

**Transcript for OER Production Series: Introduction to Pressbooks (May 17, 2023)**  
**BCcampus session hosted on May 17, 2023**  
**Host: Kaitlyn Zheng**

KAITLYN ZHENG:

Hello again and welcome to Introduction to Pressbooks. This is the third webinar of our 2023 OER Production Webinar Series. My name is Kaitlyn Zheng. I am the coordinator of open textbook publishing at BCcampus, joining you today from the traditional ancestral lands of the Songhees Esquimalt Nations of the lək̓ʷəŋən (Lekwungen) Peoples, as well as the W̱SÁNEĆ Peoples which is also known as Victoria, B.C. In this webinar, I will introduce some of the basics of using Pressbooks to create and publish open educational resources. This webinar is designed for Pressbooks beginners, but we will be hosting an Advanced Pressbooks webinar next week on May 23rd at 10:00 to 11:00 am, where we'll go over more advanced features of Pressbooks. You can register for that at the BCcampus Event page, which is [bccampus.ca/events](https://bccampus.ca/events) And that is probably the same event page you used to register for this webinar. My colleagues will be monitoring the chat, so please feel free to put in questions to me there as we go along. There will also be time for questions at the end of the session. You can find a copy of these slides with speaker notes at a bitly link here, which is [bit.ly/pbwebinar1](https://bit.ly/pbwebinar1) Automatic captioning can also be enabled in Zoom during the session, and the slides and recording will be made available to you after the session shortly.

So here are the topics we will cover today. We will start with how to create a Pressbooks account, how to set up a book, and the Pressbooks dashboard. How to add content to a book through importing or Pressbooks editor. We'll briefly talk about math, in Pressbooks and H5P. And finally we'll talk about how to share your book.

So what is Pressbooks? Pressbooks as an open-source digital publishing tool commonly used for open textbooks. Once the textbook is created in Pressbooks, there's the option to export them to multiple formats to share with others for free. There is a webbook that can be accessed in the browser, as well as PDF files, ebook files, HTML, and Common Cartridge files that can be imported into learning management systems. BCcampus hosts an instance of Pressbooks that is free for all B.C. post-secondary faculty and staff to use.

So here's an example of an open textbook that is published in Pressbooks. *Introduction to Consumer Behaviour* by entry on Andrea Nioci. There was a book title, the author names, and a short description and Creative Commons licenses, which is CC BY-NC-SA 4.0 attribution Non-commercial ShareAlike in this case, There's the Read Book button that takes you to the first page of the book. In the big title at the very top, I can click and go back to the homepage. On the right side, we have a cover image and a "Download this Book" button that you can download different export formats from EPUB, PDFs, HTML Pressbooks XML, and Common Cartridge. Keep scrolling down to the table of content where you can click on the chapter titles and access that chapter directly. And also use this button to collapse or expand under the chapters on the parts or the book information in the metadata section.

So let's check out one of the chapters. This is the seventh chapter is Behavioural Learning Theories. At the top left corner, there is another table of contents. Then you can click and visit other chapters. We have some nicely formatted text, text boxes, headings, very similar to your regular textbooks on paper. While we have these glossary terms, I can click and expand these definitions. Further down, we have more glossary terms, images with captions text boxes. And the thing I really want to show you is this one, the H5P interactivity. So that's a pretty good example of what Pressbooks is capable of.

Now let's talk about how to create a Pressbooks account. To create a Pressbooks account, go to the Pressbooks homepage at [pressbooks.bccampus.ca](https://pressbooks.bccampus.ca). Any post-secondary faculty or staff in British Columbia or Yukon can create your own count on this platform with their institutional email. In the top-right corner, there's a button that says "Sign Up." But you can also use the "Create an Account" button here.

Fill out the registration form with a username or institutional email address, a password, and your institution. Here, I'm going to impersonate my coworker Ariana Cheldave for a bit. I'll fill in my username, BCcampus email, password, select my BC institution as BCcampus. At the very bottom, there's the option to register your book now or later. We recommend "Register my book now," even if you're not ready to start a book yet. It will be helpful to have one set up to use as a place to test out different things. There's no limit as to how many books you can have, so you can always create another book later if you want. If you choose to register a book now, you'll be taken to another registration form. Here you'll create a unique URL, for the book's webbook, provide a book title, select the language, and the privacy setting. Note that you cannot change the book's URL later, but you can always create a new book with a new URL. When a book is public, it appears in Google search results. And anyone with the URL will be able to access it. So you may want to select "No" for now as you're just getting started and it's a work in progress. You can change the settings at any time.

Now the new book is almost ready. But first, we'll have to look for an email from Pressbooks to activate the account.

Check your email inbox and sometimes the spam folder for the activation emails. And click the link to activate the account.

And the account is active and we can log in.

Enter your username or email address and password.

Once you log in, it'll take you to the dashboard of the book you just created. A book's dashboard is the admin interface for your book. This is where we can edit, customize, and manage everything about your book.

At the top of the page you'll see a button that says "My Books." Hover your mouse over; it will expand to "My Catalogue," "Create a New Book," "Clone a Book," and a list of books you own. Right now, this account only has access to one book, *Introduction to Crochet*. Click the book title, which will take you directly to that book's dashboard. In the middle of the screen you'll see an overview of the structure of the book. On the left is the dashboard from book info, to appearance, exports, plugins. We'll go over a few of these tabs later. but I encourage you to check these awesome H5P activities from our *Pressbooks Guide* that gives you more details of the dashboard. On the right is a list of users who have access to. Right now, there's only Arianna. Sometimes you might be working with multiple collaborators and you want to give them access to the book in Pressbooks. To do that, click the "Add" button in the user's tab. Click the "Users" from the dashboard menu Then "Add new users." So take you to the add new users page. You can add existing or new Pressbooks users and assign them a role. This chart was taken from the Pressbooks User Guide, which outlines the levels of permissions for each role.

Administrator has the highest levels of permission and is the only role that can manage users and settings. As the creator of the book, you are its administrator.

Users added to a book would appear in the list of contributors as well. A name has to be added in the contributors tab in order to be listed as the author, editor, or any contributor roles in the book info. Expand the book info tab in the dashboard menu and click on contributors, and fill in names.

In the book info tab, you can list them as the authors, editors, and translators, or reviewers. The Book info is where you can edit the book's metadata, such as title, subtitle, authors, editors, which you'll need to select from a list of contributors. There's also copyright information, licence descriptions, and cover image. customizing the appearance of the book.

The Themes page shows display styles. Theme options is where I can customize different display options in different formats. And Custom Styles is where you can view the full style sheets for the webbook, eBook, and PDFs. You can customize the style sheets if there's any specific style changes you want to make and you know CSS. The Plugins tab is where I can activate various plugins for a book. The two we want to highlight here are H5P, which is a tool that allows you to create interactive activities for your webbook and Hypothesis, which is a collaborative annotation tool.

For general editing purposes, there is also the search and replace tool. This allows you to search your entire book for exact matches of texts in HTML to replace that text. This is a tool to use with caution because there's no undo option.

We'll take a look at the webbook. Hover your mouse over the book title at the top and click "Visit site."

Here we can see the homepage *Introduction to Crochet*. It's fairly empty for now because we haven't really added anything.

Scrolling down is the table of contents and book info.

Let's check out Chapter 1. This is what a chapter looks like in the administrator's view. The admin view has an edit button (pointed by arrow 1) that takes you to the Pressbooks editor to edit this chapter. And the admin button at the top (pointed by arrow 2) that takes you back to the Pressbooks dashboard of this book.

Now let's talk about how to add content to your Pressbooks. If you have written your work in Microsoft Word or Google Doc, or let's say you would like to reuse open content from elsewhere, or adapt from another open textbook, you can import these contents to Pressbooks instead of doing a manual copy and paste.

If you want to use a book in Pressbooks in its entirety, you can clone a book. By cloning we create a copy of a book at a different URL that has the exact same content as the original. Something to note that the book you want to clone must be public and under an open licence. The Clone a Book page is pretty straightforward. Just fill in source book URL, a new URL for your new book and the optional new title. Leave it blank if you want the title to remain the same.

Import is a good option if you only need certain parts of a source book. Under Tools, go to "Import" and select an import type from EPUB files, Word files, OpenOffice, Pressbooks or WordPress, PB/WP XML, Pressbooks webbooks, or websites. Upload the file or provide a source URL. Here we're importing a Pressbooks webbook using its URL. Once the input process is completed, you will be able to select which parts and chapters you want to include in your book. If you're importing a Word document, heading 1 in the Word document will be recognized as the chapter. So be sure to apply heading styles to the desired chapter titles or the entire Word document will be imported into one chapter. Also check out "Import Content into Pressbooks" in *The Pressbooks Guide* for more detailed information on inputting different types of files.

If you're writing in Pressbooks or you want to edit the content you just imported, you'll need to use the Pressbooks editor. Let's start

with the Organize page. In Pressbooks, contents are organized into front matter, parts, and chapters, where multiple chapters can be organized under one part and back matter.

To add a new part, or chapter, front matter, back matter, select any one of these add buttons highlighted in blue box because Pressbooks loves for you to have different options to add content. In the Add New Part view, you can add part title and content, as well as change the order of the parts in your book. Here with this part "Getting Started" and left its contents blank. We also decided to make it a second part of the book. Now that we have saved this page, Pressbooks has generated a permanent link for this part using its part title. This is the URL for this part in the webbook.

Let's go back to the Organize page. The new part appears as the second part in this book. But you don't always have to indicate the part order if you're just adding a new part following the existing parts. Now let's add a chapter to this part by clicking the "Add Chapter" button directly underneath the new part.

This is the chapter view. The interface looks very similar to a part, except for right-side panel, where a box titled "Part" that tells you which part the chapter is in. And you can move the chapter to a different part by selecting from one of the options in the drop-down menu. In this case, we've named this chapter "Tools and Materials" and left it in the part title "Getting Started." Once we hit "Create," this chapter would appear under the part "Getting Started" in the Organize page.

When you hover your mouse over a part or a chapter title, a number of options will appear. Edit will take you back to the editor's view. "Trash" will delete the chapter. You can recover the chapter from trash within 24 hours if you delete it by accident, "View" will take you to webbook view of the chapter and "Move Up" or "Move Down" can change the order of the chapters in part.

Let's go back to the edit view and we'll go over some of the buttons and features in more detail. First, there's the "Edit Previous" and "Edit Next," which allows you to move between editing different chapters. Then there's the "Add Media" button, that you can use to insert media files like images, videos, PDF files or Word files, PowerPoint slides and Excel sheets. The H5P button that's for inserting H5P activities. And most importantly the editor tool with different formatting options.

Here is the enlarged toolbar. If you're familiar with WordPress, this will look pretty familiar to you as well. Most of them are quite intuitive. We'll highlight a few buttons that differ from your standard options. On the second row, the Omega symbol, highlighted in green, is a special character button, which allows you to insert different types of symbols from special punctuations to math and Greek letters. The question mark highlighted in red is the keyboard shortcuts help. In the third row, the buttons from left to right are: Insert a table, Apply in HTML class. Insert an anchor tag, which you can use to create same page links, superscripts, subscripts, code brackets, insert footnotes, convert Microsoft footnotes, insert LaTeX, which is a markup language for math equations. And finally, Insert gloss terms.

When creating a textbook, headings are important to give a structure to the textbook and make it accessible. In Pressbooks, text is automatically in paragraph style. Headings create a structure in which they logically follow each other based on their level. In Pressbooks headings are numbered 1 to 6, with heading level 1 coming first in the hierarchy and heading level 6 coming last. It's important to make sure that you don't skip any heading levels because people who are visually impaired and use screen readers to navigate the web rely on the logical structure. Skipping heading levels— for instance, having a heading 1 followed by heading 3 with no

heading 2 in between will be quite confusing. With this in mind, we want to first insert a heading 1 into this chapter by highlighting the text and fill our heading 1 from the drop-down menu.

Here we made "Yarn" heading 1. You can also put your mouse where you want a heading, select the heading style first and then type in the heading. This is what each level headings look like in the Clarke theme. Each heading was automatically applied to a different style, but you can customize the styles through CSS.

Now back to the tools and materials chapter. We have made "Yarn" and "Books" heading 1. "Size" heading 2. Now what if we want to insert links into the chapter?

This is the web page that we would like to link to. When linking to something, it's good practice to write descriptive link text so that people using screen readers will know exactly where the link will take them to, instead of hearing the long URL or simple "click here," which is just as confusing. In our case, the chart depicted on the page is titled "Standard Yarn Weight System." The page is all on the website of the Craft Yarn Council, but that's less important than the chart itself. When linking to this page, we will write "Standard Yarn Weight System" as that is the most pertinent information and gives enough context for those clicking the link.

Here we will highlight the text that we would like to link to a web page. Then, we can either click the Link button in the toolbar on the first row here, or we can use the keyboard shortcut Control or Command plus letter K. This brings up a box to put the URL and hit enter.

And this is what the linked text looks like. Looking at the webbook, the linked text is red and underlined by default. If we click on the linked text, we will be taken to the website in the same tab. Links opening in a new tab or window unexpectedly can be disorienting to people using screen readers. Best practice is to always have links open in the same tab, unless you have a good reason to have them open a new tab or a new window. If you do have a link that opens in a new tab, you should signify this in the link text by writing the name of the web page, followed by a new tab in square brackets. Now what if we wanted to link to a file? If we want to link to a PDF file, and if you have the link to the PDF file, we could simply link to it like you're linking to an external site. Or we can upload PDF files to the Media Library. For this chapter, we would like to include a PDF titled "Complex Images for All Learners."

We could do a simple drag and drop, or we can click the "Add Media" button.

There are two tabs: Upload Files and Media Library. This is the Upload Files tab, where we can select files from our computer or do a drag and drop here.

Once we've added a file, we can see it in the Media Library. It falls, we can see it in the Media Library. And remember the descriptive link text practice, we can give a descriptive title to the PDF here, then the file type in square brackets. So that a reader can decide if they want to open

this type of file at the time and if their devices have the software to open the file type described, whether it's PDF, Word file, PowerPoint, or Excel sheets. At the right bottom, highlighted in the green box is the link to the file in the Pressbooks Media Library if you need to link to it like linking to a website again. Now hit "Insert into Chapter." The PDF is inserted with its title, which is a descriptive link text. You'll be able to edit the link at any time just like you're editing a regular external link. I'm sorry if I missed that question earlier because I didn't quite catch what you're saying. But you can put your questions in the chat or ask it again at the end of the Q&A session.

When we save, this is what it looks like in the webbook, very similar to an external link.

Another important aspect to textbooks is images. Inserting images is very similar to adding a file. Put your cursor where you want the image to be, click the "Add Media" button or do a drag and drop.

Here we're back at the Media Library with more attachment details to fill than a PDF.

Here are all the different fields I can fill out regarding the image's information. On the left, we have alt text, which is a text description of the image for anyone who can't see it. This is very important for accessibility. The title of the image, which can be used to generate image attributions. The caption is text you want to appear in your book along with your image. The description box, which is usually left blank. This is for adding notes to make searching through the Media Library easier or just for your own personal notes. And the file URL, is a link that will take you directly to the image file. On the right, we have image attribution information and attachment display settings. This information can be used to generate image attribution statements if you turn on to media attribution functions, theme options, global options. Though in our experience, we prefer to type in the attribution statements as we often encounter images with complex attributions, and the media attribution tool sometimes misbehaves during Import.

Once everything is filled out, click the "Insert into Chapter" button.

We've inserted this image at its fullest size, which is best practice, so that readers can view the image at its fullest size when they right-click and select "Open Image in New Tab." We don't need this image to be this large in the book, so let's scale it down a little bit. To edit an inserted image, click it, then click the pencil icon that says "Edit."

This is the Image Details dialogue where we can edit the inserted image's alternative text, caption, and display settings, including alignment in size. Note that once you insert an image, the attribution information can only be edited from the Media Library. In this case, we've set the image to align in the centre and chosen the custom size. This is where we can set exactly how many pixels wide and tall the image will be. Now let's take a look.

This is the scaled-down image in the chapter. Now what if we wanted to add a video in one of the chapters. Adding videos in Pressbooks is actually very simple. Let's use this YouTube video about how to read a basic crochet pattern as an example. Simply copy the video's URL, no special embed code required.

Then go to the visual editor of the chapter and paste the link you just copied.

Give it a few seconds and the video would embed itself. I promise you this is not magic or some kind of trick because we're using screenshots. Pressbooks has a plugin built in to embed YouTube videos from the URL so there is no special HTML or embed code required from you.

Going to the webbook, the video will show up in the chapter with a play button.

Now let's insert a table. First, we click the Table button in the third row of the editor toolbar.

This will produce a drop-down menu. Hover over "Table" and drag the cursor over the grid to highlight the number of cells you want your table to have. The table I'm about to create here will have four columns and three rows. We can always delete or add rows and columns later, but this will be our initial size for now.

And here's a blank table.

Fill the table with data, and let's talk about table accessibility for a bit. The screen reader navigates the table by reading out column and row headers, then there are cells' content, from left to right, top to bottom.

You make your table accessible. Start with setting up your header cells. Select the cells by dragging your cursor until they're all highlighted.

Next, click the Table button in the toolbar, select cells, then Table cell properties.

This will produce a pop-up box that allows us to set the specifications for cells, including height and width, cell type, and scope of the cell. To make a header cell, set the cell type to header cell, and scope as columns since these are headers for the column. This will link the information in each header cell to the cells in the column.

You can see that Pressbooks has automatically bolded the text in those header cells to make them stand out visually. Here we have row headers as well.

Select the row headers and go through the same process. Set the scope to row.



The row headers are bolded just like the column headers. We can also add a caption to the table. Put the cursor somewhere in the table and click the Table button again. Then go to Table properties.

Simply check the box beside Caption in this tab. You can also edit the width, height, and alignment of a table. We recommend setting the table width in percentage instead of pixels, so the table can adapt to different screen sizes in different export formats.

We now see a blank box that has appeared above the table, where we can add the table caption. Once we've filled it out, click Save. And this is what a sample table looks like in the webbook.

Another useful element in Pressbooks is the text box. Pressbooks offers a variety of educational textbox templates, including examples, exercises, and key takeaways.

Here is the list of standard text-box templates available in Pressbooks in the Clark theme. They do look slightly differently in different themes. You can edit the title and text editor and customize their styles in the appearance tab.

When creating a textbook in certain subject areas, you may need to write math equations at some point. Pressbooks has a number of features that allows you to create beautifully formatted equations. If you're just doing simple one-line equations or formulas, the special character tab in the Pressbooks text editor might have the math symbols you need. Unlike using a dash for subtraction or letter x for multiplications, These symbols will be read properly by screen readers.

Option two is to use an external equation editor to create images of equations and then upload those images into Pressbooks. However, you have to provide alternative text descriptions for all images of equations so they are accessible to students using screen readers. In addition, you need to pay attention to the quality of the images and ensure they're all displaying properly in all formats, especially the PDFs.

The best option for creating complex, accessible equations is to write equations in Pressbooks-supported math markup language. Pressbooks has MathJax installed, which will probably render math equations that are written in LaTeX, AsciiMath and MathML in all formats.

Here's an example of LaTeX, one of the most commonly used math markup language in BCcampus projects. The top image shown here is what you see in the Pressbooks editor. And the bottom image shows what those equations look like in the webbook. These are very simple examples, but LaTeX is also capable of displaying vert complex multi-line equations. If you're interested in learning more about LaTeX, see *LaTeX Questions Answered* in the *Pressbooks Guide*.

Another popular feature in open textbooks is the H5P activities, which are great for formative learning assessment. We will be delving into this topic more in-depth in our Advanced Pressbooks webinar, but we'll show a few more examples here.

This is an example in Math for Trades, volume 1 where we have multiple interactive multiple choice questions.

Another great example is the Physical Geology H5P Edition, which has over 200 H5P activities, from drag and drop, hotspot, course presentations, flashcards and interactive videos. To find out more information and support for H5P in Pressbooks, you can visit the H5P kitchen or [h5p.org](http://h5p.org), which provides many helpful resources for those who would like to get started with H5P.

After you've finished writing your book, you can export them to different formats for offline uses or for others to adapt your book. Simply go to the export page from the left side panel and select a format you'd like to export your book to. Note that if you make any changes to the book after you've exported it, you'll have to re-export your book for the changes to show up in the exported formats.

Once the export is done, the newly exported files will be available to download. It's a good idea to review your exported files before sharing because sometimes things don't display as you'd expect. Under the Export tab, there's also a cover generator if you need.

The Publish tab is where you can post links to where people can buy copies of your book. If you have print-on-demand options available.

Once you're ready to share your book, go to the Settings tab. Under Sharing and Privacy, make sure that your book's visibility is set to public, not private. And to make sure that your export files will be available for you to download. Go to "Share Latest Export Files," and check "Yes, I would like the latest export to be available to everyone."

And this is the homepage of *Introduction to Crochet*. Now, after everything we've done in this webinar, if you're interested to see more Pressbooks features or some general crochet tips, visit this page at [pressbooks.bccampus.ca/webinar](http://pressbooks.bccampus.ca/webinar) And that's all we want to share for today's webinar.

There are some other Pressbooks support resources available. BCcampus has the Pressbooks video tutorial channel at [media.bccampus.ca/channels](http://media.bccampus.ca/channels). *The Pressbooks Guide* at [opentextbc.ca/pressbooks](http://opentextbc.ca/pressbooks), and the Accessibility Toolkit at [opentextbc.ca/accessibility](http://opentextbc.ca/accessibility), which provides more information about how to make your Pressbooks content accessible.

And finally, I would like to mention that this webinar is part of our 2023 OER Production Webinar Series. We have another one on Advanced Pressbooks coming next week on May

23rd, and a final one, UDL and Open Educational Resources happening on May 31st. You can register for the remaining webinars at [bccampus.ca/events](https://bccampus.ca/events) And that's really the end of today's webinar. Thank you all for coming. A reminder that you can download the slides here in the Word document with all the resources we've shared today at this bitly link. [bit.ly/pbwebinar1](https://bit.ly/pbwebinar1) and that recording will be available to you after this webinar shortly. Thank you all for coming, and this is the time for questions. If you have any questions, feel free to type in the chat or unmute. I think I missed one earlier, so I'm sorry about that and yeah, you can ask it now if you'd like.

HARPER:

Thank you, Kaitlyn. Candy had a question in the chat. They said, Can I share a book privately for feedback from external collaborators, edit the book, and then share publicly once the book is finalized? And then an additional one. Do I still have the ability to edit the book after it is shared?

KAITLYN:

That is yes and yes, you can share it. But practically for feedback from collaborators, if you can set up the Pressbooks account with them. But they'll probably need a BC institutional email most of the time. And you can edit a book any time, even after the book is shared you can edit the book Even after you export it and share with the public, you can still go in and edit it at any time. But just be mindful to update your users about the updates to your book. So at BCcampus we usually keep a versioning history at the very back of the book in the back matter that keeps track of the changes to the book after we published it. And I hope that answered your questions. Thank you for coming.

FACILITATOR:

There's one other question in the chat, asking, Is it best to author in Pressbooks or can you import a Word document that has [...]?

KAITLYN:

Sorry, could you repeat that question? I'm trying to find it in the chat.

FACILITATOR:

Is it best to author in Pressbooks or can you import a Word document that has proper headings?

KAITLYN:

Yes, you can totally import a Word document with proper headings. So heading 1 in a Word document will be recognized as a chapter in Pressbooks. But there are other, other styles in Word that might get lost in Pressbooks as Pressbooks is somewhat limited in terms of formatting compared to Word. But you could totally do the import. Thank you. Okay. If we don't have any other questions, then thank you all for coming. And I wish you all a nice rest of your day. Thank you.