

UC Berkeley Pressbooks Guidelines

UC Berkeley Pressbooks Guidelines

OFFICE OF SCHOLARLY
COMMUNICATION SERVICES, UC
BERKELEY

UC Berkeley Library
Berkeley



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About this Guide

This guide is a one-stop shop for everything you need to know about creating and publishing a book with Pressbooks on the UC Berkeley Open Book Publishing Platform. The guide is maintained by the Library's [Office of Scholarly Communication Services](#) and is subject to ongoing updates and revisions.

We have organized our guidance into the following parts:

PART I. USER POLICIES AND GUIDELINES

This section summarizes the essential policies and guidelines that we expect users to follow when they create books with Pressbooks on the UC Berkeley Open Book Publishing Platform.

PART II. MAKING YOUR BOOK

This section provides an overview of how to accomplish key tasks to get your account up and running and dive into your book project. For more comprehensive

guidance, consult the general [Pressbooks user guide](#) and the [PressbooksEDU \(campus version\) guide](#).

PART III. PUBLISHING AND PROMOTING YOUR BOOK

This section provides an overview of what to consider when you are planning to publish your book, from the technical process of exporting files to strategies for exposure and discoverability.

APPENDIX

This Appendix provides information about additional resources for those working on open textbooks, including examples of other books for inspiration and adaptation, and Library guidance on copyright, publishing, and other topics.

More Information

Questions or feedback? Email schol-comm@berkeley.edu.

PART I

**USER POLICIES
AND
GUIDELINES**

CHAPTER 1

Policies and Guidelines at a Glance

When you create a Pressbooks account on the UC Berkeley Open Book Publishing Platform, you agree to our [terms of service](#). The UC Berkeley Library makes this platform available to you at no cost. In order to ensure the platform's stability, sustainability, and success, we expect that all users adhere to the basic set of guidelines outlined below.

These guidelines are subject to change. [Email the Library's Office of Scholarly Communication Services](#) if you have questions.

1. All users must agree to our **terms of service**. [Read the terms of service](#).
2. All users must have an **active UC Berkeley affiliation**. [Read more about accounts](#).
3. All users agree to upload and publish content **owned only by them**, or third-party content

that they have **permission or a license to reuse** or that falls under **fair use**. [Read more about copyright](#).

4. Users are permitted to **choose any license** for their work. [Read more about licensing](#).
5. The **selection of featured works** on the site is made at the Library's discretion. In order for a book to be featured on the site and be eligible for publishing-related services, it should be **openly licensed, allow for derivative works**, and be **intended for use in the classroom**. The Library retains discretion to feature works that are not openly licensed. [Read more about featured works](#).
6. We expect users to **stay within reasonable storage limits** for uploaded content. [Read more about storage](#).
7. We encourage users to **maximize the accessibility** of their published works. [Read more about accessibility](#).
8. The Library will make certain publishing-related [services](#) available for books that will be used in Berkeley courses, including:
 - Assignment of an **ISBN**
 - Creation of a **MARC record**
 - Listing and/or indexing on the [campus site](#)
9. The Library is *not* able to provide the following

publishing-related [services](#):

- **Editorial and production work**, such as proofreading, copy editing, and formatting
 - **Web-related services**, such as web development and website administration
 - Listing the book in the [Directory of Open Access Books \(DOAB\)](#)
10. Users are responsible for **managing their own Pressbooks accounts**. Users who leave Berkeley and wish to retain access to their accounts should make appropriate plans for transferring account ownership and files as necessary (read more about [adding book collaborators](#) and [migrating files](#)).

CHAPTER 2

Terms of Service

When you create an account on the UC Berkeley Open Book Publishing Platform, you agree to the Pressbooks [terms of service](#) and our guidelines for users, which are outlined in the sections that follow.

CHAPTER 3

Accounts

Anyone with a @berkeley.edu address can create a Pressbooks account. You can also choose to grant access to your book to another user with an active Berkeley affiliation.

At this time, only users with @berkeley.edu email addresses are able to create accounts and access the system. If you are working on a project with a coauthor at a different institution, you can give authorship credit to your collaborator but only you will be able to access the project in the system. If you need to give a non-UCB collaborator access to the system, email schol-comm@berkeley.edu to discuss possible options.

Your account will be active for as long as you remain affiliated with Berkeley. If you leave Berkeley, you can export and download your book files to transfer to a different platform ([read more about moving files](#)).

CHAPTER 4

Your Privacy and Intellectual Property

As part of UC Berkeley's license with Pressbooks, Pressbooks is obligated to protect authorized users' non-public information (authorized users are UC Berkeley affiliates with active @berkeley.edu email accounts). This means that Pressbooks will not share any of your personally identifiable information associated with your account with any third parties, except subject to court order.

Further, you retain all your intellectual property rights that [you have as a UC Berkeley author](#), including your right to make fair uses of other works.

Copyright

As you acknowledged in the [Terms of Service](#) you accepted in creating a Pressbooks account, you should make sure that any content that you upload and publish with Pressbooks is used lawfully and with appropriate permissions. This means that the content should meet one of the following criteria:

- Content is owned by you
- Content is owned by a third-party but used with permission or a [license to reuse](#)
- Content is in the [public domain](#)
- Content falls under [fair use](#)

If you have questions about copyright in publishing, we have a [guide](#) for that.

If you are searching for openly-licensed materials that you can incorporate into your book—particularly for a book you’re creating for classroom use—we suggest consulting the following resources:

- [OpenStax](#)
- [Open Textbook Library](#)
- [OAPEN](#)
- [GitBooks](#) [account creation required]

Note that when you create your own book, you will typically hold copyright as an author of your work. (Your [affiliation with UC Berkeley](#) determines your rights.) If you do hold copyright, you can choose how you want to allow others to use your creation. We talk about this more in the [Apply a License](#) section.

CHAPTER 6

Featured Books

The UC Berkeley Open Books [catalog](#) features campus works of broad interest to the Berkeley community. The selection of featured works on the site is made at the Library's discretion.

In order for a book to be featured on the site and be eligible for publishing-related services, it should be openly licensed, allow for derivative works, and be intended for use in the classroom. The Library retains discretion to feature works that do not meet these criteria. Authors whose works are selected will be notified prior to the work being added to the catalog.

Use [this form](#) to nominate a book to be featured in the catalog or to request removal of a featured book

At present, only books created with Pressbooks can be featured in the catalog. The Office of Scholarly Communication Services is developing a platform-agnostic catalog to feature all UC Berkeley open books, irrespective of the publishing tools with which they were created. If you published or know of a noteworthy open book created on a platform other than

Pressbooks, please submit [this form](#) for the work to be considered for inclusion in the future catalog.

CHAPTER 7

Storage Capacity

In order to ensure that the Pressbooks publishing platform is accessible to all users on campus, we expect you to stay within reasonable limits with regard to file size when uploading files. As a general rule, please limit your media uploads to 5 MB per item.

Accessibility

Pressbooks features and outputs are designed to support accessibility. Pressbooks is committed to making its code and user interface comply with [WCAG 2.0](#) (level AA) standards, and it is developing additional tools to help authors maximize the accessibility of published work.

Use this short checklist to make sure your book is optimized for accessibility. This guidance is based on the [excellent accessibility resources created by the University of British Columbia](#).

- Use headings to structure text
- Write meaningful hyperlinks (not “click here”)
- Include alt-text for all uploaded images
- Include transcripts for uploaded media
- Use a readable font size
- Use high-contrast colors

Learn More

Read more about [accessibility features in Pressbooks](#).

CHAPTER 9

Publishing Services

Pressbooks is intended to be a self-service publishing platform. The Library's Office of Scholarly Communication Services administers the site but does not provide direct support or assistance for publishing projects, including such services as proofreading, copyediting, or website development.

The Library does provide some support and guidance for publishing-related integrations and registrations. See the [Publish Your Book](#) section for more information.

PART II

MAKING YOUR BOOK

Process at a Glance

The book creation and publishing process in Pressbooks consists of five major tasks. Depending on the type of book you are creating and the level of involvement you wish to have, the process may include a number of smaller details as well.

Once you have created an account, you will move through the following steps:

1. [Add a new book](#)
2. [Add content to the book](#)
3. [Select a theme](#)
4. [Apply a license](#)
5. [Publish](#) and [export](#)

See the sections that follow for more detailed guidance and instructions.

Create an Account

1. Click the [Sign Up](#) link in the top navigation menu.
2. Enter a username (you won't be able to change this).
3. Enter your @berkeley.edu email address.
4. Enter a password.
5. You will be prompted to either register (start creating) your book immediately or choose to do so later. Select the "register now" option if you are ready to start working on a book right away. On the next screen, you will enter your book details. Choose the later option if you are not yet ready to start working on your book.
6. Regardless of whether you register your book now or later, you will need to check your email for a link to activate your account.
7. Activate your account and then sign in again.

Start a New Book

There are a few different ways to start a new book project.

1. **When you sign up for a new account:**
Choose the option “Register my book now” on the account creation screen. On the next screen, you will be prompted to enter more details about your book.
2. **From the UC Berkeley Open Books homepage:** Once you have created an account, you can start a new book project at any time by clicking “Create” on the site homepage.
3. **From the Dashboard:** Hover over “My Catalog” in the upper left-hand corner of the window, and choose “Add a New Book.”

Tips

- It's a good idea to make your book private while you're still setting it up. You can turn on the privacy setting on the screen where you first create your book. You can also turn privacy on and off from the Dashboard in the **Text > Organize** section.
- Your book will have a unique URL ("webbook address"). This cannot be changed, so choose it wisely. You can change the actual book title at any time and as many times as you wish.

Add Content

COPY-PASTE METHOD

We recommend that you first prepare your book using word processing software and then transfer the contents to Pressbooks. Copy-pasting text is the most straightforward and reliable way to import content into your book. Always double-check the formatting after you paste so that you can catch any styling inconsistencies.

MICROSOFT WORD IMPORT

Alternatively, you can experiment with importing content via an uploaded Word file (**Tools > Import > Microsoft Word**). This requires that you go chapter-by-chapter and that you prepare each file with structured styling, i.e., by applying headers. Consequently, this

approach can be labor-intensive and prone to technical difficulties.

Learn More

Read about [how to prepare a Word file for import](#).

OTHER METHODS

- **Import EPUB files:** If you previously created a book with another publishing platform, you can import the EPUB files into Pressbooks (**Tools > Import > EPUB**). Create the new book first, and then start the import.
- **Clone another Pressbooks book:** If you created a book on the Pressbooks.com site (as opposed to the UC Berkeley Pressbooks site), or if you find another Pressbooks book that you wish to adapt, you can clone the files as long as the book is publicly available and licensed under a Creative Commons license that allows derivatives.

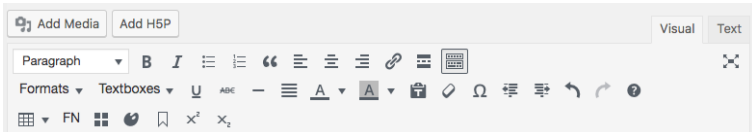
Learn More

Read about [cloning](#).

CHAPTER 14

Text Formatting

Use the formatting toolbar to make adjustments to the text in your editing pane. Many of the formatting options are similar to those found in word processing software. Click the toolbar toggle button (first row, top right) to reveal the full set of formatting tools.



The editing window has two different tabs where you can enter your content:

- **Visual:** A WYSIWYG (“what you see is what you get”) window that displays formatting changes as entered and in real time. This is the primary and best option for most users.
- **Text:** An HTML-based editor that uses markup language. If you are familiar with HTML, you can use this tab for troubleshooting or customizations. We do not recommend

extensive use of this option because heavy customizations could have downstream effects on book themes and on export formats.

Learn More

See the [full list of formatting options](#) along with their descriptions.

Ready to preview and publish your book? [Read on.](#)

Images and Graphics

Use the **Add Media** button in your editing window to upload images as well as audio or video files. Uploaded files will be stored in a media library so that if you are using an item more than once, you do not need to upload it multiple times.

Image adjustments (cropping, shading, etc.) should be made prior to uploading. It is possible to make basic size adjustments within Pressbooks, but the tool is not meant to provide a full suite of graphics editing functions.

Any uploaded media should be:

- Optimized for accessibility ([read more](#))
- Either owned by you, used with permission, or uploaded under the guise of fair use ([read more](#))

Learn More

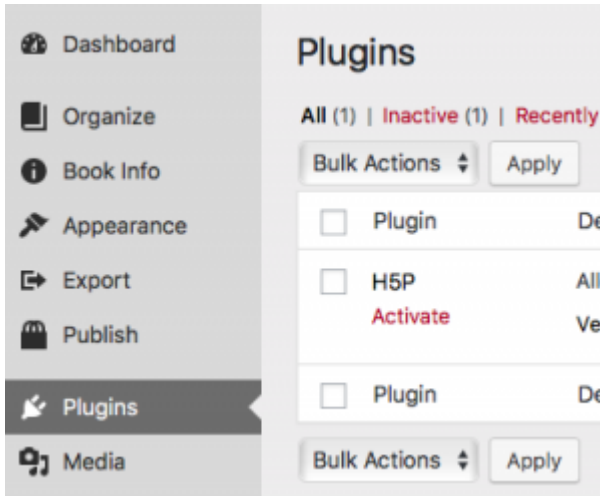
Read more about [uploading media](#).

Quizzes and Interactive Elements

Add interactive elements like quizzes or games to your book using the H5P plugin. You can see these types of elements in action in this [University of Wisconsin Portuguese textbook](#).

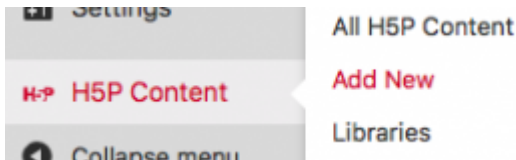
To use H5P in a book, first activate the plugin:

1. Go to **Dashboard > Plugins**
2. Click the **Activate** link under H5P

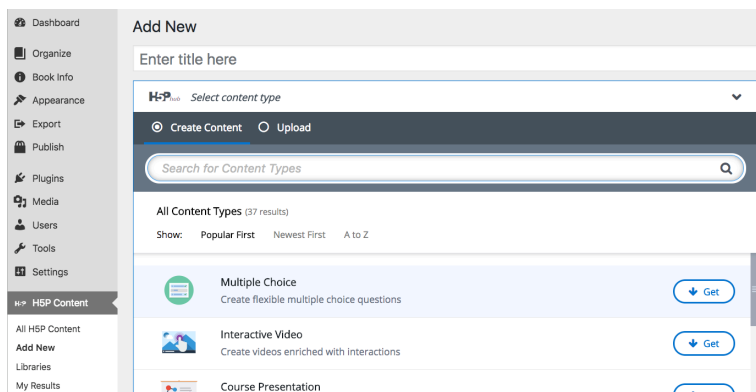


Then open the H5P menu:

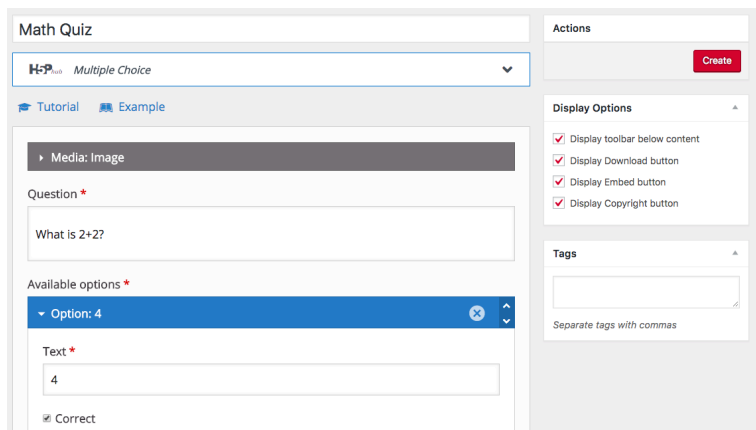
1. Go to **Dashboard > H5P Content**
2. Click **Add New**



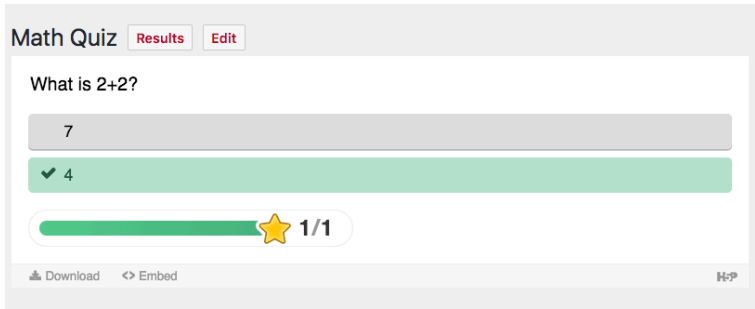
Choose one of the H5P options from the dropdown menu. The first time you select an option, click the **Get** button. If you have previously used one of the options, the button will say **Details**.



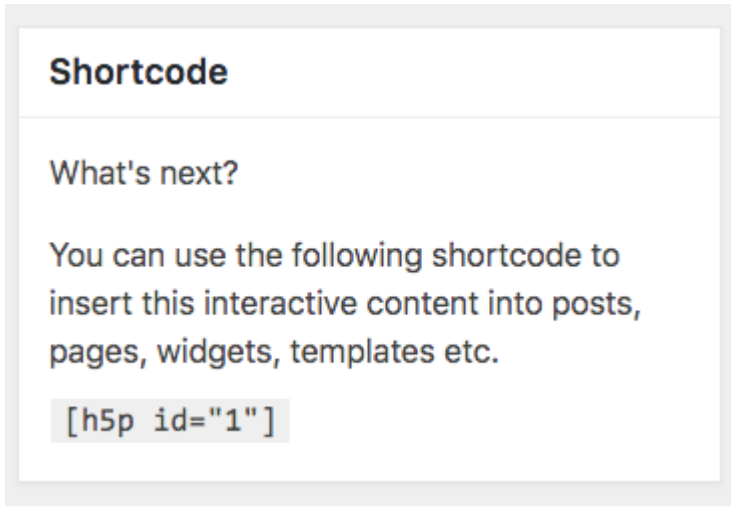
Once you select an option, fill out the required fields and then click the **Create** button in the upper right-hand corner of your window.



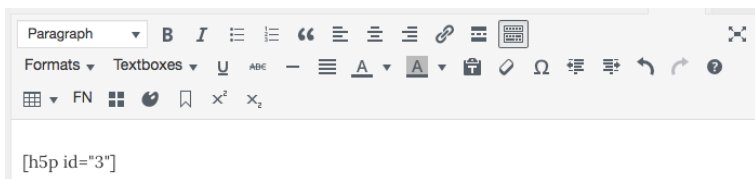
You will see a preview of the component you just created. You can also test the component to make sure it works.



In the upper right-hand corner of your window, copy the shortcode.



Open your text editor and paste in the copied shortcode.



Save your work and preview the page. The H5P component is now live.

Learn More

Read more about [working with H5P](#).

Note that there are a couple of drawbacks to using interactive elements. H5P is not (currently) integrated with bCourses, so if you intend to use the plugin for diagnostic purposes, you will need to record and track student performance separately.

If you are planning to make your book available in non-web-based format, the plugin content cannot be exported so you will need to insert placeholder text marking the non-exported content.

CHAPTER 17

Book and Cover Design

THEMES

Pressbooks provides a set of professional ready-made theme designs to customize the look and feel of your book. You can switch to a different theme at any time and as many times as you wish. To select a theme, go to **Appearance > Themes** in your Dashboard. You can preview a theme before activating it.

[Learn More](#)

Read more about [themes](#).

BOOK COVER

To upload a cover for your book, open the Book Info section of your Dashboard and scroll down to the Cover

Image section. Upload your cover image and scroll back to the top of the page to click Save. Note that the thumbnail preview of your cover image may not load the first time.

The cover image should conform to the following specifications:

- **Dimensions:** 2500px x 3750px
- **Maximum size:** 2 MB
- **File format:** JPEG or PNG
- **Aspect ratio:** 1:1.5

Your cover image will be used only on the web and ebook formats of the book. Covers for PDFs intended for print-on-demand purposes need to be prepared separately.

Learn More

Read more about [working with book covers](#).

Add a Collaborator or Coauthor

You can choose to add a collaborator to your book and customize the role and permissions for each added user. Collaborator accounts are restricted to users with @berkeley.edu email addresses. If you need to give a non-UCB collaborator access to the system, email schol-comm@berkeley.edu to discuss possible options.

Learn More

Read more about [adding collaborators](#).

CHAPTER 19

LaTeX

LaTeX is supported in Pressbooks. When you are working in the text editor, select the “Visual” tab and insert LaTeX inside brackets, like this:

```
[latex](type your formula here)[/latex]
```

Learn More

Read more about [LaTeX in Pressbooks](#).

PART III

PUBLISHING AND PROMOTING YOUR BOOK

Publish Your Book

When is your book considered published? Whenever you decide!

You can make your book publicly available online and make it available for export at any point. It's easy to make changes and updates, so you can "publish" as many times as you need to.

We encourage you to share your book freely under an open license (discussed in the next chapter). However, you may wish to offer your book for sale through an online bookseller such as Amazon Marketplace, or another ebook platform. It's your responsibility to ensure you have the rights necessary to enter into a commercial agreement with a vendor.

There are some factors that should be considered if you are hoping to feature your book in the UC Berkeley Library catalog or make it more widely available. The following table presents an overview (in no particular order) of these considerations and the circumstances in which they might be relevant to your needs and goals.

Step	Library Service?	Purpose	Guidance
Proofreading and copyediting	No	Finalize text for publication	
Add subject areas	No	Facilitate discoverability if book is featured in the catalog	Add terms in Pressbooks in Book Info > Subjects
Get set up to sell your book online	No	Provide students and/or other readers with an option to purchase a hard copy via print on demand services	Pressbooks recommends IngramSpark or Amazon's CreateSpace .
Get an ISBN (International Standard Book Number)	Maybe	Unique identifier for published books, used for distribution in libraries and bookstores	Request via email to schol-comm@berkeley.edu
Create a MARC record	Maybe	Enable book to be discoverable in the UC Berkeley Library catalog	Request via email to schol-comm@berkeley.edu
Deposit the work in eScholarship	No	Exposure beyond campus.	Download PDF from Pressbooks and upload to eScholarship (read more).
Get an ARK identifier	Automatic	Get a persistent URL for the eScholarship version of the book (if applicable)	Deposit in eScholarship (see above)
List the work in the Open Textbook Library	Yes	Exposure beyond campus. Encourage other textbook authors to adopt or adapt your work.	Four requisite criteria for listing (Notably: Must be Creative Commons licensed and allow derivatives). Request via email to schol-comm@berkeley.edu .
List the work in the Directory of Open Access Books (DOAB)	No	Exposure beyond campus. Support scholarly credibility.	Book must be peer reviewed and your department will need to qualify as a publisher .

Register work with the Library of Congress	No	Exposure beyond campus. Online, searchable public record of your work. Necessary to pursue litigation for any infringement.	Copyright Office charges \$35 for single-author registration (see form).
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Apply a License

As you prepare to publish your book, you should consider how to manage your copyrights, and what rights you want to keep or grant to others. The way you can grant rights to others is by applying a license. (We explain licenses more fully in our [Understanding Licenses](#) guide.) Before you apply a license to your work, be sure to [confirm](#) first that you hold copyright in your book, since your affiliation with UC Berkeley determines what you own.

Pressbooks allows you to select any (or no) license at a page, chapter, or book level. You will be able to choose from the full suite of [Creative Commons licenses](#), which allow copyright owners to retain copyright but grant certain rights to copy, distribute, etc., depending on the copyright owner's preferences. Creative Commons licenses also specify that anyone who uses your work must attribute you as the owner. Check out the Creative Commons [Choose Your License Tool](#) for help selecting a license.

As you're choosing whether to apply a license, you

should keep in mind a number of benefits from selecting a Creative Commons License:

- **Increased citation and impact:** Choosing Creative Commons licenses that promote re-use of your work by others mean that your book is likely to get wider readership and accrue greater citations. Readers feel more comfortable reading and citing works that clearly allow them to make various uses.
- **Increased discoverability:** Choosing a Creative Commons license that allows the creation of derivative works is the only way to get your book listed in the Open Textbook Library, which can greatly enhance how easy your book is to find.

CHAPTER 22

Export

Pressbooks offers a number of options for exporting your work in online formats depending on how you want to make it available to others to read.

Summary of the available export options:

Format	Purpose	Notes
PDF (print)	Optimized for print-on-demand.	Export will not include a cover image. Does not support transparent images or internal links.
PDF (online)	Optimized for all PDF uses besides print-on-demand.	Export will not include a cover image.
EPUB	For eBook readers.	Compatible with all eBook readers except Kindle (see below)/
MOBI	For eBook readers.	Compatible with Kindle readers.

Learn More

Read more about [exports](#).

Get Noticed

With an openly licensed book in Pressbooks, you have a number of options for getting exposure and attracting readers. Read more in the [Publish Your Book](#) section.

- **On campus**

- Submit your work to be featured in our [catalog](#)
- Deposit a PDF in [eScholarship](#), the University of California open access repository
- Teach it in your courses
- Share it with your [subject liaison librarian](#)

- **Beyond campus**

- Add a link to your web book on your departmental or personal website, social network profile, or CV

- List your book in the [Open Textbook Library](#)
- Get listed in the [Directory of Open Access Books](#) (Note: Your book will need to be peer reviewed, and your department will need to [qualify as a publisher](#))

Tip

Citing open textbooks

We recommend citing open textbooks as follows (format adapted from the University of Hawaii at Manoa):

Structure: [author last name, author first name]. (Year of publication). [Book title]. [Institution where published]. Retrieved from [URL].

Example: Potter, Harry. (2018). Encyclopedia of Wizardry. Hogwarts. Retrieved from berkeley.pressbooks.pub/encyclopediaofwizardry.

Deposit in eScholarship

We encourage you to deposit your open books in [eScholarship](#), the UC system's repository for open scholarship. Monographs (books) are not covered under the terms of the University of California's [Open Access Policy](#), but adding your Pressbooks works to eScholarship is a great way to get more exposure for your publishing projects, and to preserve a copy of them in perpetuity.

To deposit your work, export it from Pressbooks as a PDF and then upload the PDF to eScholarship. If you make further revisions to your book, remember to export a new version and replace the file in eScholarship.

Learn More

Read more about [depositing work in eScholarship](#).

Updates and Revisions

Pressbooks makes it easy to update and revise books on an immediate and ongoing basis. You can implement and publish new changes instantaneously. If you have made your book available as a PDF or in another file format, make sure to run new exports of the latest version as these files will not update automatically.

Learn More

Read more about [exports](#).

If you obtained a MARC record or ISBN for your book and are revising the work, you may need to release the updated version as a new edition. [Email us](#) for more guidance.

CHAPTER 26

Delete or Unpublish a Book

You have several different options for deleting or unpublishing a book, depending on how and where you have made your book available as well as on your desired outcome(s).

Option	Description	How-To
Delete book	Remove book entirely	From your Dashboard, hover over the book title in the top navigation bar until a menu appears, then click Delete .
Make book private	Restrict visibility of book to be completely private only to you and any viewers designated by you	From your Dashboard, go to Text > Organize and change visibility to Private .
Un-feature	Remove a featured book from the catalog	Email schol-comm@berkeley.edu or submit this form .

Move a Book to a Different Platform

If you want to move your book to a different platform, you are free to export the files to migrate or use elsewhere. For maximum portability, we recommend that you download the EPUB files along with any other formats that you anticipate needing in the future.

Learn More

Read more about [exports](#).

EXAMPLE TEXTBOOKS CREATED WITH PRESSBOOKS

- [Environmental Biology](#)
- [Antología abierta de la literatura hispana](#)
- [Português para principiantes](#)
- [Beginning Excel](#)
- [Introduction to Psychology](#)
- [Canadian History: Post-Confederation](#)
- [Media Studies 101](#)
- [Concise Introduction to Logic](#)
- [Greek and Latin Roots: Part 1 – Latin](#)
- [Perspectives: An Open Invitation to Cultural Anthropology](#)
- [eCampus Ontario site](#)

GENERAL RESOURCES ON CREATING OPEN TEXTBOOKS

- [Authoring Open Textbooks](#)
- [A Guide to Making Open Textbooks with Students](#)

- [Modifying an Open Textbook: What You Need to Know](#)
- [Faculty OER Toolkit](#)

UC BERKELEY SCHOLARLY COMMUNICATION RESOURCES

- [Search for open textbooks in the UC Berkeley Library catalog](#)
- [Understanding licenses](#)
- [Copyright and digital projects guide](#)
- [Guide to open access images](#)