# Introduction

Hello! Thank you for joining us. My name is Arianna Cheveldave, and I’m Coordinator, Open Education for BCcampus.

Today, I will be going over some more advanced topics in Pressbooks, building off of the Introduction to Pressbooks webinar that was held earlier this month.

You can view a [recording of the Introduction to Pressbooks webinar](https://bccampus.ca/event/oer-production-series-introduction-to-pressbooks/) on its event page.

Before I begin, I would like to acknowledge that I am coming to you today from the unceded, ancestral territories of the Musqueam, Squamish, and Tsleil-Waututh peoples, commonly known as Vancouver. I am so grateful to live where I can walk to the ocean, be shaded by tall trees, and gaze at the mountains. I have much to learn still about the atrocities committed against Indigenous peoples to colonize this land for my benefit. I thank the local nations for their hospitality and am committed to educating myself further on Indigenous history and modern issues.

Today’s presentation will consist mainly of me sharing my screen as I navigate through and add content to a Pressbooks web book called *Introduction to Crochet*. I’ll be showing you some things in the book that are all ready to go, and I’ll also be creating new content. This webinar is being recorded, and a folder with resources for the webinar will be shared with you.

*Go to book’s Introduction*. Topics included today are:

* basic H5P
* LaTeX
* internal links and anchors
* the glossary tool
* footnotes
* importing content
* adding users and user roles
* theme options
* book information

# H5P

[H5P](https://h5p.org/) is a tool that allows you to create interactive, reusable content that you can embed on the web, including in a Pressbook. H5P activities are useful for formative assessment, which I am told is the kind of activities you do when you’re still learning a topic. This is as opposed to summative assessment, which is when you’re being tested on what you are already supposed to know, like in an exam.

H5P activities come with a reuse button and a place to embed copyright information, so they are ideal for OER.

There are many different H5P content types, such as:

* Multiple Choice
* Sort the Paragraphs
* Image Hotspots
* Flashcards
* Timeline
* Interactive Video
* And much more

I’m going to show you an activity I’ve created, and then I’ll take you behind the scenes to look at the editor that I used to make it.

## Multiple Choice

Here we have a [Multiple Choice H5P activity](https://h5p.org/multichoice). This activity presents a question to learners that they may answer by selecting one of the possible answers. Learners may check their answers and receive feedback as to why their answer was correct or incorrect. A question can be answered multiple times until the right answer is achieved. You can also limit the learner to only one attempt at the question, if you wish.

The Multiple Choice activity only allows for one question. If you want to include several questions in one activity, you can use the [Question Set or Quiz activity](https://h5p.org/question-set) instead.

If we look at the Pressbooks Dashboard and go to **H5P Content > All H5P Content**, we can see what this activity looks like on the back end. I find the activity, called “Yarn Weight,” then click Edit.

You can see where I filled out the activity’s title, the question, and provided various options. I marked the correct answer using a tick box. I also added a message to display when the correct answer is selected. If I wanted, I could add tips that would appear when I hovered over different answers. I could also enter different messages to display based on how well the learner did overall on the activity.

If I scroll further down, we can see all the behavioural settings I can toggle. I have enabled the “Retry” button and the “Show Solution” button, and I have randomized the order in which the answers appear.

If I go back to the top and click this arrow that says “Metadata,” I can see the information that appears when I hit the “Rights of use” button at the bottom of the embedded H5P activity. I’ve entered the title, the licence, the name of the author, and the year the activity was made. This makes it very easy for anyone who reuses this activity to provide proper attribution.

There are tons of other H5P content types out there. If you want to learn more about what you can do with H5P, I recommend [The H5P Pressbooks Kitchen](https://kitchen.opened.ca/), which is a website created by Clint Lalonde and Alan Levine to teach people about creating H5P activities for OER.

# LaTeX

Another useful tool to have in your Pressbooks toolbox is LaTeX. LaTeX is a math markup language that is used to create automatically formatted documents and mathematical and scientific expressions. If you want to create OER and you teach something like math, chemistry, physics, or finance, learning LaTeX could be beneficial.

## Without LaTeX

Here are a few equations written without LaTeX. Some were typed using only the keys on my keyboard, and some use special characters from the special character bank in the visual editor. The first equation — 5 times 7 equals 35 — is perfectly fine without LaTeX. The next equation, 4a minus 1 equals 15, is acceptable: the manually italicized “a” is not perfect looking, when you consider commercial math textbooks, but the meaning is clear.

The third equation — three-quarters plus one-eighth equals seven-eighths — looks clunky and is inaccessible. The three-quarters are represented by a special character, but the one-eighth and seven-eighths are not proper fractions, so a screen reader would not correctly interpret this equation.

The fourth equation — the integral — looks terrible!

## With LaTeX

Then we have those same four equations, written in LaTeX.

The first equation with the simple values and basic operation looks pretty much the same: it could take LaTeX or leave it.

The second, algebraic equation looks slightly better in LaTeX, and the “a” is formatted to look more like a math term automatically: no manual italicizing required.

The third equation with the fractions is a lot more consistent looking, and now the technical meaning of the equation is tied to its visual representation: they’re all real fractions.

The fourth equation with the integral looks miles better than it did before. LaTeX makes it easy to have a value in both the superscript and the subscript without putting one closer to the base value than the other. I’ve made the pi over 2 large, so that it’s easy to see what it says, but I could make it smaller, if I wanted.

*Show the back end*.

## More on LaTeX

These are only basic examples of how LaTeX can be used. LaTeX is a very powerful markup language that can nicely format virtually any mathematical expression. LaTeX can produce many special characters and output many different operators.

If you want to learn more about LaTeX, check out the [LaTeX Questions Answered](https://opentextbc.ca/pressbooks/part/latex/) section in the Pressbooks Guide by BCcampus. If you need any help with adding LaTeX to your OER, feel free to contact latexsupport@bccampus.ca.

# Internal Links

Another useful thing to know is how to create an internal link in Pressbooks.

When a link in an open textbook leads to a different website or OER, we call that an **external link**. An **internal link** is a link that goes from one section or chapter of a book to another within the same book.

To link from one chapter to another in the same book, follow these steps:

1. In the visual editor, select the text you want to link.
2. Select "Insert/edit link" on the visual editor toolbar (or use the shortcut Ctrl + K).
3. In the text box that appears, either type in the chapter or part title that you want to link to or paste its URL.
4. Select the desired chapter or part from the list that appears.
5. Hit the blue arrow that says “Apply”.
6. Click "Preview" and test your link.

## Anchors

An **anchor** is a link on a web page to a different part of that page, or a link from one web page to a specific part of another one.

I have created one anchor on this page that goes directly to the end of the chapter, which describes how to create an anchor. Let’s try following the steps:

1. In the visual editor, insert your cursor where you would like to place an anchor.
2. Select the "Anchor" banner on the visual editor toolbar.
3. Type in a descriptive identifier for your anchor. (For example, if you're creating an anchor beside instructions on how to make croissants, your anchor might be called "croissants".)
4. Select "OK". Save the page.
5. Select the text that you would like to link to the anchor.
6. Select "Insert/edit link" on the visual editor toolbar (or use the shortcut Ctrl + K).
7. Type the name of your anchor into the text box that appears.
8. Select your anchor from the list. It will look like "#anchor (Chapter Name)".
9. Hit the blue arrow that says "Apply".
10. Click "Preview" and test your anchor.

# Glossary Tool

The glossary tool is an excellent feature in Pressbooks for open textbooks. This tool allows you to create and insert glossary definitions throughout your book. You can also create an automatically generated list of alphabetized glossary terms in the back matter.

**Definition**: an alphabetical list of terms and their definitions in relation to a specific subject

To demonstrate, I’m going to create a glossary term and a glossary page, by following these steps:

1. In the visual editor, select the text to which you would like to add a glossary definition. I’d like to define “glossary”.
2. Select the "GL" glossary button on the visual editor toolbar.
3. Check that the term going into the glossary is correct. You may want to change the verb tense or change a noun from a plural to a singular.
4. Write a suitable description for the term.
5. Select "Insert". *Remember to point out the short codes and explain how they wrap around content*.
6. Select "Preview" and check that the definition is displaying the way you want it to.
7. From the Pressbooks Dashboard, under Organize, select "Add Back Matter".
8. On the right-hand side of the Add New Back Matter page, under "Back Matter Type", select "Glossary".
9. Give the glossary page a name, such as "Glossary" or "Key Terms".
10. Leave the content of the glossary page blank. This will ensure that the page automatically populates with the terms you insert into the book.
11. Select "Create".
12. Click the glossary's URL and view your glossary terms, listed in alphabetical order.

To edit glossary terms later, navigate to **Organize > Glossary Terms**, like so.

# Footnotes

Another possible addition for your OER is footnotes. Generally, footnotes contain additional information that appears at the end of a page in the web book and at the bottom of a page in export formats.

I want to add a footnote to my section on footnotes that links to the [Pressbooks User Guide section on footnotes](https://guide.pressbooks.com/chapter/add-footnotes-or-chapter-endnotes/).

**Footnote**: For more information about footnotes, see the [Pressbooks User Guide section on footnotes](https://guide.pressbooks.com/chapter/add-footnotes-or-chapter-endnotes/).

I can create a footnote by following these steps:

1. In the visual editor, place your cursor where you want to insert your footnote.
2. Select the “FN” footnote button on the visual editor toolbar.
3. A pop-up box will appear that asks you to “Enter footnote content here.” You can either:
   1. Type your footnote into the box, then select “OK”.
   2. Select “OK” without typing anything.
4. Short codes that look like “[ footnote ]information[ /footnote ]” will appear in your text. If you didn’t write out your footnote in the last step, do so now between the short codes. If you want to add any special formatting to your footnote, like boldface or italics, you can do this now (this is not possible in the footnote pop-up box).
5. Select “Preview” and check that your footnote is satisfactory.

When I hit “Preview”, I can see that my footnote automatically appears at the bottom of the page beneath a horizontal line. I can navigate to the footnote by clicking the number that appears next to the body text where the footnote was inserted. I can jump back to the text by clicking the arrow at the end of the footnote.

# Importing Content

Now that we’ve learned about some of the features for enhancing content in your book, let’s talk about some of the other aspects of the Pressbooks Dashboard.

If you would like to reuse existing open content in your OER, you may do so by importing it. Go to the **Pressbooks Dashboard > Tools > Import**.

In the Import Type drop-down menu, there are the different types of content you can import: EPUB, Word document, OpenOffice document, Pressbooks or WordPress XML, or a web page.

## Importing a Book in Pressbooks

When importing content from one Pressbook to another, there are several methods you may use. There is a [section in the Pressbooks Guide about how to import content](https://opentextbc.ca/pressbooks/chapter/pressbooks-import-options/) from Pressbooks that explains the differences between three methods.

When you **clone** a book, you copy an entire book to your own Pressbooks account. You may then edit, delete, or add any content that you like to your cloned copy.

You can also import content from a Pressbook using a Pressbooks XML file. You can download a **Pressbooks XML file** by going to the book’s home page (see [*Introductory Chemistry*](https://opentextbc.ca/introductorychemistry/)), clicking “Download this book”, and selecting the file type from the drop-down menu, if it’s available. In the B.C. Open Textbook Collection, a book’s list of editable files will also include the Pressbooks XML file, if one is available (see [*Introductory Chemistry* in the collection](https://open.bccampus.ca/browse-our-collection/find-open-textbooks/?uuid=c7025f6b-f32b-4d0a-865e-f473d9f98fb6&contributor=&keyword=&subject=)).

Using the Pressbooks XML method, you can either import the entire book or pick and choose which sections to include in your import. Unfortunately, this method will not successfully import any H5P activities that were embedded in the book that is being imported, so bear that in mind.

Finally, you can import a Pressbook using its **URL**. This method will import any H5P content in that book, and it allows you to select either the entire book or just pieces of it.

## Importing Other Content

You can also import content from books and resources not created in Pressbooks. However, the more complicated the source material is, the more cleanup may be required when importing.

For instance, a Word document that is imported into Pressbooks will be stripped of most of its special formatting in the web book. There is a section in the Pressbooks User Guide on how to [import from a Word document](https://guide.pressbooks.com/chapter/bring-your-content-into-pressbooks/#chapter-156-section-3).

# Users

Let’s switch gears and talk about users. Once you have a book on the go in Pressbooks, it’s possible that you will want to collaborate with others on it. We can add new users by going to the **Pressbooks Dashboard > Users**.

On this page, you can see all the people who have been added to your book and their roles. We can see that my account, ariannacheveldave, has Administrator access. Below is Harper’s account, which has Editor access. What’s the difference, exactly?

## Roles

To refresh, there are five levels of access in Pressbooks. In descending order of power, they are: Administrator, Editor, Author, Collaborator, and Subscriber. Pressbooks created a table called [User Roles in Pressbooks](https://guide.pressbooks.com/chapter/users/#usersandcollaborators1) in the Pressbooks User Guide, which can help us understand what powers each kind of user has. Every role in succession has slightly less power than the level above it. Note that every kind of user can comment, if comments are enabled in a book, as well as read public chapters.

If you want to give someone else total control over a book, you can make them an **Administrator**. An Administrator can manage users and settings; add, edit, publish, and delete chapters; and read private chapters. The user who creates a book is automatically an Administrator.

If you want someone to have control over all chapters in the book, but don’t want them to have control over the settings or users, make them an **Editor**.

If you want someone to add content to a book, but not to control what other people add, make them an **Author**. An Author can add, edit, publish, and delete chapters, but only their own: they have no control over anyone else’s chapters.

If you want someone to create content for a book, but don’t want them to be able to make chapters public at will, make them a **Collaborator**. A Collaborator can add and edit their own chapters, but they cannot publish them.

If you want someone to be able to look at content in your book, but don’t want them to add or publish any chapters, make them a **Subscriber**. You can enable the settings to allow Subscribers to view private chapters. This role is ideal for a peer reviewer.

## Add and Change Users

I want to add another user to my book. On the Users tab in the Pressbooks Dashboard, I click “Add New”. Then, I have the option to add a new user. I want to add my colleague, Josie Gray, to this book and make her an Author.

Josie already has a Pressbooks account, so I’m going to use the Add Existing User interface at the top of the page. I know her email (josie.gray@bccampus.ca), so I type it into the box. Then, I select the Role “Author” from the drop-down menu. Then, I click “Add Existing User”. Josie will then receive an email asking her to confirm that she wants to be part of this book.

I can also change User roles. If I decided that I wanted to make Harper an Administrator, I would go to the Users tab, select the check box by Harper’s name, then go to the drop-down menu that says “Change role to …” I would select the role Administrator from the drop-down, then click “Change”.

# Theme Options

So now that you have a book, you might want to adjust some aspects of the theme to better suit your needs. To do this, we’ll go to the **Pressbooks Dashboard > Appearance > Theme Options**.

There are several tabs on the theme options page: Global Options, Web Options, PDF Options, and eBook Options. I encourage you to look through these tabs and see what kinds of options are available to you. For now, I’m going to go through these tabs and point out the options that will be most relevant.

## Global Options

The first tab is Global Options. All settings on this page affect both the web version and the export versions of the book.

You can opt to display **Part and Chapter Numbers**. This puts a Roman numeral in front of each part name in the table of contents and an Arabic numeral in front of each chapter name. Numbering parts and chapters can make it easier for learners to differentiate between sections, especially when reading is assigned.

You can opt to create a **Two-level Table of Contents**. This option makes it so that Heading 1s display beneath a chapter title in the drop-down table of contents in the book. Let’s enable this and see what this looks like in the web book.

*Tick the box and save the page. Navigate to any page in the web book and open the table of contents. Look at the Advanced Pressbooks part.*

To the right of every chapter title is a plus sign. When I click the plus sign, a list of all the Heading 1s in the chapter appears. Enabling this option can make it easier for learners to find content that they’re looking for, as they’ll know in greater detail what each chapter is about.

*Back to Theme Options.*

On this page, you can also enable **Language & Script Support** for alphabets and languages other than English and the Latin alphabet. By default, Ancient Greek is supported in Pressbooks. If we scroll through this drop-down, we can see languages like Arabic, Chinese, Japanese, and Korean, as well as Musical Notation.

Finally, I will turn your attention to the **Text Box Colours** at the bottom of this page. You can change the colours of the Example, Exercise, Key Takeaways, and Learning Objective text boxes. You can edit the colour of the header text, the header background, and the body background.

## Web Options

Next is Web Options, which affect only the web book.

I can choose to **Display the Part Title** on each chapter. This can be helpful for navigation, as learners will be reminded exactly which part they’re in whenever they open a new chapter.

I can also choose to **Collapse Sections** headed by a Heading 1 within a chapter. I’m going to select this option and show you what it looks like.

*Enable the Collapse Sections option, Save Changes, then navigate to Internal Links chapter*.

Some learners will like this view for the way it divides the chapter’s content into its constituent parts so that the reader may navigate directly to what section they want to read.

## PDF Options

Next is PDF Options, which affect only PDF exports.

One important theme option to be aware of is the PDF **Page Size**. By default, the page size for a PDF is digest size, which is smaller than most documents that you would print. Digest makes the font size way bigger and creates far more pages. Always change the PDF page size to US Letter to reduce the number of pages.

**Paragraph Separation:** We also recommend skipping lines between paragraphs in the PDF, rather than indenting new paragraphs. This formatting looks better and is easier to read.

**Running Heads and Feet:** You can also customize what appears in headers and footers in the front matter, main body chapters, and back matter, such as author name, book title, chapter name, and part name.

The PDF of a book in Pressbooks can be somewhat finnicky, so it’s a good idea to export your book as a PDF frequently throughout the writing and editing process, just to make sure that everything is displaying as expected. I’m going to export and check my PDF now.

*Export digital PDF and scroll through to show what it looks like*.

## eBook Options

The final tab is eBook Options, which affect only eBook exports.

Like PDF, I will draw your attention to the **Paragraph Separation** option. We recommend skipping lines between paragraphs, rather than indenting new paragraphs.

# Book Info

Lastly, I’d like to turn your attention to the Book Information page in the Pressbooks Dashboard. This is where you fill out publication information for the book, such as title, subtitle, authors, editors, publisher, publication date, ISBN or DOI, language, cover image, subjects, copyright, and description.

We recommend that you fill out as much Book Information as is appropriate to help people cite the book, including author, publication date or year, title, and publisher.

Adding more metadata in this section also makes it easier for people using the [Pressbooks Directory](https://pressbooks.directory/) to find your book. For instance, if you add “biology” as a subject in the metadata of a book titled *The Life Cycle of the Caterpillar*, people searching for biology books in the Pressbooks Directory and other places are more likely to actually find it.

*Back to Book Info*.

Below Subjects is the Copyright section. This is where you can specify who holds the copyright of the book, such as the author or their institution, as well as the book’s licence, and the copyright notice that appears on the home page of the book under the heading “Metadata”. All BCcampus books use a copyright notice template, which can be found in the [Metadata and Book Info section in the BCcampus Open Education Publishing Style Guide](https://opentextbc.ca/publishingstyleguide/chapter/metadata-and-book-info/). You don’t have to follow this template, of course, but it’s available as inspiration to you. The copyright notice is a good place to put a sample citation, so that users have an idea of how to cite the book. This is also a good place to attribute the cover image.

*Back to Book Info.*

Under About the Book, you’ll find a Short Description and a Long Description. The Short Description appears on the home page of the book, right next to the cover image. The Long Description will appear farther down on the home page, under Book Information, and will also appear in search results of the Pressbooks Directory.

I haven’t yet filled out a Short Description, so I’ll do that now.

<em>Introduction to Crochet</em> does double duty as a beginner’s guide to crochet and an advanced user’s guide to Pressbooks. Inside, find information about yarn, hook size, and reading patterns, as well as LaTeX, H5P, and the glossary tool.

Note that the Short Description editor box is a text editor, meaning that you’ll have to use HTML to get any special formatting. Meanwhile, the Long Description editor box is a visual editor, much like a simpler version of the Pressbooks chapter visual editor. I can copy the same description into the Long Description box so that it appears in the Pressbooks Directory.

# Closing

That’s all I have for you today. Thank you so much for attending this Advanced Pressbooks webinar. The resources for this webinar will be posted on the event’s page on the BCcampus website. Check back there soon for links and a recording.

I hope you found this helpful! Please email me at [acheveldave@bccampus.ca](mailto:acheveldave@bccampus.ca) if you have any further questions about Pressbooks.