests
- Revising the material for a different learning environment

Another option for making your work more inclusive from the

beginning is to consider inviting instructors and professionals in your field to contribute to your OER; however, you should be aware of the ways in which your project's design may deter or welcome people of other ethnicities, races, and cultural backgrounds (Rebus Community, "Diversity, Equity, and Inclusion in OER") For example, you may have set up regular meetings for those collaborating on your project at a time that is not feasible for a scholar living in a different time zone. Keep this and other considerations in mind if you would like people from other countries to collaborate on your project.

Advancing Equity Through Open Pedagogy

Open pedagogy can be a powerful tool for letting students take control over how they engage with and relate to their course content. In some ways, engaging students in the creation of OER can be seen as the ultimate way of allowing them to see themselves reflected in their work.

However, there can be some concerns with this approach as well. For example, your student body might be composed of a majority of one race, sex, or class, making the total "picture" of the course content created by your students less inclusive overall (Maha Bali, "Critical Pedagogy: Intentions and Realities"). Here are some considerations to keep in mind when having students create course content, especially if your course is covering a topic related to sex, race, or cultural studies:

- Ask students for their input on the inclusivity of your resources
- Think about how your OER could be more diverse (pictures, examples, etc)
- Watch out for harmful depictions of diverse populations from your students and have a plan in place to address issues if they

arise

Fostering an environment of inclusion where your students can engage with different cultural norms is an important aspect of the college experience, whether you are teaching Physics or Criminal Justice. Although it might be daunting to jump into creating an inclusive educational resource, keep in mind that OER can be improved upon and continually revisited by yourself and others.

Start by finding or creating an OER that works for you and avoiding pitfalls like ethnocentric and exclusionary language. You can always revisit your chosen OER or work with others to improve upon it by adding more diverse examples later on.

Adaption

- Adapted from Centering Diversity and Inclusion in The OER Starter Kit by Abbey Elder licensed under a Creative Commons Attribution 4.0 International License, except where otherwise noted.
- Adapted from OER and Alternative Textbook Handbook by Ariana Santiago licensed under a Creative Commons Attribution 4.0 International License, except where otherwise noted.
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- Adapted from the The Rebus Guide to Publishing Open Textbooks (So Far) by Apurva Ashok and Zoe Wake Hyde is licensed under a Creative Commons Attribution 4.0 International License, except where otherwise noted.

AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND JOSIE GRAY

Universal Design is the process of creating products (devices, environments, systems, and processes) that are usable by people with the widest possible range of abilities, operating within the widest possible range of situations (environments, conditions, and circumstances). Universal Design emerged from the slightly earlier concept of being barrier-free, the broader accessibility movement, and adaptive technology and assistive technology. It also seeks to blend aesthetics into these core considerations.

Let's review two common definitions of Universal Design.

Definition 1

Universal Design or Universal Instructional Design (UID)

an approach to teaching that consists of the proactive design and use of inclusive instructional and evaluation strategies. This approach provides academic access to a broad range of learners, including students with disabilities, while:

- maintaining academic standards [...]
- reducing the need to having to retrofit after a course is already underway¹

1. University of Victoria, "Universal Instructional Design (UID)," Centre for Accessible Learning, accessed March 27, 2018, <https://www.uvic.ca/services/cal/staff/universal-instructional-design/index.php>.

Definition 2

Universal Instructional Design (UID)

an approach to designing course instruction, materials and content to benefit people of all learning styles without adaptation or retrofitting. UID provides equal access to learning, not simply equal access to information. UID allows the student to control the method of accessing information while the instructor monitors the learning process and initiates any beneficial methods... It should be noted that UID does not remove academic challenges; it removes barriers to access.²

Why Universal Design?

For our purposes, we frame the practice of using Universal Design in a holistic and manageable way and begin by addressing the barriers that are easy to anticipate and proactively remediate. This toolkit, therefore, will provide guidance if the answer to any of the following questions is “yes.”

- Do I have visual materials that present core concepts that not all students may be able to see or understand?
- Do I have multimedia materials (e.g., audio, video) that present core concepts that not all students may be able to hear, see, or otherwise access?

2. Ohio State University, "Universal Design for Learning," Partnership Grant: Fast Facts for Faculty, accessed March 27, 2018, https://ada.osu.edu/resources/fastfacts/Universal_Design.htm.

- Do I have documents that present core concepts in a format that not all students may be able to access?

In the *Accessibility Toolkit – 2nd Edition*, we focus on an adjunct to Universal Design: Universal Design for Learning (UDL). UDL is a set of principles for curriculum development that gives all individuals equal opportunities to learn and provides a blueprint for creating instructional goals, methods, materials, and assessments that work for everyone. Rather than a single, one-size-fits-all solution, it offers a flexible approach that can be customized and adjusted for individual needs.³

3. "The UDL Guidelines," CAST, accessed August 21, 2018, <http://udlguidelines.cast.org/>.

AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND JOSIE GRAY

Designers use personas to represent the different types of people who might access a website or product. In this toolkit, we have used personas to help you keep in mind the types of students and their various abilities while you're developing content. We've also used these personas to introduce different types of hardware and software that students typically use.

We've adapted personas from Sarah Horton and Whitney Quesenbery's book *A Web for Everyone: Designing Accessible User Experience* so they are specific to post-secondary students with print disabilities in British Columbia (based on data from CAPER-BC Annual Report [PDF] and the students who attended our focus group).

These are some of the students who will be reading the open textbooks that you write.

Mark



Mark is 17 years old. He is a future heavy-duty mechanic with a learning disability that was diagnosed in Grade 8. Mark absorbs information best by hearing it and enjoys making and fixing stuff with his hands. He's in his first semester of college, taking trades courses and loving it. Mark can't wait to complete the foundation courses and move into his first apprenticeship placement. He lives at home with his family; they all share one computer.

Ability: Difficulty absorbing a lot of information when reading

Aptitude: Basic technology user

Attitude: Prefers to do things himself, but can get easily frustrated or impatient, especially with technology

Assistive technology: MP3 player

Format preference: MP3 so he can listen on the go
Listen to an MP3 recording of a synthetic voice.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=238#audio-238-1>

Jacob



Jacob is a fourth-year business administration student who is blind and a bit of a geek. Jacob is 28 years old and can't wait to get his last few classes out of the way so he can start his career. He shares an apartment with his girlfriend.

Ability: Blind since birth

Aptitude: Skilled technology user

Attitude: Digital native, early adopter, persists until he gets it

Assistive technologies:

- Screen reader (JAWS on his laptop, VoiceOver on his iPhone)
- Victor Reader Stream
- Audio recorder (to take notes)
- Refreshable Braille display

Format preference: Electronic text, which he can easily use in JAWS and with VoiceOver; detests PDFs

Watch a student using JAWS (4:08-6:18s).



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=238#oembed-1>

Listen to a computer-science student's screen reader.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=238#oembed-2>

Diana



Diana is retraining to be a personal coach after she experienced vision loss and was unable to continue working as a bus driver. She is 48 years old and taking many of her classes online. She lives with her husband.

Ability: Gradual loss of vision; can easily read using a magnifier, but her eyes fatigue quickly

Aptitude: Intermediate technology user

Attitude: Has a routine and likes to stick to it

Assistive technologies:

- ZoomText
- TextAloud text to speech software

Format preference: PDF or electronic text that she can enlarge on her computer or listen to using TextAloud

Watch a student using ZoomText (0-1:31).



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=238#oembed-3>

Trish



Trish is a college student taking university transfer courses who prefers using print books. An accident left Trish with several physical disabilities. She is 18 years old and lives with her family.

Ability: Suffers from brain damage, paralysis, and has motor issues

Aptitude: Basic computer user, intermediate iPad user

Attitude: Generally dependent on family, so enjoys reading and studying independently

Assistive technologies:

- iPad
- Motorized wheelchair

Format preference: eBook formats, such as PDF, that can be easily loaded onto her iPad

Ann



Ann is a chemistry major with ADHD, a learning disability that makes it difficult for her to concentrate. She is 20 years old and hopes to become a pharmacist. Ann lives in a dorm on campus with two other female students.

Ability: ADHD, has difficulty concentrating

Aptitude: Intermediate computer user

Attitude: Struggles at times, but is very appreciative of how much learning software helps her

Assistive technology: Kurzweil learning software (on laptop)

Format preference: Reading and listening at the same time

Watch a student using Kurzweil on a computer (1:32-4:07).



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=238#oembed-4>

Steven



Steven is an English major who is deaf. He is 23 years old and likes the flexibility of taking online classes. He lives by himself.

Ability: Native language is ASL; can speak and read lips

Aptitude: Intermediate technology user

Attitude: Can get annoyed about accessibility, such as lack of captions

Assistive technologies:

- CART (communication access real-time translation) for lectures
- Captions
- Video chat

Format preference: No preference in regards to textbook formats; but, videos without captions are meaningless

Watch a video demonstration of CART. Note: this video is also captioned.



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=238#oembed-5>

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- Steven: “WFE005: Steven” by Rosenfeld Media. © Creative Commons Attribution 2.0 Generic Licence.
- Mark, Diana, Ann: Original artwork by Hilda Anggraeni (BCcampus). © Creative Commons Attribution 4.0 International Licence.

Learning Objectives

By the end of this chapter, you will be able to:

- Explain how your cultural and class-based perspectives can affect your course content, for better or worse.
- Provide two examples of activities to encourage inclusivity in your course.

Adaptability and affordability are two major aspects of what makes an open educational resource attractive to students, but there is another facet that should be considered when you are developing or adapting an OER for your course: perspective. In particular, you should ask yourself how the perspectives being represented in your OER might affect the **inclusivity** of your course environment.

WHOSE VOICE IS MISSING? AND HOW DO WE INCLUDE THOSE VOICES?

Tara Robertson's 2017 OpenCon talk, "Diversity, Equity, and Inclusion in Open Research and Education" asks whose voices are included in our work and whose are missing.

As Quill West argues in her blog post on diversity and inclusion in open education:

"As important as access is to students and to institutions, it is a starting place for leveraging other benefits of OER, and I hope that our conversations about [open education] go beyond access, because saving money on materials doesn't address bigger issues in student persistence and completion."¹

In this chapter, we will discuss some of the opportunities and drawbacks of using OER to promote inclusivity in your courses.²

1. West, Quill. "Overview of EDI and Open Education." CCCOER *blog*, June 28, 2018. <https://www.cccoer.org/2018/06/28/on-equity-diversity-inclusion-and-open-education/>
2. **Attribution:** "Diversity & Inclusion" was adapted from Including all students by SUNY OER Services, licensed CC BY 4.0.

Diversity and Inclusion

Merriam-Webster defines diversity as “the inclusion of different types of people (such as people of different races or cultures) in a group or organization.”³ Diversity is often perceived as an organizational goal or ethical preference: for OER, including diverse perspectives is vital.

Diversity in open education can be achieved by including a variety of sociological perspectives in your open content. Doing this ensures that your students can identify with and relate to your course material. Critical here is ensuring that other cultures are presented accurately in your materials, and not according to stereotypes or perceptions based on the standards of your own culture.⁴

Whether intentional or not, ethnocentrism — “a tendency to view alien groups or cultures from the perspective of one’s own” — can creep into the content and presentation of your course materials, and it is something all authors should be aware of. This doesn’t mean you must create course content that accurately portrays and includes all cultures and perspectives; however, you should be respectful toward other people and be aware of your biases as they arise.

One way you can accomplish this is by explicitly acknowledging the perspectives that are included in your content and those which are not. How has your social and cultural background reflected on the work you’ve created? What authors are being cited and

3. Merriam-Webster’s Dictionary. “Diversity.” Accessed June 1, 2019.

<https://www.merriam-webster.com/dictionary/diversity>

4. Adding examples from other cultures is a good practice; however, if you don’t know much about the type of people you are “including” in your resource, your inclusion might feel like alienation for students who belong to that group.

acknowledged in your work, and why? Acknowledging that your perspective is limited while including other perspectives in your work can be an incredibly rewarding experience. Some benefits of including diverse perspectives in your course content include:

- Engaging more students because they recognize themselves or their life experiences in your course content
- Sharing content that appeals to instructors in a variety of educational settings
- Creating a more interesting reading and learning experience for your students and learners around the world

If you aren't certain about how or where to add examples relevant to other cultures, that doesn't mean your resource will never include these perspectives. Thanks to your OER's open license, once your resource has been published, instructors from other countries, cultures, and socioeconomic backgrounds might choose to remix your work for their course's needs. The changes they make might include:

- Translating the book into a different language
- Adjusting the content to meet the local cultural, regional, and geographical interests
- Revising the material for a different learning environment

Another option for making your work more inclusive from the beginning is to consider inviting instructors and professionals in your field to contribute to your OER; however, you should be aware of the ways in which your project's design may deter or welcome people of other ethnicities, races, and cultural backgrounds.⁵ For

5. Rebus Community. "Diversity, Equity, and Inclusion in OER." YouTube video, 55:00. September 29, 2017. <https://youtu.be/rUiyiAT0uMQ>

example, you may have set up regular meetings for those collaborating on your project at a time that is not feasible for a scholar living in a different time zone. Keep this and other considerations in mind if you would like people from other countries to collaborate on your project.

Advancing Inclusivity through Open Pedagogy

As we covered in our section about teaching with OER, open pedagogy can be a powerful tool for letting students take control over how they engage with and relate to their course content. In some ways, engaging students in the creation of OER can be seen as the ultimate way of allowing them to see themselves reflected in their work.

However, there can be some concerns with this approach as well. For example, your student body might be composed of a majority of one race, sex, or class, making the total “picture” of the course content created by your students less inclusive overall.⁶ Here are some considerations to keep in mind when having students create course content, especially if your course is covering a topic related to sex, race, or cultural studies:

- Ask students for their input on the inclusivity of your resources
- Think about how your OER could be more diverse (pictures, examples, etc)
- Watch out for harmful depictions of diverse populations from your students. Have a plan in place to address issues if they

6. Bali, Maha. "Critical Pedagogy: Intentions and Realities." *Hybrid Pedagogy*. September 9, 2014. <http://hybridpedagogy.org/critical-pedagogy-intentions-realities/>

arise

Fostering an environment of inclusion where your students can engage with different cultural norms is an important aspect of the college experience, whether you are teaching Physics or Criminal Justice. Although it might be daunting to jump into creating an inclusive educational resource, keep in mind that OER can be improved upon and continually revisited by yourself and others.

Start by finding or creating an OER that works for you and avoiding pitfalls like ethnocentric and trans-exclusionary language. You can always revisit your chosen OER or work with others to improve upon it by adding more diverse examples later on.

Don't "Other" Your Students

When attempting to make your course materials more inclusive for your students, the first thing you should watch out for is the possibility of "othering" your students. Merriam-Webster defines othering as "treating or considering (a person or a group of people) as alien to oneself or one's group (as because of different racial, sexual, or cultural characteristics)."⁷ Some best practices for avoiding othering include:

- Never assume your audience's gender and/or gender identity, ability, or sexual orientation.
- Avoid calling the most commonly seen traits in your context "normal."
- Make materials accessible for all students at all times.

7. Merriam-Webster's Dictionary. "Other." Accessed May 12, 2019. <https://www.merriam-webster.com/dictionary/other>

Further Reading

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<http://hybridpedagogy.org/addressing-ageism-in-the-21st-century-classroom/>
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<https://alistapart.com/article/trans-inclusive-design/>
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<http://drmarkwomack.com/a-writing-handbook/style/sexist-pronouns/>

Disclaimer

I (Abbey Elder, the author of this work) am a cis white woman from the United States. I have not experienced the types of bias that affect those from marginalized backgrounds related to race, cultural background, and sexual orientation. I have tried to keep this chapter

simple and to link out to external resources whenever applicable; however, there may be cases where my writing betrays my lack of experience with these topics.

If there is any part of this book you find to be one-sided or dismissive of any aspect of your identity, please contact me at aelder@iastate.edu. I welcome any comments or feedback that might improve my work and help inform my own understanding of this topic. Thank you.

ACCESSIBILITY BEST PRACTICES

Section Topics

This section covers best practices for making your open textbook accessible. Each chapter covers which students benefit, why accessibility is important, and the steps required to make various elements accessible.

- How to organize content
- Images
- Links
- Tables
- Multimedia
- Formulas
- Font size
- Colour contrast

Adopted from: Accessibility Toolkit – 2nd Edition by BCcampus is licensed under a Creative Commons Attribution 4.0 International License, except where otherwise noted.

AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND JOSIE GRAY

Organizing content so it has a logical flow just makes sense. Using chapters, headings, and sub-headings to organize a resource allows students to clearly see how the main concepts are related. In addition, headings are one of the main ways that students using a screen reader navigate through a chapter.

Who are you doing this for?

Everyone benefits from having content that's clearly organized. Well-organized content supports students who:

- Have a learning disability, like Ann
- Are blind or have low vision, like Jacob



Ann: "This allows me to go back and easily find the important points."



Jacob: *“This gives me more control in navigating through the chapter. I can skip to the relevant section, instead of having to read the whole thing in a linear fashion.”*

Why is this important?

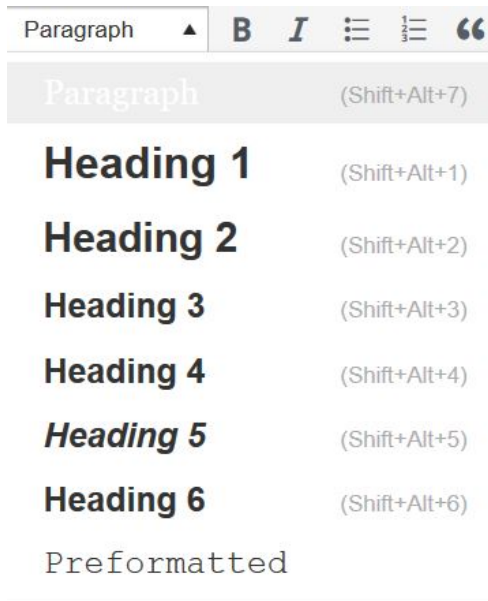
Headings help to identify the hierarchical structure of a document (e.g., sections, sub-sections). They provide a visual cue that helps sighted readers quickly navigate through sections of a document, skimming until they find the section they are looking for. Similarly, headings create logical divisions in the content and allow a non-sighted user to navigate a page or document easily using a screen reader.

When it comes to using visual references to indicate the hierarchy and structure of a document, you might be accustomed to changing the font style, enlarging the type size, or highlighting the text with bold, underline or italics to create the impression of a heading. This approach presents problems when creating material with

accessibility in mind because screen readers won't identify the text as a heading. Instead, the screen reader will just "read" through the text of a heading as if it were regular content, missing your intended cues about structure and organization.

What do you need to do?

In Pressbooks, use the visual editor to tag sections with Heading 1, sub-sections with Heading 2, sub-sections of sub-sections with Heading 3, and so on.



Heading options in Pressbooks' visual editor

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AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND JOSIE GRAY

In this section, we provide recommendations to guide your inclusion of accessible, image-based content.

What are images?

Images are non-text elements that include photographs, illustrations, diagrams, pictures, charts, graphs, and maps.

File types used: GIF, JPG, PNG

Why are you including the images you have selected?

Before you can determine what to do to make an image accessible, you must identify its *purpose* or *value* to your textbook. Consider the following questions:

1. Does your image serve a functional purpose? In other words, is it conveying non-text content to students? If so, you should:
 - a. provide a text alternative that serves the equivalent purpose of the non-text material¹
 - b. not use colour as the only visual means of conveying

1. "Web Content Accessibility Guidelines (WCAG) 2.0: Guideline 1.1," W3C, accessed March 27, 2018, <http://www.w3.org/TR/WCAG20/#text-equiv>.

information²

2. Does your image serve more of a decorative purpose? In other words, is it primarily a design element that does not convey content? If so, you should:
 - a. avoid unnecessary text descriptions

Who are you doing this for?

This work supports students who:

- Are blind or have low vision, like Jacob
- Have poor contrast vision
- Are colour blind and cannot differentiate between certain colours
- Use a device with monochrome display
- Use a print copy that is in black and white
- Have limited Internet access and cannot download images
- Have a form of cognitive disability

2. "Web Content Accessibility Guidelines (WCAG) 2.0: Guideline 1.4.1," W3C, accessed March 27, 2018, <http://www.w3.org/TR/WCAG20/#visual-audio-contrast>.



What do you need to do?

Determine the role of each image used in content as either functional or decorative. Once that has been decided, select how each image will meet accessibility needs by providing descriptive text in a variety of ways. Figures, such as charts and graphs that rely on colour to convey information, should also be evaluated for accessibility by students who are unable to distinguish between or see colour.

Functional images

Consider what your content page would look like if the images didn't load. Now try writing alternative text for each image that would

work as a replacement and provide the same information as the image.

There are three ways to provide alternative text descriptions for images:

1. Describe the image in the surrounding text.
2. Describe the image in the alt tag.
3. Create and link to a long description of the image.

As you work on developing your alternative text descriptions, keep the following recommendations and guidelines in mind:

- Remember that alternative text must convey the content and functionality of an image, and is rarely a literal description of the image (e.g., “photo of cat”). Rather than providing what the image looks like, alternative text should convey the content of the image and what it does.³
- For relatively simple images (e.g., photographs, illustrations), try to keep your text descriptions short. You should aim to create a brief alternative (one or two short sentences) that is an accurate and concise equivalent to the information in the image.
- For more complex images (e.g., detailed charts, graphs, maps), you will need to provide more than a one- or two-sentence description to ensure all users will benefit from the content or context you intend to provide.
- Leave out unnecessary information. For example, you do not need to include information like “image of...” or “photo of...”; assistive technologies will automatically identify the material as an image, so including that detail in your alternative description is redundant.

3. "Alt text blunders," *WebAIM*, accessed March 27, 2018, <http://webaim.org/articles/gonewild/#alttext>.

- Avoid redundancy of content in your alternative description. Don't repeat information that already appears in text adjacent to the image.

For strategies on how to make complex visuals such as graphs, tables, charts, and more accessible, see the following resource created by Supada Amornchat (CC BY-NC-SA): [Describing Complex Images for All Learners \[PDF\]](#).

Descriptions in surrounding text

You can use the surrounding text to provide the same information as conveyed by the image. This is often the best option for complex images because it makes the information available for everyone, not just those using the alt tags.

If you are editing someone else's work for accessibility, you are probably not at liberty to start adding to the main text. However, if you are the author, this is the best and easiest option.

If an image has been adequately described in the surrounding text, you can either provide a few-word description of the image in the alt tag or follow the procedures for decorative images.

Alt tags

An alt tag refers to the alt attribute (*alt* is short for alternative) within an IMG tag. All images uploaded into Pressbooks have an

alt tag, but for them to be useful, you need to insert an image description.

Alt tags are used in two cases:

1. When an image doesn't download due slow Internet, the alt tag content will display instead of the image.
2. For people who are visually impaired and use screen readers, when a screen reader finds an image, it will read out the content of the alt tag.

Alt tags should be no longer than 125 characters, including spaces and punctuation.⁴ This is because when a screen reader finds an image, it will say "Graphic" before reading out the alt tag. If the alt tag is longer than 125 characters, the screen reader will interrupt the flow of text and say "Graphic" again, before continuing to read out the alt tag. This can be confusing. For images that require descriptions longer than 125 characters, see the section on long descriptions.

To edit an image's alt tag in Pressbooks, click on the image and select the PENCIL icon (edit). Under image details, there will be two textboxes: one titled "Caption" and one titled "Alternative Text." The "Caption" box contains the image's caption, which appears under the image in the visual editor. The "Alternative Text" box is where you describe the image.

Long descriptions

Complex images, especially charts or graphs, will often require descriptions longer than 125 characters and it may not always be

4. All screen readers are different, so a 125-character max is a recommendation. Other sources may provide a different number.

possible to add an explanation to the surrounding text. In this case, you can provide a link to a longer image description or an accessible table. One way to do this is to create a section for long descriptions in your resource and use links to allow people to easily switch between the image and its description and back again.

How to set up a long description for an image in Pressbooks

Figure 1.1 shows an image from *Introduction to Sociology – 2nd Canadian Edition* that requires a longer description than what can fit in an alt tag. As such, at the end of the caption, there is a link to the image’s description.

Anyone using this textbook can access this image description by clicking on the [Image description] link, which will take them to the image description at the end of the chapter (or by flipping to the end of the chapter in the print version). This will also work for people using screen readers who are navigating through the book with a keyboard.

Curious about how this works? Try clicking on the [Image Description] link in the caption of Figure 1.1.

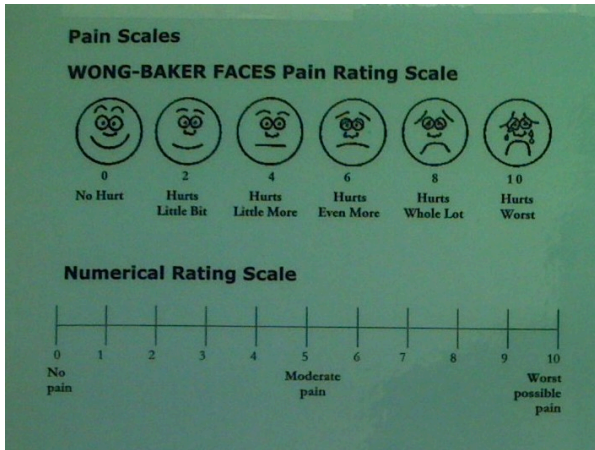


Figure 1.1 The Wong-Baker Faces Pain Rating Scale helps health care providers assess an individual's level of pain. What might a symbolic interactionist observe about this method? [Image Description]

Adding a long description to an image in Pressbooks can be complicated, but the following four steps will help guide you through the process.

Step 1: Add an alt tag

Even though you will be providing a long description, the image still needs an alt tag. In the Alternative Text field in the image editor, provide a *brief* image description (only a few words), and state that there is an image description available.

Example alt tag: Wong-Baker Faces pain rating scale. Image description available.

Step 2: Create the image description and insert it at the end of the chapter

1. Create a “Image Descriptions” heading at the end of the chapter. All image descriptions will be added under this heading in the order that the images appear in the chapter.
2. Under the “Image Descriptions” heading, insert the image’s figure number followed by the image description.

Example:

Figure 1.1 image description: The Wong-Baker Faces pain rating scale uses cartoon faces to illustrate the different levels of pain that correspond to a numbered scale from 1 to 10. Zero is smiling, 2 is a small smile, 4 is a straight face, 6 is a slightly sad face, 8 is a big sad face, and 10 is a bigger sad face that is crying.

Step 3: Link to the image description from the image’s caption

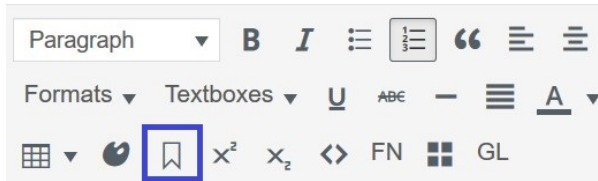
Provide a link to the image description in the caption of the image. Because the description will be on the same page of the image, you will be providing a same-page link using anchor tags.

For information on how to create same-page links in Pressbooks, see Hyperlink Material in the *Pressbooks Guide*.

1. Come up with a unique ID for the image description, which will

allow you to link directly to the description in the chapter. In this case, we used “fig1.1”. (The ID can be whatever you want, but if you have multiple images that require long descriptions, it is best practice to establish a convention for creating IDs to keep them simple and consistent. Note that IDs are case sensitive.)

2. Insert the ID using the “Anchor” button at the beginning of the image description.
 - a. Place your cursor at the beginning of the image description entry.
 - b. Select the “Anchor” button from the WYSIWYG visual editor. The button appears in the third row and looks like a ribbon.



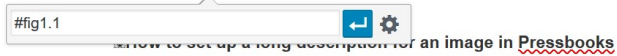
- c. A dialogue box will pop up asking you to provide a name for the anchor. Insert the ID you created and select OK.



3. Go back to your image. At the end of the caption, add “[Image Description]” to use for the link text.
4. Link the [Image Description] text to the anchor you created.
 - a. Select the [Image Description] text.
 - b. Select the “Insert/edit link” button from the WYSIWYG Visual editor. The button appears in the first row and looks like a chain link.
 - c. A dialogue box will pop up asking you to provide a URL.

Insert a number sign (#) followed by the ID you created and select the “Apply” button.

Figure 1.1 The Wong-Baker Faces Pain Rating Scale helps health care providers assess an individual’s level of pain. What might a symbolic interactionist observe about this method? [Image Description]



The following table displays how the caption will look in the visual editor view and in the image editor view.

A Sample Caption With a Link to an Image Description

Visual editor view

Figure 1.1 The Wong-Baker Faces pain rating scale helps health care providers assess an individual’s level of pain. What might a symbolic interactionist observe about this method? [Image Description]

Image editor view

Figure 1.1 The Wong-Baker Faces pain rating scale helps health care providers assess an individual’s level of pain. What might a symbolic interactionist observe about this method? [Image Description]

Step 4: Link the image description back to the image

Insert a link at the end of the image description that takes users back to the original image. This will make it easy for people to navigate back to their spot in the chapter after accessing the image description.

Example:

Figure 1.1 image description: The Wong-Baker Faces pain rating scale uses cartoon faces to illustrate the different levels of pain that correspond to a numbered scale from 1 to 10. Zero is smiling, 2 is a small smile, 4 is a straight face, 6 is

a slightly sad face, 8 is a big sad face, and 10 is a bigger sad face that is crying. [Return to Figure 1.1]

1. To link back to the image, you will need a new unique ID. In this case, we used “retfig1.1”.
2. Insert the ID using the “Anchor” button right before the image in the chapter.
3. Link the [Return to Figure 1.1] text to the anchor you just created.

Now that you have reviewed the steps to add a long description to a Pressbooks image, see Chapter 8 of the *Introduction to Tourism and Hospitality in B.C.* open textbook for an example of what long descriptions look like in practice.

Decorative images

If an image does not add meaning, i.e., if it’s included for decorative or design purposes only, or if the image is adequately described in the caption and/or surrounding text, it doesn’t need an alt tag. Including alternative text descriptions for decorative images “simply slows the process down with no benefit because the screen-reading software vocalizes the content of the [alternative text description], whether that alternative text adds value or not.”⁵

When the alt tag is left blank, the screen reader will not announce the presence of the image and will skip to the next content.

5. "Top 10 Tips for Making Your Website Accessible," *UC Berkeley: Web Access*, accessed March 27, 2018, <https://webaccess.berkeley.edu/resources/tips/web-accessibility#accessible-alt>.

Using colour

Consider what your images would look like if they only displayed in black and white. Would any necessary context or content be lost if the colour was “turned off?” Images should not rely on colour to convey information; if your point requires colour, you may need to edit or format the image so the concepts presented are not lost to those who are colour blind or require high contrast between colours.

Example 1: Inaccessible Bar Chart

In Chart 1, colour is the only means by which information is conveyed. For students who are colour blind, have poor contrast vision, or are using a black-and-white print copy (see Chart 2), relevant information is lost.

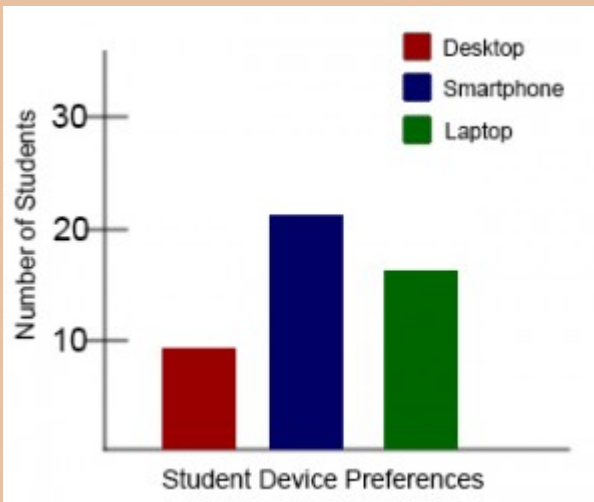


Chart 1: In this bar chart, colour is the sole means of communicating the data.

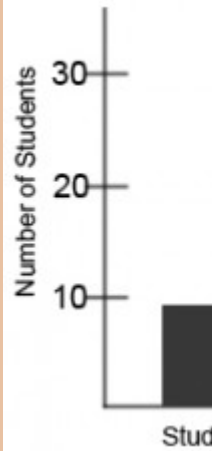


Chart 2: This view of the same chart might appear to a student who cannot display colour. All of the information is lost.

Example 2: Accessible Bar Chart

Students who are colour blind can distinguish between high-contrast shades. In Chart 3, contextual labels have been added to each bar at the bottom of the chart. Note that the chart will still require an alt tag.

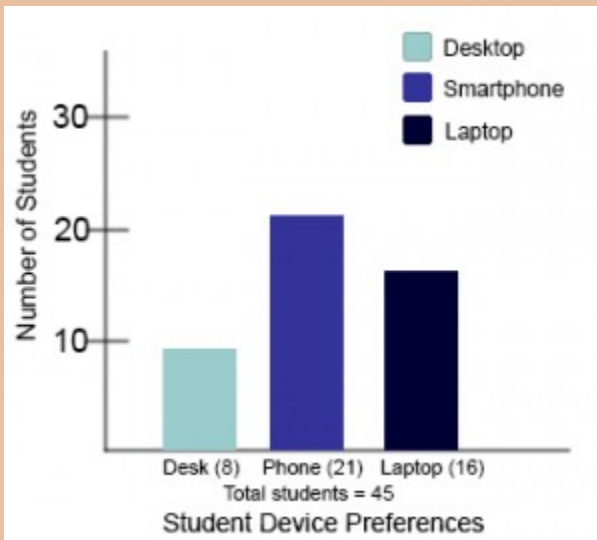


Chart 3: In this view of the bar chart, high-contrast colours have been used so that shading differences will still display in grey scale. Text labels have also been added so that the data is not just being communicated with colour.

Long description example

Figure 1.1 image description: The Wong-Baker Faces pain rating scale uses cartoon faces to illustrate the different levels of pain that correspond to a numbered scale from 1 to 10. Zero is smiling, 2 is a small smile, 4 is a straight face, 6 is a slightly sad face, 8 is a big sad face, and 10 is a bigger sad face that is crying. [Return to Figure 1.1]

Media Attributions

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- Figure 1.1: “Pain Scales” by Juhan Sonin. Adapted by BCcampus (cropped). © Creative Commons Attribution 2.0 Generic Licence.

AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND JOSIE GRAY

In this section, we review how to add accessible links to content. Links include weblinks, links between different chapters of a book, links within a chapter, and links to attached files.

What are links?

A link (also called a hyperlink) is found in a file, document, or web page that redirects the reader to additional information found in another online location such as a new web page; links are typically activated by clicking on a highlighted word or image on the screen.

File types used: HTML, PDF, DOCX, XLS

Why are you including the links you have selected?

Generally, links are included within content to point the user to additional information that is available at another location. Links between different parts of a book are also used to facilitate navigation.

For a detailed description on how to link to material in Pressbooks, see Hyperlink Material in the *Pressbooks Guide*.

Who are you doing this for?

This work supports students who:

- Have a physical disability, like Trish
- Have a form of cognitive disability, like Ann
- Are deaf or hard of hearing, like Steven
- Are blind or have low vision, like Jacob and Diana



What do you need to do?

Links can be helpful. But, like other non-text elements, they must be assessed for how students with a range of challenges can and will access them. Understanding and attending to these needs through descriptive text, proper link opening, and—when needed—a web address will ensure that all students can benefit.

Create descriptive link text

You need to ensure that all links have text that describes the topic or purpose of the link. This is important because people using screen readers might have their screen reader set to read out the text for each link on a page. As such, the link text must describe the content of the link when taken out of context for the surrounding paragraph. While link texts such as “click here” or “read more” will make sense to sighted users, they mean nothing when read on their own.¹

Example 1: Click here for information on BCcampus Open Education.

Example 2: You can find more information on BCcampus Open Education at <http://open.bccampus.ca/>.

Example 3: Information on BCcampus Open Education is available online.

While the first two examples make sense in the context of the sentence, neither link text describes the purpose of its link. While the second example is better than the first, having the web address as the link text still does not make the purpose of the link clear. The third example is the most accessible.

Link to non-web content

If you want to link to something that isn't a web page—such as a Word document, Excel file, or PDF—you should include this information in the link text.² This is important because it informs

1. "Ensure link text is meaningful within context," *Web Accessibility*, accessed March 28, 2018, https://www.webaccessibility.com/best_practices.php?best_practice_id=1301.

2. "Links to non-HTML resources," *WebAIM*, accessed March 28, 2018,

the user what will happen when they click on the link, thus preventing confusion. In addition, a user may decide not to click on a link if they know it's a certain file type. This typically happens when a user doesn't have the software needed to open the file or when they know the file type is inaccessible to them.

Example: B.C. Open Textbooks Review Rubric [Word file]

New tabs/windows

The default setting for links in Pressbooks is that they not open in a new window or tab. This is the preferred behaviour, since a new window, opening unexpectedly, can be disorienting for people. This is especially true for individuals who have difficulty perceiving visual content.³

However, if a link must open in a new window or tab, the best practice is to include a textual reference.⁴

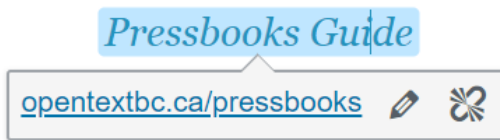
Example: Information on BCcampus Open Education [New Tab] is available online.

Pressbooks allows you to edit whether or not a link opens in a new tab. Here is how:

- Click on the link and select the PENCIL icon (edit).

https://webaim.org/techniques/hypertext/hypertext_links#non_html.

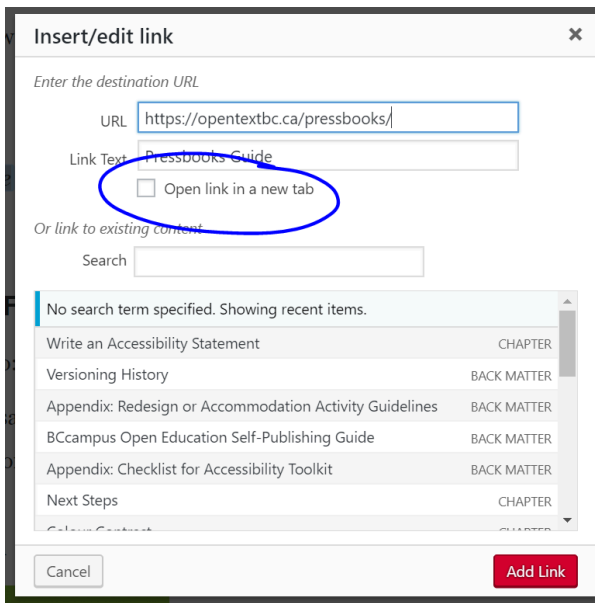
3. "G200: Opening new windows and tabs from a link only when necessary," accessed March 28, 2018, W3C, <http://www.w3.org/TR/2014/NOTE-WCAG20-TECHS-20140916/G200>.
4. Penn State, "Links on a Web Page," *Accessibility*, accessed March 28, 2018, <http://accessibility.psu.edu/linkshtml>.



- Select the GEAR icon (link options).



- Check (or uncheck) the “Open link in a new tab” box. Click “Save” or “Add Link.”



Links in reference lists

Citation styles often require a URL to be provided for all web-based content. For example, in APA style, the *Accessibility Toolkit* would be referenced as follows:

Coolidge, A., Doner, S., Robertson, T., & Gray, J. (2018). *Accessibility Toolkit* (2nd ed.). BCcampus. <https://opentextbc.ca/accessibilitytoolkit/>

The URL is provided to make it easy for people to navigate to the original source. However, it can be frustrating when screen readers read out the full URL for every source. As such, how can we make this link accessible to people using screen readers while still adhering to citation guidelines?

Option 1: WAI-ARIA labels

One solution is WAI-ARIA.⁵ WAI-ARIA allows you to add attributes to HTML to provide instructions that are recognized by assistive technologies. As such, we can hyperlink the URL and use an ARIA label to specify what the screen reader should read aloud. This way, the URL will still appear visually and can be clicked to navigate to the source, but when a screen reader encounters it, it will read out the ARIA label rather than the URL.

Here is what the citation would look like:

5. Thank you to Baldur Bjarnason for sharing this workaround on the Rebus Community help page.

Coolidge, A., Doner, S., Robertson, T., & Gray, J. (2018). *Accessibility Toolkit* (2nd ed.). BCcampus. <https://opentextbc.ca/accessibilitytoolkit/>

Here is what the HTML would look like.

```
<p class="hanging-indent">Coolidge, A.,  
Doner, S., Robertson, T., & Gray, J.  
(2018). <em>Accessibility Toolkit</em> (2nd  
ed). BCcampus. <a aria-label="Accessibility  
Toolkit" href="https://opentextbc.ca/  
accessibilitytoolkit/">https://opentextbc.ca  
/accessibility toolkit/</a></p>
```

Option 2: Link the citation title

If editing HTML is out of your comfort zone, another option is to use the title in the citation as the link text and leave the URL unlinked.

Here is an example:

Coolidge, A., Doner, S., Robertson, T., & Gray, J. (2018). *Accessibility Toolkit* (2nd ed.). BCcampus. <https://opentextbc.ca/accessibilitytoolkit/>

With this method, screen readers would still read out the URL if references were being read through from beginning to end. However, if a person using a screen reader wanted to navigate

through the page by links, they would hear the title rather than the URL.

Provide web addresses in print copies

One thing to keep in mind is that most open textbooks have a print-on-demand option. For that reason, it is a good idea to provide the web address for external links so people using a print copy of the book can find the online content. You can do this by including the web address in-text (Example 1), providing the web address in a footnote (Example 2), or by providing a list of web addresses on a single page in the back matter of the book organized by chapter (Example 3).

Example 1: Information on BCcampus Open Education (<https://open.bccampus.ca>) is available online.

Example 2: Information on BCcampus Open Education⁶ is available online.

Example 3: See the List of Links by Chapter for Print Users in the back matter of this toolkit.

Provide web addresses in Print PDF in Pressbooks

If you are working in Pressbooks, there is an easy workaround that will cause the web address to be included in parentheses immediately after the link text in the Print PDF.

editing marks found in [Purdue's Online Writing Lab \(OWL\) \(https://owl.purdue.edu/owl/purdue_owl.html\)](https://owl.purdue.edu/owl/purdue_owl.html) or elsewhere.)

A screenshot from a Print PDF file showing the name of a website followed by its web address in parentheses.

6. <https://open.bccampus.ca>

All you have to do is add the following to your PDF Custom Styles:⁷

```
.print a::after {
  content: " (" attr(href) ")";
}
```

However, there may be cases where you do not want a web address to be provided in the print copy. For example, the web address for an internal link to a specific chapter is not helpful for people using the print copy. As such, you can edit the Custom Styles to exclude certain links that have a particular class assigned. In this example, we have created a link class called “internal” and asked that all links with `class="internal"` not have their web address provided in the PDF. Note that you will have to add the class to the link’s HTML yourself.

For example, the HTML for an internal link would be edited to look like this:

```
<a                                class="internal"
  href="/accessibilitytoolkit/chapter/
  links/">Links</a>
```

And the Custom Styles would look like this:

```
.print a:not(.internal)::after {
```

7. Thank you to Christina Hendricks for sharing this workaround in her blog post: [Some things I'm learning about accessibility and open textbooks.](#)

```
content: " (" attr(href) ")";  
}
```

For more information on how to edit the Custom Styles for your book, check out the chapter in the *Pressbooks User Guide* on Customizing your Exports with Custom Styles.

Media Attributions

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AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND JOSIE GRAY

In this section, we provide guidelines and recommendations for formatting tables.

What are tables?

In this context, tables refer to *data tables*, which include row and/or column header information to categorize content. (Tables that do not have headers are called *layout tables*.)

File types include: DOCX, HTML, PDF

Are your tables simple or complex?

A simple table includes a maximum of one header column and/or one header row. A complex table includes more than one header column and/or header row, and may include merged or split cells.¹

We recommend you make every effort to keep data tables as simple in structure as possible. The more complex the design of a data table, the less accessible it will be for some students using screen-reading technology to access their textbook materials. Screen readers move left-to-right, top-to-bottom, one cell at a time, and because a screen reader does not repeat a cell, merging or splitting cells can affect the reading order of a table.

1. Penn State, "Tables," *Accessibility*, accessed March 28, 2018, <http://accessibility.psu.edu/tables>.

However, you can use merged or split table cells if they are formatted correctly. Check out this web page to learn more: [Tables Concepts](#)

Who are you doing this for?

This work supports students who:

- Have a form of cognitive disability, like Ann
- Are blind or have low vision, like Jacob



What do you need to do?

In the same way that your content hierarchy needs headings and structure (see [Organizing Content](#)), tables need a properly defined structure to be accessible. This means that you must add row and

column headers to define the different sections of data. Screen readers read tables horizontally—cell by cell, row by row—and row and column headers help give context to the data in each cell for students who are blind, have low vision, or have a cognitive disability.

Create simple tables

A simple table includes:

1. A table title or caption
2. Maximum of one row of column headers and/or maximum of one column of row headers, with the appropriate scope assigned
3. Avoid using merged or split cells
4. Adequate cell padding for visual learners

Example 1: How to Create a Simple Table

The table below is a simple table. Reviewed against the preceding requirements list, this table:

1. Includes a **caption** (Spring Blossoms)
2. Has one row in which cells are tagged as **column headers** (Colour Family, Bulbs, Shrubs, Trees), and one column (beginning on the second row) in which the cells are tagged as **row headers** (Pink, Yellow)
3. Avoids the use of merged or split cells wherever possible
4. Has adequate **cell padding** to provide space buffering around the data in each cell. (Cell padding in this table is set at “10”).

Colour Family	Bulbs	Shrubs	Trees
Pink	Tulips	Flowering currant	Ornamental plum
Yellow	Daffodils	Forsythia	Star magnolia

For a student accessing the table through a screen reader, the first row of data following the column headers will be presented along the lines of:

- Row 2, Colour family, column 1, Pink
- Bulbs, column 2, Tulips
- Shrubs, column 3, Flowering currant

- Trees, column 4, Ornamental plum

Marking cells in the first row and/or column of a table as header cells allows a screen reader to interpret the structure of a table and how cells relate to each other. This, in turn, ensures that someone using a screen reader can navigate through a table and understand what column/row a given cell is in. If a table doesn't have headers, the screen reader will recite cell information starting in the upper left corner and continuing left to right, top to bottom.

How to mark cells and rows as headers

As with section headings, it is not enough to bold or enlarge text in table cells that you want to be marked as headers.

If you are familiar with HTML, you can go into the text editor and change tags to tags. Row-header tags are given the `scope="row"` attribute and column-header tags get a `scope="col"` attribute.² See Example 2 for how to create an accessible HTML table.

For those not comfortable with HTML, here is how you create table row and column headers in Pressbooks.

1. Create your table and fill the cells with data.
2. Select all of the cells that will be your column headers. (This should be all cells in the first row of your table.)

2. "Tables with Two Headers," *Web Accessibility Tutorials*, accessed January 17, 2018, <https://www.w3.org/WAI/tutorials/tables/two-headers/>.

- a. select the table icon from the top menu of the Visual editor: Table icon > Cell > Table cell properties.
 - b. set the “Cell type” to “Header cell.”
 - c. set the “Scope” to “Column.”
3. Select all of the cells that will be your row headers. (This should be all cells in the first column of your table, except for the cell in the first row, which has already been marked as a column header.)
 - a. select the table icon from the top menu of the visual editor: Table icon > Cell > Table cell properties.
 - b. set the “Cell type” to “Header cell.”
 - c. set the “Scope” to “Row.”

How to create a table caption

Select your table, click the Table icon > Table Properties and check “Caption.” Select the space directly above the centre of the table you created and type your caption.

An example of an inaccessible table header would be one that appears either before or after the table, with no markup connecting the title to the table.

Example 2: Accessible HTML Table Markup

```
<table><caption>Table 1.1 Spring Blossoms</caption>
<thead>
<tr>
<th scope="col">Colour Family</th>
<th scope="col">Bulbs</th>
<th scope="col">Shrubs</th>
<th scope="col">Trees</th>
</tr>
</thead>
<tbody>
<tr>
<th scope="row">Pink</th>
<td>Tulips</td>
<td>Flowering currant</td>
<td>Ornamental plum</td>
</tr>
.....
</tbody>
</table>
```

Add a [Skip Table] option

For large data tables, it can be a good idea to add a link which will allow people to skip the content of the table. See Table 2.4 for an example.

Table 2.4. Main Sociological Research Methods.

[Skip Table]

Method	Implementation	Advantages	Challenges
Survey	Questionnaires and interviews.	Yields many responses, can survey a large sample, data can be generalized, and quantitative data are easy to chart.	Can be time consuming, can be difficult to encourage participant response, and captures what people think and believe, but not necessarily how they behave in real life.
Fieldwork	Observation, participant observation, ethnography, case study.	Yields detailed, accurate, and real-life information.	Time consuming, data are often descriptive and not conducive to generalization, researcher bias is difficult to control for, qualitative data are difficult to organize.
Experiment	Deliberate manipulation of social customs and mores.	Tests cause-and-effect relationships.	Hawthorne effect, artificial conditions of research, and ethical concerns about people's well-being.
Secondary data analysis	Analysis of government data (census, health, crime statistics), research of historic documents, and content analysis.	Makes good use of previous sociological information.	Data could be focused on a purpose other than yours, data can be hard to find, and taking into account the historical or cultural context of texts.

As shown, this link is best placed in a row preceding the column headers. That way, someone using a screen reader will hear the caption of the table before being given the option to skip the table.

For more information about creating same page links in Pressbooks, see Hyperlink Material in the *Pressbooks Guide*.

Media Attributions

- Ann: Original artwork by Hilda Anggraeni (BCcampus). © Creative Commons Attribution 4.0 International Licence.
- Table 2.4. “Main Sociological Research Methods” in Introduction to Sociology – 2nd Canadian Edition by William Little. © Creative Commons Attribution 4.0 International Licence.

AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND JOSIE GRAY

In this section, we provide recommendations to guide your inclusion of accessible multimedia content.

What are multimedia?

The term multimedia refers to a variety of ways, or media, used to communicate information, such as videos, audio, animations, and slideshows.

File types used: MP3, MP4, PPT

What types of multimedia are you including?

Before you can determine what you need to do to make media accessible, you must understand what is required for different types of multimedia. Consider the following questions:

1. Does your multimedia resource include audio narration or instructions? If so, you should:
 - provide a complete transcript of all speech content and relevant non-speech content in the resource
2. Does your multimedia resource include audio that is synchronized with a video presentation? If so, you should:

- provide captions of all speech content and relevant non-speech content in the resource
3. Does your multimedia resource include contextual visuals (e.g., charts, graphs) that are not addressed in the spoken content? If so, you should:
- provide audio descriptions of relevant visual materials in the resource

Who are you doing this for?

This work supports students who:

- Are deaf or hard of hearing, like Steven
- Are blind or have low vision, like Jacob
- Have a form of cognitive disability
- Are in a location where they cannot play or hear audio
- Are not native-English speakers and need written-word formats to support understanding



What do you need to do?

Many types of multimedia present information in a non-text manner. For students unable to use the original version of these formats, providing text as a transcript, caption, or written description gives them access.

Transcripts

Consider what your students would get out of your multimedia resource if they were not able to hear the audio portion, or if they had difficulty understanding the spoken word. A text transcript provides students with equivalent information to the audio content in a multimedia resource.¹

As you work on developing a text transcript, keep in mind the following recommendations about what to include:

- Speaker's name
- All speech content. If there is speech that is not relevant, it is usually best to indicate that it has been excluded from the transcript, e.g., “[A & B chatted while slides were loading].”
- Relevant descriptions about the speech. Descriptions that convey emotions and mood are usually provided in brackets, e.g., “Don't touch that! [shouted].”
- Descriptions of relevant non-speech audio. These are usually provided in brackets, e.g., “[metal pipes crashing to concrete

1. "Web Content Accessibility Guidelines (WCAG) 2.0: Guideline 1.2," W3C, <http://www.w3.org/TR/WCAG20/#media-equiv> (accessed April 17, 2018).

- floor].” Background noise that isn’t relevant can be left out.
- Headings and sub-headings. Headings help when they make a transcript more usable or easy to navigate, especially when the transcript is long. When included, put headings in brackets to show they were not part of the original audio, e.g., [Introduction]; [Group Discussion]; [Case Study].

Transcripts and Third-Party Videos

If you are not producing your own video resource but are planning to embed video materials from a third-party source (e.g., YouTube), be aware that not all third-party videos include transcripts. While services like YouTube technically support transcripts, not all of their contributors include them. If you select a video resource that does not already have a transcript, you will need to produce one yourself.

Creating a transcript for a third-party video might infringe on copyright, depending on how the video has been licensed. Before producing a transcript for media materials you did not create, contact the copyright holder of that material for permission to do so. (See information about using YouTube in Pressbooks in the *Pressbooks Guide*.)

Captions

Captions are the text that is synchronized with the audio in a video presentation. Captions are important when people need to see what's happening in the video and get the audio information in text at the same time.

The work you put into creating a text transcript for a video resource can be repurposed to provide captions. Keep in mind the following recommendations about what to include in your captions:

- All speech content. If there is speech that is not relevant, it is usually best to indicate that it has been excluded from the captions, e.g., “[A & B chatted while slides were loading].”
- Descriptions of relevant non-speech audio. These are usually provided in brackets, e.g., “[metal pipes crashing to concrete floor]”; “[background music by XXX plays].” Background noise that isn't relevant can be left out.

Audio descriptions

Consider what your students would get out of a multimedia resource if they were not able to see embedded visual materials critical for comprehension. Audio descriptions are helpful if visual content (e.g., a chart or map) in a video or presentation provides important context that is not available through the audio alone.²

2. "Web Content Accessibility Guidelines (WCAG) 2.0: Guideline 1.2.3," W3C, accessed April 17, 2018, <http://www.w3.org/TR/WCAG20/#media-equiv>.

When describing visual elements in your multimedia resources, keep in mind the following recommendations and guidelines:

- When contextual visual content on the screen is not described in the audio itself, you will need to provide an objective audio description of the visual element.
- Whenever possible, avoid creating the need for audio descriptions in the first place by being proactive at the time of recording. If you pay attention to contextual visuals while recording, you may find opportunities to convey the visual content with the accompanying spoken material instead of inserting audio descriptions of the visual content after the fact.

Example 1

To help students fully grasp a concept that you are trying to convey in your video, you have included some contextual visual references (e.g., maps, charts, physical demonstrations of a process). However, you realize, after making the video, that the audio portion does not describe these visuals in enough detail for a student, like Jacob, to be able to access all of the concepts you intended to convey.

In this case, you would need to record an audio description of the visual material that provides enough detail so students, like Jacob, have the same content available to visual learners.

Example 2

You are recording a video or presentation that includes a chart that tracks coal production in British Columbia, and as part of the presentation you want to focus on specific data in the chart. The narrator or presenter might point to sections on the chart and say:

“As you can see, metallurgical coal projection increased by three million tonnes over these two years.”

In this case, audio descriptions would be necessary to provide the missing context to students with visual disabilities; these students cannot see the data on the chart that tells visual learners what the production figures are and for what dates. However, if the narrator or presenter instead says:

“This chart illustrates that metallurgical coal production in B.C. increased from 23 million tonnes in 1999 to 26 million tonnes in 2001,”

the visual content is conveyed through the audio and no audio description will be necessary.

Media Attributions

- Steven: “WFE005: Steven” by Rosenfeld Media is used under a Creative Commons Attribution 2.0 Generic Licence.

Learning Objectives

By the end of this chapter, you should be able to:

- Provide three examples of ways an OER can be checked for accessibility.
- Explain how Universal Design for Learning is a good practice for both pedagogy and accessibility.

Accessibility is one of the things that will determine the usability of an OER for learners with diverse needs. Exemplary OER borrow many best practices from web design, ensuring that content is readable and works as intended for all users.¹

W3 Schools defines web accessibility as:

“Web accessibility means that people with disabilities can use the Web. More specifically, Web accessibility means that people with disabilities can perceive, understand, navigate, and interact with the Web, and that they can contribute to the Web. Web accessibility also benefits others, including older people with changing abilities due to aging.”²

1. **Attribution:** This chapter was adapted in part from The ABOER Starter Kit, by Technologies in Education at the Faculty of Education, the University of Alberta, licensed CC BY 4.0.
2. W3 Schools. "Web Accessibility." Accessed May 15, 2019. <https://www.w3.org/WAI/bcase/soc.html#of>



One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://openbook.ums.edu.my/iotb/?p=272#oembed-1>

Attribution: “Open Dialogues: Open education and accessibility” by CCTL, University of British Columbia [Youtube] is licensed CC BY 4.0.

Universal Design for Learning

Apart from more traditional aspects of accessibility, you can also make your course more accessible through the way(s) in which you present that content. One method is **Universal Design for Learning** (UDL), “a framework to improve and optimize teaching and learning for all people based on scientific insights into how humans learn.”³

UDL claims that you can improve education for all learners by providing multiple ways of engaging with your course’s content. There are various ways to implement UDL in your teaching:

1. Represent ideas from different angles and in different media types to accommodate the diverse needs of learners.
2. Provide support for students to express their understanding of concepts in different ways.
3. Allow students to engage in different ways by providing a variety of assignment types.⁴

3. CAST. "About Universal Design for Learning." Accessed July 15, 2019. <http://www.cast.org/our-work/about-udl.html>

As the BC Campus OER Accessibility Toolkit (2015) argues, UDL principles can be applied to accessibility as well as learning. The toolkit provides the following examples for instructors:⁵

- Design resources that can be accessed by learners in a variety of ways. If there is a text component, provide the ability to enlarge the font size or change the text color.
- Provide multiple ways for learners to engage with information and demonstrate their knowledge.
- Identify activities that require specific sensory or physical capability and for which it might be difficult to accommodate the accessibility needs of learners (e.g., color matching activities).

Universal Design for Learning and **Universal Design** are two separate but interrelated concepts. While UDL is intended to improve both the accessibility and pedagogy of a learning environment, UD is primarily intended as an approach to making content accessible to as many people as possible.⁶ We focus on UDL in this chapter because the design of open educational resources is inextricably connected to how they will be implemented as learning objects. As an educator, thinking about UDL as a process tied to the creation, sharing, and use of course content is essential.

4. CAST. "Universal Design for Learning Guidelines Version 2.2," 2018. Accessed July 1, 2019. <http://udlguidelines.cast.org/>

5. Coolidge, Amanda, et al. *Accessibility Toolkit – 2nd Edition*. Victoria, BC: BCcampus, 2015. <https://opentextbc.ca/accessibilitytoolkit>

6. Edyburn, Dave L. *Accessible Instructional Design*. Bingley: Emerald Group Publishing Limited, 2015.

Software & File Format Choice

The usability of an OER is heavily impacted by how easily users can access it.⁷ Two aspects of content design that are inherently tied to accessibility are a resource's file format and the software used to access it.

Choose open file formats

If someone wants to read your work, they need to be able to open the file on their computer; however, some file formats require specific proprietary software to open. Saving your work in open file formats can give your students more options for accessing their course content on whatever platform best meets their needs.

Examples

- Open formats: HTML, ePub, RTF, Mobi, PNG, XML, PDF, Markdown
- Proprietary formats: MS Word, Pages, PowerPoint, Keynote

7. **Attribution:** "Software & File Format Choice" was adapted from "Accessibility webpage" by Affordable Learning Georgia and UH OER Training by Billy Meinke, licensed CC BY 4.0.

- Markdown converter tool: The University of Oklahoma Libraries' Markdown Converter can be used to easily convert your Markdown text into most other formats.

Use accessible software

Some software used to create or display content disables accessibility features built into your computer's operating system, such as zoom, text-to-speech, and speech-to-text. It is important to check whether the software students will use to view your course content disables the accessibility features of their computer's operating system. This can be an issue both for OER and for traditional, publisher-provided course content.

Considerations

- Is the software used to view the OER compatible with most assistive devices?
- Does the software require point-and-click interaction to work properly?
- Can the software menus be “seen” and properly interpreted by screen readers?

How to check software accessibility

- Check common assistive keyboard shortcuts while using the

software.

- Ensure that users can navigate content using only the keyboard if necessary.
- Enable OS accessibility features and check their effectiveness with the required software.

How to access common accessibility features

- Windows accessibility features
- Mac OS X accessibility features

Image & Text Readability

Whenever you are presenting content to students, it's important to check whether the text in your course content is recognizable to a computer **as text**. For PDFs, accurate optical character recognition (OCR) is often required to make the text understandable. Screen-readers require this information to accurately relay text back to students. Other best practices for making course materials readable are listed in the sections below.

Use heading levels (h1, h2, h3)

Text-based OER should always have a clear and logical structure. Using headings and other structural elements to organize your resource can make it easier for all learners to access and understand the material. Many editing tools support table of contents (TOC) generation based on where these section markers are placed. This can help students navigate to a specific chapter or

section of a text, especially if the digital version of the resource has its TOC hyperlinked to each section within the text.

Individuals using screen readers can also more easily navigate the sections of your content when headings levels have been applied consistently.

Use true lists

While they may “look” similar to bulleted lists, using asterisks or icons to create a visual list of items can confuse a screen reader that is expecting to encounter structured content. Whenever listing items, use the true list features of your content editor, such as bullet points or numbered lists.

Examples

Good example:

- First list item
- Second one

Bad example:

- * First list item
- * Second item

Provide alt text & captions

No matter the subject of an image used in your content, you need to offer descriptive text. A screen reader will look for a contextual description of an image to share with readers, which should live in the text surrounding the image (title or caption) or as **alternative (“alt”) text**. This is one of the most commonly overlooked aspects of accessibility for instructional content, but most text editors include tools for adding alt text to images.

When adding alt text to an image, be sure to clearly and succinctly describe the most important elements for the student to know. Do not include extraneous detail. In some cases, you do not need to add alt text at all, as in the case of purely decorative images.

Examples

- Necessary descriptive alt text: “Part a of the figure shows a container which has a gas of volume $V_{\text{subscript 1}}$ on the left side and nothing on the right side. Part b shows a container which is completely filled with a gas of volume $V_{\text{subscript 2}}$.”
- Too much descriptive alt text: “There is a figure with a white background and two squares labeled a and b. Part a has a rectangle (representing a container) with a shaded grey section on the left half of the container with dots representing a gas. The gas is labeled $V_{\text{subscript 1}}$. Part b...”
- Unnecessary descriptive alt text: “An icon of a person smiling – I put this here as a cute picture to liven up the page!”

Video and audio content needs descriptive text as well, but these usually take the form of captions or, in the case of podcast recordings, transcripts. You can easily add captions to videos using Canvas' Arc tool or by using YouTube's built-in editor tools. For more help with this process, read through the excellent Captioning Videos guide from the University of Washington or reach out to an instructional designer near you.

Use descriptive link text

Ensure that all web pages and links have titles that describe a topic or purpose. The purpose of the link can be determined by the text alone. That is, you don't need to include additional information justifying the use of the link. You want the link to be meaningful in context. For example, do not use generic text such as "click here" or "read more" unless the purpose of the link can be determined by meaning in the surrounding content.

Examples

Digital OER should have descriptive links that explain to where the hyperlink is going to navigate the reader.

- Good example: Information on the BC Open Textbook Project is available online.
- Bad example: Click here for information on the BC Open Textbook Project.

If the OER design does not permit the inclusion of explicit links

in the text, implicit links can be used, and a more detailed list of sources should be provided at the end of the resource or in a separate document. Footnotes are a great way of providing more explicit links for content without cluttering the text on a page.

Use Accessible Fonts & Colors

OER should be readable for those with disabilities related to color as well. Some best practices for ensuring that fonts and colors are accessible are described below:

- Use dyslexic-friendly fonts, such as Arial, Century Gothic, Open Sans, and Verdana. Your institution might recommend certain fonts for digital and print materials. These recommended fonts are usually chosen for ease of use and accessibility and may be a good fit for your needs as well.
- Make sure there is a clear contrast between colors (e.g. between the background and font color, or between separate colors on a graph). There are many free online tools available for checking color contrast, but we recommend WebAim's Color Contrast Checker and ContrastChecker.com.
- Do not use color to communicate meaning without other markers of that meaning present. If you have color-dependent information in images or within the text of your resource, be sure that either alternative methods of recognition (such as differing patterns) are present, or that the contrast can be adjusted by users.

Online Accessibility Tools

A great deal of OER content is displayed on websites, where we can

use accessibility-checking tools to identify areas that can make it difficult for assistive technology tools to work properly. The online WAVE tool does just that: identifying errors and possible issues with the accessibility of websites.

The Flexible Learning for Open Education (floe) website provides access to a suite of tools intended to “supports learners, educators and curriculum producers in achieving one-size-fits-one learning design for the full diversity of learners.”⁸

8. For more information, see floe's Inclusive Learning Design Handbook online at <https://handbook.floeproject.org/> or visit their source code on GitHub: <https://github.com/fluid-project/>

AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND JOSIE GRAY

In this section, we review how to add accessible formulas to content.

What are formulas?

Formulas refer to math equations and science formulas.

File types used: LaTeX, MathType

Who are you doing this for?

This work supports students who:

- Are blind or have low vision
- Have a form of cognitive disability, like Mark
- Have a physical disability



What do you need to do?

There are several ways to handle equations, from images with alt tags to MathML. Having access to an equation editor such as MathType or MathMagic can streamline processing and converting equations. These tools are similar to equation editors found in the Microsoft Office.

MathML

Math ML is a text-based XML (short for “extensible markup language”) designed for math equations. Browsers that support MathML are able to translate the XML into a formatted equation. Since MathML with MathJax can be rendered in many systems, including HTML, sites at Penn State, Angel and Drupal, it is considered the best choice for accessibility.

Here is information about creating and viewing MathML.

MathML may vary from system to system and the content can change rapidly.

Image with an alt tag

A safe option is to create an image of an equation (or export it from an equation editor) and then insert the image into a document with an alt tag.

Note: Alt tags can be written in Nemeth MathSpeak for students who have learned that system.

Example 1: An equation in HTML

$$m = \frac{m_0}{\sqrt{1 - \frac{v^2}{c^2}}}$$

View the alt tag

alt = "m equals begin fraction m sub 0 over begin square root 1 minus begin fraction v sup 2 over c sup 2 end fraction end square root end fraction"

LaTeX

LaTeX is a math markup language familiar to many in the science and math community. Unfortunately, it is not currently supported by screen reader technology. It is, however, fairly simple to convert LaTeX to an image or MathML in most equation editors.

To import LaTeX, follow these steps in MathMagic and MathType:

1. Copy a piece of LaTeX code such as
$$m = \frac{m_0}{\sqrt{1 - \frac{v^2}{c^2}}}$$
into an equation editor's main editing window.
 2. The equation should appear fully formatted. Make minor adjustments as needed.
-

At a BCcampus user-testing session, students indicated that it would be helpful to place an audio file of the formula or equation alongside each, allowing the user to hear exactly how the formula or equation should be interpreted.

Example 2: An equation with audio

$$m = \frac{m_0}{\sqrt{1 - \frac{v^2}{c^2}}}$$



One or more interactive elements has been excluded from this version of the text. You can view them online here:
<https://openbook.ums.edu.my/iotb/?p=276#audio-276-1>

Additional resources

Math accessibility at Portland Community College

In 2012, Portland Community College departments took a closer look at making math accessible to blind students. Read more about the math accessibility study.

Watch Math Accessibility at Portland Community College. (This video is an open educational resource.)

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Text Attributions

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AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND JOSIE GRAY

In this section, we review the two main concerns regarding font size on the web.

What is font size?

Font size is the size of text visible on the screen.

Who are you doing this for?

This work supports students who:

- Are blind or have low vision, like Diana
- Have a form of cognitive disability
- Are deaf or hard of hearing
- Have a physical disability



What do you need to do?

There are two main concerns when working with font sizes:

1. Ensuring that default font sizes are not too small.
2. Ensuring that text can be expanded to 200% on websites.¹

Keep in mind these recommendations and guidelines:

- Use 12 point for body text. For most documents, body text should be around 12 points. Small fonts may be illegible for some audiences.
- Use 9 point for footnotes. If a document contains footnotes or endnotes, the minimum size should be 9 points.
- The Web Content Accessibility Guidelines (WCAG 2.0) recommend ensuring that text can be zoomed to 200%. As well, we recommend using liquid layouts² that can accommodate 200% text.

1. "Font Size on the Web," *Accessibility and Usability at Penn State*, accessed April 17, 2018, <http://accessibility.psu.edu/fontsizehtml/>.
2. Liquid layout are layouts that are based on percentages of the current browser window's size. They flex with the size of the window, even if the current viewer changes their browser size as they're viewing the site. Liquid width layouts allow a very efficient use of the space provided by any given web browser window or screen resolution.

Media Attributions

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AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND JOSIE GRAY

In this section, we provide guidelines and recommendations about colour contrast in your textbook materials.

What is colour contrast?

Colour contrast refers to the hue, lightness and saturation of text, images, and background.

File types include: DOCX, HTML, PDF, JPG, GIF

What role does colour play in the delivery of your content?

When documents or web pages do not provide enough contrast between foreground elements (e.g., text, images) and background elements (e.g., colour, watermark images), some students will have difficulty reading the content. Consider the following questions:

1. Have you presented text- or image-based content on a coloured or textured background? If so, you should:
 - confirm that there is sufficient contrast between your foreground content and the chosen background colour or texture
2. Have you included links in your content? If so, you should:

- confirm that the colour of your web links is distinct from both your background colour and the colour of the surrounding text
3. Have you used colour to convey concepts or information? If so, you should:
- confirm that you are not using colour alone to convey this information

Who are you doing this for?

This work supports students who:

- Have low vision, like Diana
- Have poor contrast vision
- Are colour blind and cannot differentiate between certain colours
- Use a device with monochrome display
- Use a print copy that is in black and white



What do you need to do?

In order to use colour in a way that is most accessible, take into account colour contrast between text and background, and whether or not colour is used to convey information and the location of a link.

Contrast

Students with low vision and/or a form of colour blindness may have difficulty reading text that does not contrast enough with the background colour selected. If the colour palette you have adopted is too subtle (e.g., white text on a pastel background; medium-grey text on a light-grey background), the contrast between your foreground and background is probably insufficient for some students.

Level AAA of the “Web Content Accessibility Guidelines (WCAG 2.0)” requires that “the visual presentation of text and images of text has a contrast ratio of at least 7:1.”¹ The following image presents four different foreground/background colour-contrast examples to illustrate insufficient and sufficient colour contrast ratios.

1. WCAG defines three levels of minimum accessibility standards: A, AA, and AAA. AAA outlines the highest level of minimum standards for web accessibility. Large text can have a lower contrast ratio (4.5:1). In addition, text that conveys no information or is part of a logo has no colour contrast requirements. See “Web Content Accessibility Guidelines (WCAG) 2.0, Guideline 1.4.6 Contrast (Enhanced),” WC3, accessed February 28, 2018, <http://www.w3.org/TR/UNDERSTANDING-WCAG20/visual-audio-contrast7.html>.



Image displays four examples of different font colour against different background colours; only one of the sample combinations provides sufficient colour contrast.

How to Test Your Materials for Colour-Contrast Ratios

There are many online and downloadable tools available to help you evaluate colour-contrast ratios. Here are a few we have tried and like:

- WebAIM's Color Contrast Checker: This web-based tool allows you to select or enter colour values to test, and provides you with a "pass" or "fail" on your contrast ratio.
- ACART's Contrast Checker: This is a straightforward, web-based tool you can use to both check colour contrast and view your selections in grey scale. This tool also allows you to keep a history of the colour combinations you have tested.
- Giacomo Mazzocato's Accessibility Color Wheel: This web-based tool includes several options for testing your colour selections, including

simulations of three types of colour blindness. You can also opt to test what your contrast ratio is when the foreground and background colour selections are inverted.

Link colours

Links must be visually distinct from both the surrounding, non-linked text and the background colour. If you do not underline your links (or provide some other non-colour cue), you must ensure that you provide both sufficient contrast between the link and background colours *and* between the link colour and that of the surrounding text.

Web Content Accessibility Guidelines (WCAG 2.0) require a:

- 4.5:1 contrast between the link text colour and the background
- 3:1 contrast between the link text colour and the surrounding non-link text colour²

High-contrast mode

Some students need to see light text on a dark background for it to be readable, while others require dark text on a light background. Students with low vision (like Diana) must be able to

2. "WCAG 2.0 and Link Color," *WebAIM*, accessed June 7, 2018, <http://webaim.org/blog/wcag-2-0-and-link-colors/>.

see content when it is displayed in high-contrast mode. This can be a subjective experience, based on individual student needs. We recommend testing your text- and image-based content as you go by using high-contrast mode on your own computer and making adjustments as needed.

All content items such as text, images, bullets, and table borders must be visible in both regular and high-contrast modes.

How to Test Your Content in High-Contrast Mode

To test the visibility of your content in this mode, turn on high contrast by simultaneously pressing the following keys on your (PC) keyboard:

Left ALT + Left SHIFT + Print Screen.

To turn off high contrast mode, repeat this step.

Use of colour

You should not rely on colour as the sole means of conveying information and instruction. If the point you are making depends on colour to be understood, you will need to edit your materials so that concepts presented in the visuals are not lost to those who are colour blind or who require high contrast between colours.³

3. "Web Content Accessibility Guidelines (WCAG) 2.0, Guideline 1.4.1 Use of Color," WC3, accessed June 7, 2018, <http://www.w3.org/TR/WCAG20/#visual-audio-contrast>.

For more information on using colour to convey information, see the Images chapter.

Media Attributions

- Diana: Original artwork by Hilda Anggraeni (BCcampus). © Creative Commons Attribution 4.0 International Licence.

Organizing content

- Content is organized under headings and subheadings.
- Headings and subheadings are used sequentially (e.g., Heading 1, Heading 2).

Images

- Images that convey information include alternative text (alt text) descriptions of the image's content or function.
- Graphs, charts, and maps also include contextual or supporting details in the text surrounding the image.
- Images do not rely on colour to convey information.
- Images that are purely decorative do not have alt text descriptions. (Descriptive text is unnecessary if the image doesn't convey contextual content information).

Links

- The link text describes the destination of the link and does not use generic text such as "click here" or "read more."
- If a link will open or download a file (like a PDF or Excel file), a textual reference is included in the link information (e.g., [PDF]).
- Links do not open in new windows or tabs.

- If a link must open in a new window or tab, a textual reference is included in the link information (e.g., [NewTab]).
- For citations and references, the title of the resource is hyperlinked, and the full URL is not hyperlinked.

Tables

- Tables are used to structure information and not for layout.
- Tables include row and column headers.
- Row and column headers have the correct scope assigned.
- Tables include a caption.
- Tables avoid merged or split cells.
- Tables have adequate cell padding.

Multimedia

- All audio content includes a transcript. The transcript includes all speech content and relevant descriptions of non-speech audio and speaker names/headings where necessary.
- Videos have captions of all speech content and relevant non-speech content that has been edited by a human for accuracy..
- All videos with contextual visuals (graphs, charts, etc.) are described audibly in the video.

Formulas

- Equations written in plain text use proper symbols (i.e., -, ×, ÷).¹

- For complex equations, one of the following is true:
 - They were written using LaTeX and are rendered with MathJax (Pressbooks).
 - They were written using Microsoft Word's equation editor.
 - They are presented as images with alternative text descriptions.
- Written equations are properly interpreted by text-to-speech tools.²

Font size

- Font size is 12 point or higher for body text in Word and PDF documents.
- Font size is 9 point for footnotes or endnotes in Word and PDF documents.
- Font size can be enlarged by 200 per cent in webbook or ebook formats without needing to scroll side to side.

All open textbooks from the OpenStax collection are accessible according to this accessibility statement.

1. For example, a hyphen (-) may look like a minus sign ($-$), but it will not be read out correctly by text-to-speech tools.
2. Written equations should prioritize semantic markup over visual markup so text-to-speech tools will read out an equation in a way that makes sense to auditory learners. This applies to both equations written in LaTeX and equations written in Microsoft Word's equation editor.

About the “Redesign or Accommodation” activity

We have grounded the “Redesign or Accommodation?” activity in student-centred Universal Design for Learning (UDL)—a framework that recognizes that we cannot design learning experiences for a specific type of student.

“Redesign or Accommodation?” also incorporates the humanizing element of student *Personas*, some who you will recognize from this accessibility toolkit. Each participant adopts a *Persona* and advocates from that student’s perspective when presented with a *Scenario* that is based on common or recurring components of course delivery.

In facilitated discussions, participants identify potential barriers that the *Scenario* presents for their *Persona*-selves, consider what accommodations to address the barrier would look like—and if their *Persona* would even qualify to receive one, and then determine if the barrier/s could be avoided entirely by applying a UDL-based redesign to the course components in question.

We have created several *Scenarios* for this activity, but we also recommend you try running *Scenarios* arising from your own practice and within your own institution against your *Persona*-based selves; it may help to proactively identify and address barriers before they affect your students.

Below are assorted “Redesign or Accommodation?” activity materials.

- Redesign or Accommodation Activity Guidelines [PDF file]
- Redesign or Accommodation Scenarios [PDF file]

Personas

- Redesign or Accommodation Persona Cards (Detailed) [PDF file]
- Persona Cards for Printing [PDF file]
- Additional Personas for Course Design by OSU Ecampus [PDF file]

Attributions

Thank you to the University of Prince Edward Island (*Alex, Khaleed, Maridee, and Natalie*) for developing and contributing four new persona to the “Redesign or Accommodation?” activity, a collaborative effort between UPEI’s Accessibility Services and the E-Learning Office. And thank you to Elisabeth McBrien and Heather Garcia of Oregon State University for creating an additional set of personas to facilitate accessible and inclusive course design.

AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND
JOSIE GRAY

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ABBEE ELDER; AMANDA COOLIDGE; SUE DONER; TARA ROBERTSON; AND JOSIE GRAY

5Rs

A derivative term providing a shortcut to identify the conditions of open when OER are used.

The 5 R's are: retain, reuse, revise, remix and redistribute.

("ASCCC OERI – OER Basics" by Rachel Arteaga and Suzanne Wakim is licensed under CC BY 4.0)

Accessibility

Accessibility can be viewed as the "ability to access" something. The concept of accessible design and practice of accessible development ensures both "direct access" (i.e. unassisted) and "indirect access" meaning compatibility with a person's assistive technology (for example, computer screen readers).

("Wikipedia" is licensed under CC BY-SA 3.0)

Accommodation

A change that is made so that a person with a disability is able to fully participate or access information.

Accommodations

Accommodations are adaptations or changes in educational environments or practices that help students overcome the barriers presented by their disability. Two areas in which accommodations can be used are instruction and testing. Instructional accommodations are changes to the delivery of classroom instruction or the accompanying materials. Instructional accommodations change how students learn but do not change what they learn. Testing accommodations are changes to the format of a test or its administration procedures. Testing accommodations change

how students are tested but do not change what a test measures. IRIS Center at Vanderbilt University

Alt text

Short for *alternative text*. A text caption, associated with an image or other element, that is rendered if the usual content cannot be rendered. ("Wiktionary" is licensed under CC BY-SA 3.0)

Assistive Technologies (AT)

Assistive technology is any item, piece of equipment, software program, or product system that is used to increase, maintain, or improve the functional capabilities of persons with disabilities. Assistive technology helps people who have difficulty speaking, typing, writing, remembering, pointing, seeing, hearing, learning, walking, and many other things. Different disabilities require different assistive technologies. Examples include low-tech: communication boards made of cardboard or fuzzy felt, special-purpose computers, hardware: prosthetics, mounting systems, and positioning devices, special switches, keyboards, pointing devices, screen readers, communication programs, electronic devices, wheelchairs, educational software, power lifts, pencil holders, eye-gaze and head trackers. Assistive Technology Industry Association

Attribution

The process by which a content user gives proper credit to the original creator of a work when a portion of that work is reused or adopted outside of its original context. Attribution typically includes a link to the original work and information about the author and license. (Adapted from "Wikipedia" is licensed under CC BY-SA 3.0)

Backward design

A method of designing an educational curriculum by setting goals before choosing instructional methods and forms of assessment. ("Wiktionary" is licensed under CC BY-SA 3.0)

Co-creation

Co-creation or co-designing is a learning process whereby knowledge consumption and knowledge creation are parallel processes. It is often realised in education by renewable assignments such as the creation of open textbooks by students. (Adapted from "A Guide to Making Open Textbooks with Students" by Rebus Community is licensed under CC BY 4.0). See also Renewable assessment.

Creative Commons

A set of open licenses that allow creators to clearly mark how others can reuse their work through a set of four badge-like components: Attribution, Share-Alike, Non-Commercial, and No Derivatives. ("The OER Starter Kit " by Abbey Elder is licensed under CC BY 4.0)

Disability

Any impairment, or difference in physical, mental, intellectual, cognitive, learning, or communication ability. Disabilities can be permanent, temporary, or episodic (meaning that the impact of the disability can change over time). There are different types of disabilities, including physical, vision-related, hearing-related, and cognitive disabilities. The specifics of a disability vary by person and a person can have more than one disability.

Disposable assignment

An assessment task which has no utility after the student has

completed it. (Adapted from "What is Open Pedagogy?" by David Wiley is licensed under CC BY 3.0)

Diversity

The quality of being diverse or different; difference or unlikeness. ("Wiktionary" is licensed under CC BY-SA 3.0)

Equality and Equity

Equality is when each individual or group of people is given the same resources or opportunities. Equity is when each individual or group of people is given resources or opportunities that account for imbalance in social systems. Equity aims for equal outcomes.

Inclusive design

Design that considers the full range of human diversity with respect to ability, language, culture, gender, age and other forms of human difference.

Inclusivity

The practice or policy of providing equal access to opportunities and resources for people who might otherwise be excluded or marginalized, such as those having physical or mental disabilities or belonging to other minority groups. A pedagogical practice that relates to both inclusive education and progressivist thinking is Universal Design for Learning (UDL). This method of teaching advocates for the removal of barriers in the physical and social environments that students of all abilities are within, as this is the main reason why students are unable to engage with the material presented in class. (Adapted from "Wikipedia" is licensed under CC BY-SA 3.0)

OER

Teaching, learning, and research materials that are either (a) in the public domain or (b) licensed in a manner that provides everyone with free and perpetual permission to engage in the 5 R activities. (Source: "Open Education" by Creative Commons, is licensed under CC BY 4.0)

OER-enabled pedagogy

The set of teaching and learning practices that are only possible or practical in the context of the 5R permissions that are characteristic of OER. (Source: "International Review of Research in Open and Distributed Learning" by David Wiley and John Hilton, is licensed under CC BY 4.0)

Open Education

Resources, tools and practices that employ a framework of open sharing . (Source: "About the Open Education Consortium" by Open Education Consortium is licensed under CC BY 4.0)

Open Educational Practices

Practices which encourage the development of openness, community engagement, transparency, responsibility, sharing, and accountability in education. (Adapted from "Open Education Practices: A User Guide for Organisations/Resources and Practices" by Otago Polytechnic, Open Education Practices: A User Guide for Organisations and Individuals is licensed under CC BY-SA 4.0)

Open Educational Resources

Teaching, learning, and research materials that are either (a) in the public domain or (b) licensed in a manner that provides everyone with free and perpetual permission to engage in the

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Open licence

A copyright licence which grants permission for all users to access, reuse, and redistribute a work with few or no restrictions. ("The OER Starter Kit " by Abbey Elder is licensed under CC BY 4.0)

Open pedagogy

A set of pedagogical practices that include engaging students in content creation and making learning accessible to all. ("The OER Starter Kit " by Abbey Elder is licensed under CC BY 4.0)

Open textbook

An openly licensed and free to access textbook; an OER meant to be used as a textbook for a course. ("The OER Starter Kit " by Abbey Elder is licensed under CC BY 4.0)

Othering

The process of perceiving or portraying someone or something as essentially alien or different ("Wiktionary" is licensed under CC BY-SA 3.0)

Persona

A fictional user-type created to represent real people that might use your service, product, or site. Creating multiple and diverse personas can help you recognize different needs and expectations of potential users.

Public Domain

A work which is not covered under copyright law, whose copyright has expired, or which has been dedicated to the

public domain by its rightsholder is said to be in the public domain. ("The OER Starter Kit " by Abbey Elder is licensed under CC BY 4.0)

Renewable assessment

Assessment tasks in which each student cohort creates or contributes to openly created work, developing an ongoing body of knowledge and which value outside the creators' learning experience. (Adapted from "Wiley, D., & Hilton III, J. L. (2018). Defining OER-enabled pedagogy. *International Review of Research in Open and Distance Learning*, 19(4)." is licensed under CC BY 4.0)

Renewable assignment

An assignment task which forms part of renewable assessment. (Adapted from "Wiley, D., & Hilton III, J. L. (2018). Defining OER-enabled pedagogy. *International Review of Research in Open and Distance Learning*, 19(4)." is licensed under CC BY 4.0)

Universal Design

A process intended to design products that are usable by all people, with or without disabilities, to the greatest extent possible. (Adapted from "Wikipedia" is licensed under CC BY-SA 3.0)

Universal Design for Learning

UDL is a framework of learning and teaching based on neuroanatomy and functional neuroimaging research techniques. UDL resists a one-size-fits-all approach to education and posits instead that teachers, educators, and instructional materials should effectively respond to individual differences inherent within a learning environment. Across learning goals, methods, materials, and assessments, Universal Design for Learning encourages offering—

Multiple means of representation to give learners various ways of acquiring information and knowledge,
Multiple means of expression to provide learners alternatives for demonstrating what they know, and
Multiple means of engagement to tap into learners' interests, challenge them appropriately, and motivate them to learn.

Using UDL principles in a classroom removes obstacles to curriculum access and provides students with alternative methods to demonstrate what they know. It acknowledges that there is more than one way to learn and respects individual learning differences. CAST's About UDL

Web Content Accessibility Guidelines (WCAG)

Web Content Accessibility Guidelines is developed with a goal of providing a single shared standard for web content accessibility that meets the needs of individuals, organizations, and governments internationally. The guidelines make web content more accessible, primarily for people with disabilities. The World Wide Web Consortium (W3C)/Web Accessibility Initiative (WAI)