Self-Publishing Guide

Self-Publishing Guide

A reference for writing and self-publishing an open textbook

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About BCcampus Open Education

Welcome to the *Self-Publishing Guide.* The BCcampus Writing Guidelines for Articles and Web Content and the attached style sheet [Word file] were referenced during the initial copy editing and proofreading phases of this guide.

This guide is an **ongoing resource** to which information will be updated as needed. Each chapter includes a "Page added | Last update" textbox near the bottom of the page.

BCcampus Open Education began in 2012 as the B.C. Open Textbook Project with the goal of making post-secondary education in British Columbia more accessible by reducing students' costs through the use of open textbooks and other OER. BCcampus supports the post-secondary institutions of British Columbia as they adapt and evolve their teaching and learning practices to enable powerful learning opportunities for the students of B.C. BCcampus Open Education is funded by the British Columbia Ministry of Post-Secondary Education and Future Skills, and the Hewlett Foundation.

Open educational resources (OER) are defined as teaching, learning, and research resources that, through permissions granted by the copyright holder, allow others to use, distribute, keep, or make changes to them. Our support resources are openly licensed using a Creative Commons licence, and are offered in various e-book formats free of charge, or as printed books that are available at cost.

For more information about open education in British Columbia, please visit the BCcampus Open Education website.

Acknowledgements

I'd like to thank my colleagues — Amanda Coolidge, Josie Gray, Lucas Wright, and Rajiv Jhangiani — for their thoughtful feedback and support, and Rosario Passos for first suggesting I share our team's *lessons learned* with the open education community.

An extra thank you to Josie Gray for her copy editing skills and insights. Josie, your exceptional talents have made this guide that much better.

Introduction

When BCcampus Open Education began, its Authoring Guide was created to assist faculty and staff in this province with not only writing open textbooks, but also adapting and adopting them. Basic information about open education and its resources were included as everyone began learning about this new way of teaching and learning. To our surprise and pleasure, others adapted this guide to fit their institution's or region's needs.

Much has happened since then. An increasing number of faculty and staff are writing open textbooks, creating a growing demand for a resource that will guide authors through not just the textbook-writing process, but also the many steps needed to carry a textbook — an *openly licensed* textbook with its own unique requirements — to completion. Some authors are fortunate to have the backing of an academic press or open textbook publisher. For authors who do not have this support, this *Self-Publishing Guide* is for you.

Using our *Authoring Guide* as a framework, all of the internal processes used and experiences gathered by BCcampus Open Education project managers during the first phases of the B.C. Open Textbook Project have been included in this volume. Sections about the adaptation and adoption of open textbooks and how to use Pressbooks have been removed and added to separate guides.

I have done my best, when writing this guide, to model what we preach by following the best practices outlined in it. Some of the extra steps taken with this guide include:

Accessibility

- Following the accessibility criteria laid out in the BCcampus Checklist for Accessibility Toolkit
- Marking links to Word documents as "[Word file]"
- Labelling external links — that open in a new tab — with "[New Tab]"

Attention to detail

- Performing both copy editing and proofreading
- Creating and posting a comprehensive style sheet

Extra features

- Highlighting key points or links to additional information in shaded textboxes

- Identifying keywords with bold text
- Summarizing key terms, alphabetically, in a [Glossary](#)

Open

- Providing templates as editable Word files
- Curating only open resources

References

- Using attribution statements for all curated open resources: CC-licensed and public domain
- Citing text throughout using the Chicago citation style
- Posting all references in an end-of-book bibliography

Topics covered in this *Self-Publishing Guide*

This guide was arranged into sections that take the open textbook author through the following steps of the writing and publishing process. At the end of each section, look for links to related chapters in the Open Textbook Network's publication: [Authoring Open Textbooks](#).

1. Look Before You Write

In this first section, would-be authors are presented with the challenges of writing and publishing a textbook and the unique characteristics of a book that is openly licensed.

2. Prepare to Write

This part lays out issues that should be considered and addressed before starting an open-textbook-publishing project.

3. Plan Your Book

This list of topics will help you create a comprehensive plan for your textbook project.

4. Write… and More

This section discusses the many facets of the open textbook writing and creation process.

5. Edit and Review

The hallmarks of a quality textbook — peer review, copy editing, and proofreading — are covered in this part.

6. Pre-publication

These are the final tasks to complete before publication, including setting up a communication plan.

7. Post-publication

Once your textbook has been launched, look to these suggestions to help track usage and maintain a high-quality textbook.

Other open textbook guides and toolkits

BCcampus Open Education has developed several instructional guides that are designed to complement this *Self-Publishing Guide*.

- *Pressbooks Guide*: This guide specifically addresses the creation and adaptation of open textbooks and other OER using the Pressbooks platform. It is intended to act as an adjunct to the comprehensive Pressbooks Userguide.
- Accessibility Toolkit – 2nd Edition. This toolkit provides the resources and best practices needed to create an open and accessible textbook. The first edition is also available in French: La Trousse d'outils d'accessibilité.
- Adaptation Guide. This resource outlines the steps required to adapt or revise an open textbook.
- Print-on-Demand Guide. This guide outlines the what, why, and how of producing printed copies of textbooks.
- Adoption Guide – 2nd Edition. This references offers pointers for instructors who want to use or adopt an open textbook in the classroom.
- Working Group Guide. This resource is for librarians, staff, and faculty who support or are supporting open education at their institution and are starting or running an open working group.

I

Look Before You Write

Section Topics
This section includes: • [Not Just Another Textbook](#)   • [Experience](#)   • [Why Should I Give My Work Away?](#)   • [Copyright and Open Licences](#)   • [Fair Dealing and Fair Use](#)   • [Concerns About Plagiarism](#)   • [Quality](#)

1.

Not Just Another Textbook

So, you've decided to write and self-publish a textbook. And not just any textbook — an open textbook. Before you begin, it's important to understand the differences between an open textbook and a standard textbook, and how these contrasting characteristics might affect the open textbook author and publishing process.

Open vs. closed

Open textbooks are open educational resources or instructional resources created and shared or published in ways that allow more people to access them. They reside in the **public domain** — where copy rights have been waived by the copyright holder or copyright has expired — or have been released by the copyright holder under an **open-copyright licence**; both of these circumstances permits free use and repurposing by others. This prototype is different from how copyrighted materials are typically managed. (See [Copyright and Open Licences](.).)

The traditional textbook-publishing model assumes that the author owns copyright for the textbook and that these rights are not shared with others. In other words, all rights are reserved so the textbook is essentially closed. If the author owns copyright, they can sell to a publisher the right to print and distribute their work. The conditions of this sale are typically outlined in a contract between the author and publisher, a document that should be reviewed by a lawyer familiar with copyright law.

On its [Copyright Guidance: Copyright for Authors & Creators page](.), the Yale University Library offers advice to writers who are thinking about using a publisher. They say:

> Most authors of books or journal articles are required to sign an agreement with their publisher as a condition before publication. It is important to read these agreements as they are legally binding and may have an impact on how the author can use or reuse the work. Like any agreement, the publisher agreement *should* be negotiable so that the author retains some or all of the copyrights associated with the work.[1]

However, the distinction between publishing open textbooks, as an individual or with an open-publication press, and the more traditional textbook publishers, is beginning to blur. In a January 29, 2018 blog, David Wiley ponders:

> (t)he open education community's willingness or unwillingness to be more inclusive, welcoming, and supportive of newcomers – even those from private enterprise – will largely predict its ability to grow and have the kind of dramatic impact we all want it to have. Can you imagine a day when many of the most important contributions to many of the most important OER and open textbook projects are made by people who work for for-profit publishers and other companies, and who contribute to OER as part of their formal job

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1. Yale University Library, "Copyright Guidance: Copyright for Authors & Creators" last modified June 21, 2017, https://guides.library.yale.edu/copyright-guidance/CopyrightForAuthors (accessed February 15, 2018).

responsibilities? Can you imagine a day when many of the world's most-used OER were originally published by companies, who continue to invest in their ongoing updates and maintenance? Can you imagine a day when companies are releasing millions of new words, images, videos, and interactives under open licenses each year?[2]

Too many choices

Textbooks are often built in an online **platform** (software system or website) where content can easily be changed (intentionally and not) and many features can be added. Some argue that an online textbook should take full advantage of media beyond the text in a book. This alone can be stressful as one grapples with how to proceed in this sea of endless choices.

Building an open textbook adds even more alternatives to both the creator and those who are permitted to use and change the final product. The author is faced with millions of photos, illustrations, and other open educational resources from which to select and add to the textbook. Others, who want to customize the completed book — and are basically given free rein to do so — must decide what to change or add, a situation that is both exhilarating and exhausting. Trouble making decisions in an environment that presents too many options is not uncommon; in fact, it is a well-recognized cognitive process referred to as **overchoice** or **choice overload**.[3]

Choice overload during open textbook work can be stressful

As a future author and publisher, you'll want to contemplate how these factors might impact your work and approach to producing an open textbook. For instance, consider how the concept of and responsibilities for writing a textbook are different than they were before open textbooks appeared. You might think about how:

1. Open textbook authors are members of the sharing community where knowledge is freely and openly distributed so that others can build upon it. The open textbook becomes community property rather than the chattel of a single owner.

2. An open textbook author must accept that their work will be used and changed — often without their knowledge — actions over which they have no control.

3. Open textbook authors should be willing to share editable files of their textbook in order to allow others to make changes and/or add to it in the form of an **adaptation**.

2. Wiley, David, Weblog entry on "Reflections on 20 Years of Open Content: Lessons from Open Source," *iterating toward openness*, posted January 29, 2018, https://opencontent.org/blog/archives/5354 (accessed February 15, 2018).

3. "Overchoice," *Wikipedia*, last modified December 3, 2017, https://en.wikipedia.org/wiki/Overchoice (accessed February 15, 2018).

4. As the author of an open textbook, one should remain open minded and unafraid to receive and respond to feedback. In turn, the author can use input to begin conversations that will hopefully lead to knowledge sharing and building.

5. A self-publishing author should seriously consider maintaining their completed open textbook by updating content when necessary and correcting mistakes. These steps are necessary for the ongoing quality and sustainability of their book and OER in general.

The community also has responsibilities. As a member of this group, let academic integrity be your beacon and open principles your creed.

1. Give credit where credit is due. Copying a colleague's openly licensed work is not considered plagiarism; however, one should be diligent about providing an accurate, complete, and well-laid-out **attribution statement** for each borrowed open resource. In other words, fulfill the legal terms of the open-copyright licence by giving the original author credit for their work. (See Concerns About Plagiarism.)

2. Deliver all criticism to an open textbook author in a constructive and professional manner.

3. Build on the existing work in the open educational commons. Like the open textbook author, be confident when sharing your ideas about these resources with others.

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*For more information, see the Authoring Open Textbooks chapter on **Defining Open Textbooks**.*

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2.

Experience

How does your experience match the requisites of open textbook writing and publishing?

For many, writing and self-publishing an open textbook is unfamiliar terrain. However, identifying pertinent skills from past and current professions will help you gauge *how* your expertise fits with this new endeavour and *where* you need to draw on the knowledge of others to fill in the gaps. Publishing an open textbook is not a one-person job, so use the information you generate from this chapter as the springboard from which to build your team.

Publishing experience

As you consider which of your talents might transfer to producing and publishing an open textbook, write down related positions you've held. These might include:

- Editor
- Graphic designer
- Instructional designer
- Librarian
- Marketer

- Project manager

- Publicist

- Researcher

- Writer

Next, by each role, describe the details of that job. Then fill out the below table by matching your skills with the knowledge needed to produce an open textbook. The skills gaps can be filled by others. (See Identify Support.)

Identify the Gaps

Area	Open-Textbook-Publishing Skills	My Experience	Relevancy / Strength	Support Required (Y/N)	Potential Candidates
Book Production	book design				
	graphic design				
	layout				
	project management				
	research				
	technology: authoring platform				
Writing / Editing	copy editing				
	proofreading				
	writing				
OER	open-copyright licences				
	copyright / public domain				
	OER research				
	OER evaluation				
	OER production				
	open textbook writing				
	attribution statements				

Writing experience

Previous writing experience comes in handy for both you and your contributors. Seasoned textbook authors know that this kind of project can take one to three years to complete when all stages are factored in: consultation, planning, researching, writing, and publication. The writing portion alone can range

from six to eighteen months, depending on the length and complexity of the book. Knowing this upfront and understanding the determination and specific skills required to complete the task helps set the stage for successful authoring.

If you haven't authored a textbook before, create a list of other writing assignments you've completed or contributed to. These might be:

- Textbook(s) in your field or another
- Book(s), fiction or non-fiction, in an unrelated field or subject
- Chapter(s) for a textbook or other book
- Course content; course packets; supplemental material for a course
- Article(s) published in a professional journal
- Article(s) published in a magazine related to your discipline
- Reviews about books in your field
- Letters to the editor for a professional journal in your field
- Professional blog about subjects in your field

Qualifications as a writer — in any capacity — prepares you in other ways too. As a writer, you will know what to look for when selecting colleagues as contributing authors. (See Contributing Authors.) Although writing is not synonymous with book production, many authors are acquainted with at least some aspects of publishing. This know-how, however minor, can be very handy when planning an open textbook project. (See Textbook Outline.)

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3.

Why Should I Give My Work Away?

A while back, during a presentation I was making at a faculty workshop, an instructor sitting at the back of the room looked unconvinced as I described the advantages of using open textbooks in the classroom. When the discussion turned to open licences and how they worked, she raised her hand and asked, "Why should I give my work away?" I had heard this question before and thought it was a legitimate concern. However, that instructor's blunt query made me think about my own writing experiences and my decade of work with other authors before I joined BCcampus. I remembered a time — before the Internet and open-copyright licences — when a writer's livelihood depended on the sale of their articles and books.

Yes, I understood an author's hesitancy about giving their work and the rights to their work away for free. However, things had changed. The sharing and collaboration of material and permissions between educational writers and teachers have and are leading to many good things, though it can feel like a sacrifice to the individual author.

I concluded that individuals asking the question — Why should I give my work away? — have two concerns: one, they worry that by giving away their work they won't make any money. And two, allowing others to make changes to their text book means losing control over the content. Let's take a look at the financial concern first.

I'll lose money

I wrote two books and was certain that my hard work on each would pay off with a big cheque. Like many book authors, even those who sign a contract with a big publisher, I didn't see any royalties after my initial advance. But maybe self-published books are different, I thought.

Not so, according to a 2013 survey conducted by Dana Beth Weinberg where she analyzed responses from almost 5,000 authors who took the 2013 Digital Book World and Writer's Digest Author Survey. She found that nearly one-fifth of self-published authors earned no income from their writing and for those that did, the

Does giving work away really lead to lost income?

annual median income was less than $5,000. Even authors who worked with a publisher only made between $5,000 and $10,000 per year.[1]

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1. D.B. Weinberg, "The Self-Publishing Debate: A Social Scientist Separates Fact from Fiction (Part 3 of 3)," *Digital Book World*, December 4, 2013, http://www.digitalbookworld.com/2013/self-publishing-debate-part3/ (accessed August 16, 2017).

So you're probably not going to miss out on riches by giving your work away. And for those searching for financial backing to write and publish an open textbook, there are various funding sources available. (See [Who Pays for This](#).)

Now for concern number two: won't letting others make changes to your textbook undo your hard work, steal your control, and lead to chaos?

I'll lose control over content

In his chapter, "You Can't Sell Free, and Other OER Problems," in *Open: The Philosophy and Practices that are Revolutionizing Education and Science*[2], Robert Biswas-Diener discusses the concern many authors, and potential authors, have with their "control over content" if released into the **Commons**. He says:

> Most peoples' concerns regarding losing control of their intellectual property or reputation are understandable in spirit but do not play out in fact. A large part of the openness in OER is related to removing obstacles to sharing information.

Are you losing control or sharing your knowledge?

What's in it for me?

If you're not going to get rich and you're giving up control, what reason is there to write an open textbook? During the faculty workshop I describe above, I didn't try to defend the benefits of writing an open textbook. Instead, I asked the audience why — and if — they thought this was a worthwhile venture. This is what they said.

1. Your work will be more widely read.

2. There is a movement underway in which it is believed that work that is funded or supported by public funds should/must be openly shared and covered by an open licence.

3. If authors release their original work or revisions made to someone else's work openly, the risk of repeating existing knowledge is decreased. Instead, sharing one's work promotes building on existing work and collaboration.

4. Some people see this as a social justice issue in which knowledge and education need to be

2. Robert Biswas-Diener, "You Can't Sell Free, and Other OER Problems," in *Open: The Philosophy and Practices that are Revolutionizing Education and Science*, ed., Rajiv S. Jhangiani and Robert Biswas-Diener (London: Ubiquity Press Ltd., 2017), 261. https://doi.org/10.5334/bbc.u.

available to everyone, in particular members of marginalized groups who face systematic barriers.

5. Having access to open textbooks and OER helps authors who wish to customize, or **adapt**, an existing work for their course, institution, region, or country. (See [Reasons to Adapt an Open Textbook](#) from the BCcampus Open Education *Adaptation Guide*.)

There is no doubt that writing a textbook requires commitment, time, and fortitude. Yet, there are certainly benefits for the author.

1. Authoring a textbook is a form of scholarship that can influence your field and contribute to your credibility.[3]

2. Writing a textbook can lead to more professional opportunities. At the University of British Columbia, e.g., their [Guide to Reappointment, Promotion and Tenure Procedures at UBC 2016-17 [PDF – New Tab]](#) states that "Contributions to the practice and theory of teaching and learning literature, including publications in peer-reviewed and professional journals, conference publications, book chapters, textbooks and **open education repositories / resources**."

3. Sharing one's work as an open textbook will contribute to the knowledge-sharing community and, hopefully, lead to new ideas from others who then share these out.

> **Show Your Work**
>
> On November 3, 2015, Sarah Hinchliff Pearson from Creative Commons introduced Austin Kleon in her blog "Anatomy of a book: Part 1 – inspiration".[4] She talked about Kleon's book *Show Your Work* and how it "is built around 10 fundamental principles for creators." Kleon says he shows "…how to deal with the ups and downs of putting yourself and your work out in the world…" and proclaims "…it's time to stop worrying and start sharing."

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1. *Does giving work away really lead to lost income?*: [Money](#) by [Eric L.](#) is used under a [CC BY-NC-SA Licence](#).

2. *Are you losing control or sharing your knowledge?*: [Cardboard](#) (cropped and border added) has been designated to the [public domain (CC0)](#).

3. "Why do universities support faculty writing textbooks?" *Academia*, April 16, 2013, https://academia.stackexchange.com/questions/9372/why-do-universities-support-faculty-writing-textbooks, (accessed August 16, 2017).

4. Sarah Hinchliff Pearson, "Anatomy of a book: Part 1 - inspiration," *Made with Creative Commons,* November 3, 2015, https://medium.com/made-with-creative-commons/anatomy-of-a-book-56c46eabb9e1 (accessed August 15, 2017).

4.

Copyright and Open Licences

Before you begin writing, make sure you have a firm grasp of what copyright means and how applying an open-copyright licence — typically a [Creative Commons licence](#) — or designating your copyright to the public domain will affect your textbook.

According to the Merriam-Webster dictionary, **copyright** is

> the exclusive, legal right to reproduce, publish, sell, or distribute the matter and form of something (such as a literary, musical, or artistic work)[1]

Copyright logo

The laws that govern copyright vary from country to country. The term "copyright" (copy + right) was first recorded between 1725 and 1735.[2]

The copyright owner of a work, such as a textbook, is permitted to sell or distribute their work as they deem fit. This includes by assigning a licence or offering permissions to another party. For example, if an author decides to sell a book to a publisher, the contract might state that while the author retains copyright, the publisher has the right to print and sell the first copies of the book globally. In other words, the publisher has "First-time, non-exclusive, worldwide rights," and for this right, the publisher pays the author. After the publisher has exercised this right, the author may resell their work.

Exceptions to copyright ownership: employment

Section 13(3) of Canada's *Copyright Act*[3] explains that one's employer owns copyright. Jean-Sébastien Dupont and Guillaume Lavoie Ste-Marie, from the law firm Smart & Biggar, Fetherstonhaugh, describe it this way: "if the work is created in the course of employment under a contract of service, and absent

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1. "copyright," *Merriam-Webster,* https://www.merriam-webster.com/dictionary/copyright (accessed August 1, 2017).

2. "copyright," *Dictionary.com,* http://www.dictionary.com/browse/copyright, (accessed August 1, 2017).

3. Canada, "13: Ownership of Copyright," *Copyright Act*, http://laws-lois.justice.gc.ca/eng/acts/C-42/page-4.html#h-7 (accessed December 13, 2017).

any agreement to the contrary, *the employer will be the owner of the copyright* (emphasis added) in the work created by the employee without the need for a formal assignment."[4]

What can and can't be copyrighted

There are several things that can't be copyrighted. In the U.S., they include the following:

1. Titles, names, slogans, and short phrases. (However, some of these might be protected with a trademark.)
2. Facts, ideas, concepts, systems, and methods of operation. (Yet, copyright might protect how these items are expressed such as in a writing or illustration.)[5]

For more information on this topic, see the Creative Commons blog by Timothy Vollmer, "The public domain and 5 things *not* covered by copyright".

In Canada, copyright provides protection for "literary, artistic, dramatic or musical works (including computer programs) and other subject-matter known as performer's performances, sound recordings and communication signals."[6]

Note: The terms *copyright* and *intellectual property* are not synonymous. As stated above, copyright are permissions that apply to specific creative works whereas **intellectual property** is a broad term that refers to

(a) form of creative effort that can be protected through a trademark, patent, copyright, industrial design or integrated circuit topography.[7]

Intellectual property rights are the permissions that cover these creative efforts, of which *copyright* is one.

Works within the **public domain** are not restricted by copyright, so they are owned by the *public*. However, copyright laws vary from country to country. For a detailed discussion on the public domain in Canada, see UBC's Copyright-Free Materials; or: Why Should I Learn About the

4. Jean-Sébastien Dupont and Guillaume Lavoie Ste-Marie, "Do you actually own the IP generated by your Canadian employees?" *Smart & Biggar - Fetherstonhaugh,* June 16, 2014, http://www.smart-biggar.ca/en/articles_detail.cfm?news_id=866 (accessed December 13, 2017).
5. "What Does Copyright Protect?" *Copyright.gov,* https://www.copyright.gov/help/faq/faq-protect.html (accessed November 16, 2017).
6. "A guide to copyright," *Government of Canada,* https://www.ic.gc.ca/eic/site/cipointernet-internetopic.nsf/eng/h_wr02281.html (accessed November 16, 2017).
7. "Glossary of Intellectual Property Terms," *Government of Canada,* https://www.ic.gc.ca/eic/site/cipointernet-internetopic.nsf/eng/wr00837.html#i (accessed November 16, 2017).

[Public Domain?](#).

Open-copyright licences

*Creative Commons
licence logo*

Creative Commons (CC) licences are **open-copyright licences**. (Also referred to as **copyright licences**.) Unlike more restrictive licences or permissions, these set of licences grant the following permissions and conditions. They give:

- the non-exclusive right
- to anyone
- anywhere on the globe
- to retain, reuse, redistribute, remix, or revise
- the author's copyrighted work
- as many times as they like
- with no expiration date on these permissions.

The only condition to these permissions is that the user must **attribute** — give credit to — the copyright holder or the creator of the work. This is the minimal requirement of the most basic Creative Commons Attribution (also called CC BY) licence. Other versions of this open-copyright licence may include additional conditions. (See [Appendix 1: Licences and Tools](#).)

The 5Rs of Openness

In his 2007 blog, David Wiley described the "Four Rs of Open Content"[8].

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8. David Wiley, Weblog entry on "Open Education License Draft," *iterating toward openness,* posted August 8, 2007,
   https://opencontent.org/blog/archives/355 (accessed December 13, 2017).

David Wiley

This was followed seven years later by the fifth R.[9] The elegant simplicity of these five statements has grabbed the attention of open educators everywhere and has become a standard and easy-to-remember method for describing how open licences work. The five Rs are:

1. **Retain**: the right to make, own, and control copies of the content
2. **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
3. **Revise**: the right to adapt, adjust, modify, or alter the content itself, e.g., translate the content into another language
4. **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
5. **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

Avoid copyright infringement

It is the responsibility of the open textbook author to ensure that all material in an open textbook — whether it be newly created or modified, such as images, data, or multimedia — does not infringe or induce the infringement of any third-party copyrights.

For more information, read How to Avoid Copyright Infringement.

The Digital Copyright Slider is tool that can be used to establish if works first published in the U.S. are still protected by copyright (in the U.S.) or in the public domain.

For individual assistance and specific questions, consult with an intellectual property/copyright expert at your institution or elsewhere.

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9. David Wiley, Weblog entry on "The Access Compromise and the 5th R," *iterating toward openness,* posted March 5, 2014, https://opencontent.org/blog/archives/3221 (accessed December 13, 2017).

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*For more information, see the [Authoring Open Textbooks chapter on **Understanding Open Licenses**](#).*

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5.

Fair Dealing and Fair Use

Open textbooks created or adapted under the supervision of and funded by BCcampus Open Education have *not* used the fair-dealing clause of Canada's *Copyright Act* when selecting external resources to be included in an open textbook or other open educational resources (OER). All materials created and external resources selected for these open textbooks are either released under an open-copyright licence or are in the public domain.

The definition of **fair dealing** according to the Library at Simon Fraser University is as follows:

> Fair dealing is a user's right in copyright law permitting use of, or "dealing" with, a copyright protected work without permission or payment of copyright royalties. The fair dealing exception in the *Copyright Act* allows you to use other people's copyright protected material for the purpose of research, private study, education, satire, parody, criticism, review or news reporting, provided that what you do with the work is 'fair'. If your purpose is criticism, review or news reporting, you must also mention the source and author of the work for it to be fair dealing.[1]

> For more information on fair dealing, see the University of Alberta Libraries' Fair Dealing and Applying Fair Dealing videos.
> For more information on fair use, see Code of Best Practices in Fair Use for Open Educational Resources.

If you work and live in the U.S., then you are likely concerned with **fair use**. According to the U.S. Copyright Office:

> Fair use is a legal doctrine that promotes freedom of expression by permitting the unlicensed use of copyright-protected works in certain circumstances.[2]

For guidance on using fair dealing or fair use, consult with an intellectual-property or copyright expert at your institution or elsewhere.

1. "What is fair dealing and how does it relate to copyright?" *SFU Library,* https://www.lib.sfu.ca/help/academic-integrity/copyright/fair-dealing (accessed January 23, 2018).
2. "Chapter 1: Subject Matter and Scope of Copyright - 107. Limitation on exclusive rights: Fair use," *Copyright.gov,* https://www.copyright.gov/title17/92chap1.html#107 (accessed January 23, 2018).

For guidance consult with your local copyright librarian or other expert

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6.

Concerns About Plagiarism

While using and/or changing the openly licensed work of others might feel like plagiarism. It isn't.

Merriam-Webster defines **plagiarize** as:

> to steal and pass off (the ideas or words of another) as one's own: use (another's production) without crediting the source[1]

Using material from an open textbook or other open educational resources (OER) and adding it to your own textbook is not considered plagiarism for the following reasons:

1. You are not stealing because the original author has already given you (and everyone else) permission to use and change their work by releasing it with an open-copyright licence.

2. You are not stealing or passing off the original author's ideas or words as your own because you will give the original author credit for their work with an attribution statement. Giving credit to the creator of a work is a legal requirement if you want to use an openly licensed resource.

For more information, read the Permission to Adapt chapter in the BCcampus Open Education *Adaptation Guide*.

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1. "plagiarize," *Merriam-Webster*, https://www.merriam-webster.com/dictionary/plagiarize (accessed August 8, 2017).

7.

Quality

Questions about the quality of open educational resources has been cited as one of the top three concerns among faculty who are considering adopting OER, including open textbooks, to use in the classroom.[1] Therefore, as an author of a textbook, it is vital to factor in the quality of your work during the planning stages.

The quality of an open textbook is determined by many different things. When designing a textbook, an author should consider the quality of the following aspects:

1. **Information**. Is it current, complete, relevant, and well-cited?

2. **Design**. Is it well-structured and consistent? Does it include pertinent learning objects and align with learning objectives for the intended curriculum or curricula?

3. **Accessibility**. Is the content in the book accessible to the greatest number of students?

4. **Copy**. Is the writing clear and concise? Is the text grammatically correct with no spelling errors? Is the writing style, spellings, layout (use of headings, bold, italics, etc.) used in an appropriate and consistent manner? Are all figures, tables, graphs, and other learning objects clearly identified, numbered, and labelled for easy reference? Is a style guide being used? Has a style sheet been created for the book?

Open-copyright licences allow people to share and build on knowledge, both of which are beneficial, and technology has made these tasks faster and easier. However, quick and simple sharing can also perpetuate an error made by the original author.

> If you decide to include a portion of a colleague's openly licensed work in your textbook, review it carefully as you would any supporting academic source.

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1. Rajiv Jhangiani et al., *BCcampus Research Report: Exploring Faculty Use of Open Educational Resources at British Columbia Post-secondary Institutions*, (Victoria, B.C.: BCcampus, 2016), https://open.bccampus.ca/files/2016/04/BCFacultyUseOfOER_final.pdf (accessed August 1, 2017).

II

Prepare to Write

<div style="text-align: center;">Section Topics</div>

This section includes:

- [Who Pays for This?](#)
- [Who Owns Copyright?](#)
- [Select a Licence](#)
- [Contributing Authors](#)
- [Identify Support](#)
- [Project Charter and Timeline](#)
- [Technology: Accounts and Training](#)

8.

Who Pays for This?

In terms of money, open textbooks are free for students, faculty, and anyone else to use. But they're not free to produce. If you decide to write and publish an open textbook, you need to think about how you are going to compensate not only the people who help you, but yourself as well. The cost of producing an open textbook is often underestimated by authors.

Before you begin, make a list of the individuals you will need to support your project and resources.

Funding and compensation comes in different forms. Besides cash, in-kind contributions should be considered. For example, your institution may offer support by providing access to instructional designers, librarians, or in-house copy editors. The OER Grants offered by BCcampus Open Education to faculty and staff in this province stipulate that:

> (s)uccessful applicants must secure matching funds by their institution (for the requested OER Grant amount) in advance of submitting a proposal.[1]

Typically, the creation of an open textbook is funded (often through grants) by:

- Open textbook projects
- Government (provincial or state, federal)
- Philanthropic organizations (e.g., Hewlett Foundation, Bill & Melinda Gates Foundation)
- Professional societies (e.g., Association for Psychological Science)
- Consortia (e.g., Center for Computer-Assisted Legal Instruction)
- A faculty author's post-secondary institution (grant, release time, in-kind contributions, other)

How BCcampus Open Education Began

On October 16, 2012, at the annual OpenEd conference in Vancouver, the then British Columbia Minister of Advanced Education, the Honourable John Yap, announced the creation of the B.C. Open Textbook Project.[2] The goal of the project was to make higher education more accessible by reducing student cost through the

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1. BCcampus Open Education, "Open Educational Resource Grant", https://open.bccampus.ca/open-educational-resource-grant/ (accessed February 15, 2018).
2. Ministry of Advanced Education, Innovation, and Technology, "B.C. to lead Canada in offering students free, open textbooks," News Release, October 16, 2012, https://archive.news.gov.bc.ca/releases/news_releases_2009-2013/2012AEIT0010-001581.htm (accessed January 23, 2018).

use of openly licensed textbooks. BCcampus was tasked with coordinating the project because of its ten-year experience funding open educational resources (OER) through the Online Program Development Fund.[3]

While open textbooks are still important, the B.C. Open Textbook Project is now known as BCcampus Open Education, a title that better describes its participation in open education initiatives.

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3. "BCcampus to co-ordinate provincial open textbook project," *BCcampus,* October 16, 2012, https://bccampus.ca/2012/10/16/bccampus-to-co-ordinate-provincial-open-textbook-project/ (accessed January 23, 2018).

9.

Who Owns Copyright?

Who are the copyright owners for your open textbook?

Determining who will own copyright for the various components in an open textbook — before writing begins — is very important. This was one of the first items that BCcampus project managers discussed with authors, and the results were included in the contracts they signed. We learned early on that a faculty's contract with their employer might state that the institution owns copyright for all writings produced during employment. Therefore, we needed to be careful about copyright ownership: was it with the author or the author's employer? (See Copyright and Open Licences.)

It's possible that, as the primary author and publisher, you will decide to pay contributors for their work and their copyright. If this is the case, outline this condition in those contracts. A writer who is paid this way is called a **write for hire**.

Here are potential copyright owners participating in the creation of an open textbook.

- Primary author
- Primary author's institution
- Contributing authors
- Photographers
- Illustrators
- Graphic designers or others who contribute tables, graphs, charts, etc.
- A contributor's institution

It is not usual practice to include copy editors and proofreaders as copyright holders. Instructional designers, who assist with the layout of a textbook but do not contribute content, are also not included.

Once you've established who owns copyright to specific material in the textbook, decide how you will

acknowledge each creator for their work. This information should be recorded in your project timeline. (See Project Charter and Timeline.)

Talk to the copyright librarian or other intellectual property (IP) expert at your institution for additional assistance or questions on this topic. (See Copyright and Open Licences.)

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Attributions

Crowd by geralt has been designated to the public domain (CC0).

10.

Select a Licence

By definition, an open textbook is *open* because the author has decided to share their copy rights with others. This decision is indicated by posting a statement, and sometimes logo, describing the open-copyright licence — most often a Creative Commons licence. (See Creative Commons licences.)

Other times, the author chooses to release or designate their copy rights to the public domain. Creative Commons has created two public domain tools for authors who select this option. (See Public domain tools.)

Creative Commons Information Pack

The National Copyright Unit and Creative Commons Australia have jointly developed the Creative Commons Information Pack for teachers and students on Creative Commons (CC). The pack explains what CC is, how to find CC material, and the best way to attribute CC material.

> ### CC Licence Selection Tool
>
> Use the Creative Commons Licence Chooser to select the appropriate license for your work. This site does not store any information.

Combining CC licences

This video, Creating OER and Combining Licenses-Full, was created in 2012 by TheOGRepository. It aims to help you choose compatible resources and choose a valid license for your work.

> *One or more interactive elements has been excluded from this version of the text. You can view them online here: https://opentextbc.ca/selfpublishguide/?p=196#oembed-1*

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Attributions

[Creating OER and Combining Licenses](#) video by the [TheOGRepository](#) is used under a [CC BY-SA 3.0 Licence](#).

11.

Contributing Authors

None of us is as smart as all of us.

— a Japanese proverb[1]

As you plan the content of your book, think about experts in your field who might write on a specific topic. To help make a decision about who to approach, ask yourself if contribution from an individual will *add value* to your textbook and whether or not they have the *experience* to author a chapter or section for a textbook. Familiarity with open education is a plus.

The BCcampus Open Education team oversaw the production of fifty-four new open textbooks and ten major adaptations during its initial phase. Inviting collaborators to participate was left to the lead author who had proposed the textbook idea to us. It was felt that, as the subject-matter expert, this individual was most qualified to make these decisions. From the sidelines, our project managers watched the interplay between the primary author and their contributors. We learned what worked and what didn't, and how problems could be avoided in the future.

The biggest lesson learned was the importance of establishing expectations for your contributors before writing begins. If you decide to invite one or more colleagues to provide material to your textbook, determine the parameters of this business relationship and then clarify with each author the following points:

1. Who will own copyright

2. Disclose the type of open-copyright licence that will be used to release the book. Be prepared to answer concerns and questions for colleagues not familiar with open textbooks.

3. Decide if contributing authors will be compensated for their efforts. Be clear about how much they will be compensated or paid.

4. Provide written details about their contribution, including:

   1. the topic — be specific

   2. length of their work by word count

   3. layout of the contributing piece including sections and subsections, number and type of images, tables, graphs, or other support resources

   4. the timeline and deadline for the first and subsequent drafts

   5. the timeline and deadline to review questions from the copy editor and make revisions

1. "Proverbs," http://web.mit.edu/levitsky/www/proverbs.html (accessed October 26, 2017).

Use a contract or written agreement to clearly describe these expectations so there are no misunderstandings. (See [Appendix 4: Contracts](#).) This will be a valuable document to reference if either party has questions during the writing process.

If you plan to include students as contributing authors, refer to *[A Guide to Making Open Textbooks with Students.](#)*

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12.

Identify Support

Many hands make light work.

— English Proverb [1]

Self-publishing a book is not new. With advances in technology and the advent of the Internet, this endeavour has been made that much easier. Still, producing your own book — especially a well-written, high-quality textbook — is a big undertaking, and for best results should include a team of individuals, each armed with skills that would otherwise be filled by employees at a publishing firm. Remember: When you self-publish, you become the publisher.

BCcampus published over fifty open textbooks. Each author was assigned a project manager — similar to a managing editor — who organized book layout, scheduled copy editing and proofreading, attended to editorial development, ordered the textbook cover, and saw that the book was promoted and posted in the B.C. Open Textbook Collection. When we moved to the next phase of our work and encouraged authors to look to their post-secondary institutions for support, it was recognized that many of the publishing tasks — previously filled by BCcampus staff — fell to the author. This realization was one of the impetuses for writing this guide.

The Publisher's Role

A publisher, particularly one that specializes in textbooks, is responsible for managing all aspects of the book's production, save the writing; that's the author's job. Still, the publisher guides the development and refinement of the author's ideas and words. Below are some of the roles typically filled by the publishing team. [2]

- Project management. The managing editor tracks assigned tasks for all staff, including the author.
- Book outline and layout. Publishers typically require a book outline from the author. However, a developmental editor will review it to ensure that all necessary elements are included and properly organized.
- Design (textbook cover, font, and layout) and art direction (illustrations, graphics, tables, and figures)
- Copy editing and proofreading
- Marketing, promotion, and distribution

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1. "many hands make light work," *Dictionary.com,* http://www.dictionary.com/browse/many-hands-make-light-work (accessed October 27, 2017).
2. Harold Underdown, "What a Publisher Does: Key Roles," *Underdown,* http://www.underdown.org/publisher-expertise.htm (accessed August 16, 2017).

Find help

As you list how and who will pay for your textbook (see Who Pays For This), include your support — or publishing — team. At your home institution, look for support from:

- Instructional designers (for design and layout)
- Graphic designers or illustrators (for images)
- Librarians (for copyright and licence information, and help evaluating resources and repositories)
- Technical support (assistance with authoring platforms, videos, and audio files)
- Student assistants (for gathering external resources and working as fixers). (See Fix as You Go.)

Outside of your post-secondary institution, look to:

- Colleagues at other institutions
- Your professional organization
- Open-textbook and OER communities

As the OER movement advances, several groups have come forward to support the efforts of open textbook authors and self-publishers. Below are some to consider.

- **Rebus Community** is made up of faculty, staff, and students from post-secondary institutions and other organizations from around the globe who support the work of open textbook authors and projects. Talents include project management, copy editing, proofreading, writing, and other skills.
- **GitHub** is a development platform that includes open-source projects such as open textbooks. For more information, see Appendix 2: Developers and Technicians in the BCcampus Open Education *Pressbooks Guide*.
- **CCCOER** offers a Community of Practice for Open Education. Their community email provides an easy way to ask colleagues questions about open education, open practice, and where to find specific open textbooks and OER.

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*For more information, see the [Authoring Open Textbooks](#) chapters on **[Community Support](#)** and **[Institutional Considerations](#)**.*

13.

Project Charter and Timeline

Project manage your open textbook

Writing and publishing an open textbook will take longer than you think. Plan for thinking time. Be prepared to incorporate new ideas as you conduct your research. Be ready to cut material that doesn't work. Our team began each textbook project with a well-thought-out plan and timeline. Early meetings with the author included the communication plan, instructions on what each stage would entail, deadlines for each chapter, how and when the copy editors would contribute, and all phases that led to the release of the finished product.

We have created templates to help you plan the many details of producing a textbook:

- [Project-Charter template [Word file]](#)
- [Project-Timeline template [Word file]](#) (This template can be used to record and track specific tasks throughout the book's creation process and the individuals who will be performing them.)

Timeline tasks

There are many steps to producing a textbook, and each of those steps involve multiple responsibilities. As you record these on your timeline, calculate how long each will take — and then add some additional time as a buffer. (See [Appendix 5](#) for checklists that match the chapters and chapter sections in this guide.)

1. **Research.** Track all references carefully as would be done for any academic work. If you are using openly licensed text, images, or other resources, place close attention to the legal requirements for the licence. (See [Research](#).)

2. **Gather or create resources**. Resources may include photos, illustrations, graphs, tables, figures, videos, audio files, or spreadsheets. Remember, if you're using someone else's work, it must be openly licensed or in the public domain. If a resource is copyrighted and all rights are reserved, you may provide a link to it. However, linking should only be used as a last resort when an openly licensed resource cannot be located. (See [Resources: Only the Open](#).)

3. **Write the book outline.** This includes chapters, chapter sections, front and back matter, learning objectives, exercises, key terms and takeaways, and the glossary. Outline how chapters and chapter sections will be laid out. (See [Textbook Outline](#).)

4. **Find supplemental resources.** Not all textbook authors or publishers create ancillary or supplemental resources, such as test banks, for their books. However, many instructors and students find them helpful, and textbooks with supplemental materials are often highly adopted. Determine what your textbook will need in order to be most effective.

5. **Plan each chapter.** During the book-outline phase, determine the structure for each chapter in addition to the research and resources required to write it. Record these in your timeline beside the designated author. Use this information to calculate how long each chapter will take to complete. Remember to build in extra time for the beginning phase of the project, as this is when you and your team are learning to work together and with the textbook, and for any unanticipated delays. While working with many authors is a good way to incorporate expertise and multiple viewpoints, it will take extra time as you or your project manager communicate with the team and manage their work. (See [Textbook Outline](#), [Contributing Authors](#), and [Identify Support](#).)

6. **Peer review.** Schedule time for the peer review of your textbook by subject-matter experts. (See [Peer Review](#).)

7. **Fix as you go.** As you go, expect to be regularly reviewing the style and format as well as auditing external images and resources to ensure all are openly licensed or in the public domain. (See [Fix as You Go](#).)

8. **Copy edit.** Have the book copy edited. (See [How to Copy Edit](#).)

9. **Proofread.** Have the book proofread. (See [How to Proofread](#).)

10. **Prepare for publication.** Conduct a final check of your book and set up print-on-demand copies. (See [The Final Check](#) and [Print-on-Demand Copies](#).)

11. **Promote.** Launch and communicate about your new book. (See [Communications](#).)

And as you build in extra time to each phase of your timeline, remember Hofstadter's Law…

It always takes longer than you expect, even when you take into account Hofstadter's Law.

–Douglas Hofstadter in *Gödel, Escher, Bach: An Eternal Golden Braid*.[1]

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*For more information, see the [Authoring Open Textbooks](#) chapter on [**Developing a Timeline**](#).*

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[Project Management](#) by [TheDigitalArtist](#) has been designated to the [public domain (CC0)](#).

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1. "Hofstadter's Law," *Wikipedia,* https://en.wikipedia.org/wiki/Hofstadter%27s_law (accessed January 5, 2018).

14.

Technology: Accounts and Training

If you decide to use an authoring platform, such as Pressbooks or Scalar [New Tab], to create your textbook, you must also ensure that all participants have accounts to access the platform and the training to use it. While this latter item will require additional effort, it is worth the time in order to avoid confusion and mistakes during production.

This chapter uses Pressbooks as an example of an authoring platform.

BCcampus Pressbooks home page

Determine access

Begin by determining who should have access. If you have multiple authors, it's often best to restrict access to the book in Pressbooks to one or two "gatekeepers" to maintain the textbook's formatting, style, and layout. One of the gatekeepers might be the individual responsible for reviewing and fixing the textbook as they will be very familiar with the book's flow. Others who will need platform access are the copy editor and proofreader. (See Fix as You Go, How to Copy Edit, and How to Proofread.)

If you wish others to view the textbook, but do not want them to have editing or administrative privileges, "view only" rights can be granted or a generic account can be created for all who require in-progress viewing access.

The BCcampus Open Education *Pressbooks Guide* contains information specific to Pressbooks. This guide will explain how to set up a Pressbooks account and how to add an author, editor, or other user to your textbook. (See Setting up an Account: Where to Begin and Adding an Author or Editor to a Book.)

Platform set-up, training, support

Once you have established the required accounts for Pressbooks, or other authoring platform, then it's

time to create the book shell. Information on setting up a book, importing a Pressbooks or WordPress file, and importing a Word document are all covered in the BCcampus Open Education *Pressbooks Guide*. However, listening to a recorded session or viewing the PowerPoint slides from past Pressbooks Training webinars, or watching a Pressbooks Tutorial video can help. You may also consider hiring an expert to offer a training session to your support team.

Lastly, identify who will provide technical support. Many platforms and systems have very good support resources available; however, it's always nice to have a friendly, knowledgeable individual to call on. The helpdesk or teaching-and-learning centre at your university or college is a good place to start.

Other technology

In addition to the system you'll be using to house and create your textbook, consider all other technologies that will be needed. These might include:

- ◦ Video-creation software and hosting platforms, e.g., Audacity
- ◦ Audio-recording systems and hosting platforms
- Graphic-design software
- Repositories containing openly licensed media (See Resources: Search and Find.)

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*For more information, see the [Authoring Open Textbooks](#) chapters on **[Publishing Tools](#)** and **[Authoring Tools](#)**.*

III

Plan Your Book

Section Topics

This section includes:

- [Five Rules of Textbook Development](#)
- [Open Textbook Formats](#)
- [Accessibility, Diversity, and Inclusion](#)
- [Textbook Outline](#)
- [Create a Style Sheet](#)

15.

Five Rules of Textbook Development

The below list provides five rules that help guide the development of a good textbook.[1]

1. 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.

2. 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.

3. 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.

4. Rule of hierarchy

Our mental frameworks are hierarchical. Learning is aided by using the student's ability to couple or link new material with that already mastered. When presenting new domains for hierarchical understanding,

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1. "Wikibooks:Textbooks considerations," Wikibooks, https://en.wikipedia.org/wiki/Wikibooks:Textbook_considerations (accessed January 24, 2018).

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.

5. Rule of repetition

Most people learn by repetition, and only a few with native genius can achieve mastery without it. There is a pattern of repetition that aids in promoting the elements of a subject from short-term to long-term memory. Implementations of this rule may mean that frameworks and important hierarchies are repeated as many as five or six times, while frequently used elements are repeated three or four times, and elements of lesser utility may not be repeated at all. The first repetition should normally occur within a day of first presentation, followed by a gradually decreasing frequency. Exercises and review sections are ideally contributing to a designed repetition pattern.

5 Rules of Textbook Development [Long Description]

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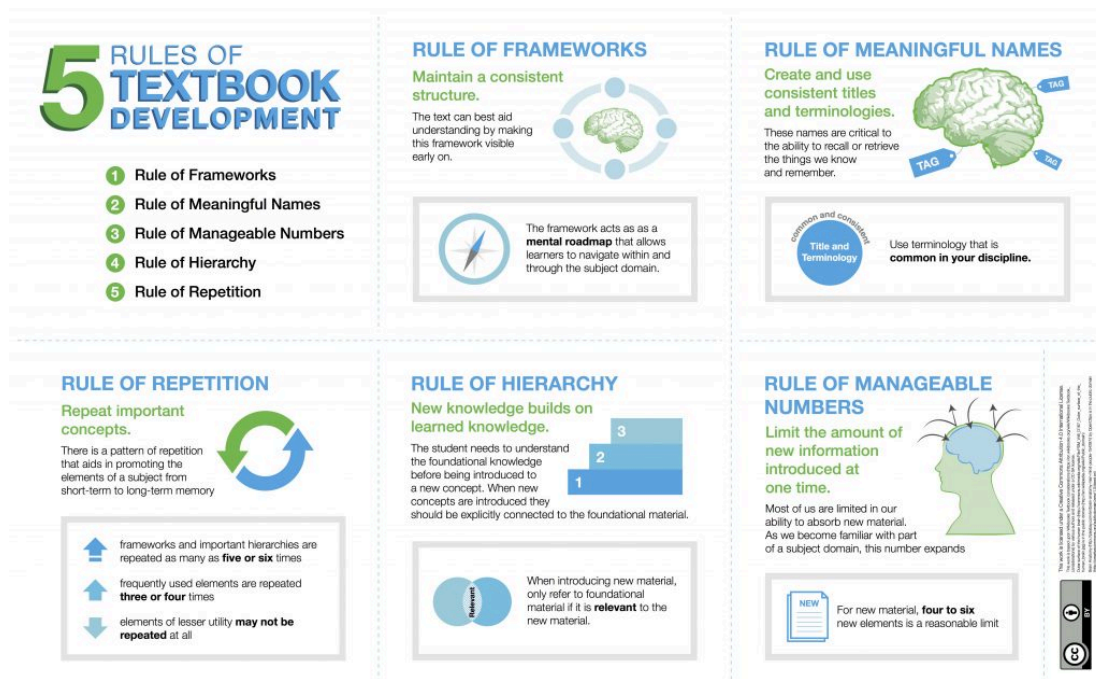
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Long Descriptions

5 Rules of Textbook Development long description:

1. The rule of frameworks means maintain a consistent structure. The text can best aid understanding by making this framework visible early on.

2. The rule of meaningful names means create and use consistent titles and terminologies. The names are critical to the ability to recall or retrieve the things we know and remember.

3. The rule of manageable numbers means limit the amount of new information introduced at one time.

4. Rule of hierarchy means new knowledge builds on learned knowledge. The student needs to understand the foundational knowledge before being introduced to a new concept. When new concepts are introduced the should be explicitly connected to the foundational material.

5. The rule of repetition means 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.

[Return to 5 rules of textbook development image]

16.

Open Textbook Formats

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.

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).

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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).

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 be 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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17.

Accessibility, Diversity, and Inclusion

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.[1]

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 licences 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 learning styles and ensuring the content can be accessed by all, regardless of disability. It also means creating materials that include diverse viewpoints and voices. As you plan your textbook, contemplate how to design it so it is accessible, diverse, and inclusive.

Read what your colleagues are saying about [Equity, Diversity, Inclusion & Open Education](#).

Accessibility

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.

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1. "Open Educational Resources," *UNESCO*, http://www.unesco.org/new/en/communication-and-information/access-to-knowledge/open-educational-resources/ (accessed September 20, 2017).

Reducing Barriers to Access

Barrier Type	Challenge	Solution	Example
Physical Impairments	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.	All images in *Introduction to Psychology – 1st Canadian Edition* have alt-text.
	Hearing impairment or deafness	Add transcripts and captions to all audio content.	The instructional videos created for *Concepts of Biology-1st Canadian Edition* are all captioned.
	Motor-skill impairment, immobility	Provide file formats that can be uploaded into a variety of mobile devices.	*Introduction to Tourism and Hospitality in BC* has a number of file types available.
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.	Common Core Trade series (23 books) has audio files that accompany the text content.
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.	The PDF of *BC Reads: Adult Literacy Fundamental English – Reader 1* uses large text.
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.	All books in the B.C. Open Textbook Collection can be accessed online.
	Unreliable or no access to the Internet	Set up a service that can supply a print-on-demand copy.	See the print-on-demand option for *Principles of Social Psychology – 1st International Edition.*

Refer to the BCcampus Open Education *Accessibility Toolkit* for information on how to make sure you create an accessible textbook. (A French version is also available.) There are a number of accessible textbooks in the B.C. Open Textbook Collection. They are flaged as "Accessible" when they meet all requirements on the Accessibility Checklist.

The National Center on Universal Design for Learning also offers guidelines on how best to design educational resources so that students with a variety of learner styles benefit. You can also watch this

video produced by the University of British Columbia: <u>Open Dialogues: How to make open content accessible</u>.[2]

Diversity and inclusion

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

Question 10 on the BCcampus Open Education <u>Review Rubric [Word file]</u> addresses the issue of diversity and inclusion. (See <u>Textbook Reviews</u>.)

Ethnocentrism

Whether intentional or not, **ethnocentrism** — "a tendency to view alien groups or cultures from the perspective of one's own"[3] — 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.

Once your book is published, if instructors from another country and culture want to use your work, they may customize it for their classroom needs. The changes made might include:

- Translating the book into a different language
- Adjusting the content to meet the local cultural, regional, and geographical needs
- Revising the material for a different learning environment

2. <u>https://youtu.be/wXL5AmfFT_o</u>
3. "ethnocentrism," *Dictionary.com,* http://www.dictionary.com/browse/ethnocentrism (accessed December 11, 2017).

For more information see [Reasons to Adapt an Open Textbook](#) in the BCcampus Open Education *Adaptation Guide*.

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18.

Textbook Outline

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 Matter[1]

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).
Copyright page	Publisher	On the verso of title page, the following may be included: • 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 **foreword** 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.

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

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

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 Matter[2]

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.)
Index	Publisher	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.
Versioning history	Publisher	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.

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

Attributions

Front Matter and Back Matter tables: Some of this information was taken from [Book design](#) on Wikipedia and is used under a [CC BY-SA 3.0 Licence](#).

19.

Create a Style Sheet

A style guide should be used when writing an open textbook to ensure that style and formatting is consistent throughout the work. (See Appendix 2: Style Guide.) Style guides usually include **citation style** as well, i.e. how cited or referenced material should be treated both in the text (in-text) and within the reference list. Commonly used style guides include,

- *APA Style*. **APA** (American Psychological Association) **style** is typically used to cite and style works in the social sciences and education.
- *The Chicago Manual of Style Online*. **Chicago style** is most often used to cite and style works in the humanities. This style was developed by the Chicago University Press in 1906. [1]
- *MLA Style Manual*. **MLA** (Modern Language Association of America) **style** is most frequently used to cite and style works in the literary and humanities fields.
- The *Canadian Press Stylebook*. The Canadian Press style is the standard for style guide for those working in the media and communications.

In addition to selecting a style guide, it is advised that a style sheet be created and updated throughout the writing process. A **style sheet** is a record of the styling and formatting exceptions for your textbook, such as spelling choices, selection and placement of learning objects, and differences in punctuation, layout, and style from the style guide. Frequently used style elements can also be noted on the style sheet for easy reference, especially during the copy editing and proofreading stages.

How to set up and use a style sheet

Here is a template you can use to set up the style sheet for your open textbook:

- Style-Sheet template [Word file]

1. Download the above style-sheet template and fill out as much information as possible, including book title, author, copy editor, and proofreader.
2. Add or remove items as they pertain to your book. These might include:

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1. "What is Chicago Style?" *University of Pittsburgh: University Library System,* http://pitt.libguides.com/c.php?g=12108&p=64732 (accessed January 3, 2018).

      1. exercises (and how to format them)

      2. back matter and/or appendix information and how to label each

      3. key terms: how and when to highlight them in the text body and if they should be summarized in an end-of-book glossary

3. In addition to different or additional styles and formatting, you can list:

      1. styling issues included in the style guide, but repeated in the style sheet for easy reference

      2. the correct usage of grammar and spellings that are often inaccurate

4. Change and update the style sheet throughout textbook production. Update the style sheet each time you make changes or add to it and share it with your team.

5. When the book is finished, date the style sheet and mark it as the "final copy." This reference document can be shared as part of your textbook when it's published.

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IV

Write ... and More

<div style="border: 1px solid #000;">

Section Topics

This section includes:

- [Research](#)
- [Citation vs. Attribution](#)
- [The Writing](#)
- [Resources: Only the Open](#)
- [Resources: Search and Find](#)
- [Resources: Captions and Attributions](#)
- [Embedding and Linking](#)
- [Screenshots of Software](#)
- [Fix as You Go](#)

</div>

20.

Research

Conducting thorough research first saves time when writing an open textbook

The writing portion of a textbook begins with research. In some cases, collecting and organizing the research can take longer than the actual writing. However, it's time well spent by both you and your contributing authors, especially if it's done well and thoroughly.

Like any scholarly work, it's important to choose appropriate sources when conducting research for a textbook and then cite or attribute them correctly (see Citation vs. Attribution). The UBC Library Research Help page offers valuable step-by-step advice. For example, in a section entitled "Evaluating Information Sources," their response to the opening question of "Why Evaluate?" is:

> You will need to evaluate each resource you use for research, whether it is an online or print journal article, a website, a book, a newspaper article, or other source that you want to cite. Use the questions in this guide to analyze materials and to assess how appropriate they will be for your research. Keep in mind that many publications have a particular bias or agenda, which may not be obvious at first glance.[1]

To help organize collected items, consider using a source management tool like Zotero (free and open source) or Mendeley (free and run by publisher Elsevier).

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1. "Evaluating Information Sources," *UBC Library,* http://help.library.ubc.ca/evaluating-and-citing-sources/evaluating-information-sources/ (accessed February 2, 2018).

In addition, the following steps may help as you gather research and resources.

1. Write down the knowledge you have accumulated on your textbook's topic. If you're an instructor, it's likely this information is part of your course package or curriculum notes, or something you talk about in the classroom. However, unless this information is common knowledge or based on original research, you must cite it.[2]

2. Look at other open textbooks on the same or similar topics to see if they contain sections/chapters that can be adapted or used in your book. (See the Open Textbook/OER Directory.)

3. Before you expand your search, read these three chapters: Resources: Only the Open, Resources: Search and Find, Resources: Captions and Attributions

4. If possible, follow resources — be they text or images — back to the original source so you're confident that they are truly openly licensed.

5. Keep concise records of all sources you reference and cite in your textbook, including journal articles (online and off), newspapers, books, government documents, reports from a private organization, conference proceedings, dissertation, online lecture notes, email, blogs, wiki, websites, and video podcasts.

6. Note the date when accessing an online resource and its **URL (Uniform Resource Locator)** or web address.

7. Record all the information you will need to cite a resource properly. Purdue University's Online Lab (OWL) provides very good research and citation resources for writers.

8. If your research requires conducting interviews, record them. Consider asking the subjects you interview to sign an interview consent and release form (see word file below). Taking these steps clarify for the interview subject the purpose of the interview and how and where their words will be used.

Here is a template of an interview consent and release form that you can use if you will be conducting interviews:

- Interview consent and release form [Word file]

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2. "What is Common Knowledge?" *Academic Integrity at MIT: A Handbook for Students*, https://integrity.mit.edu/handbook/citing-your-sources/what-common-knowledge (accessed August 8, 2017).

Attributions

Knowledge by Dariusz Sankowski has been designated to the public domain (CC0).

21.

Citation vs. Attribution

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

Outside ideas and information provide evidence that build an argument or lay the foundation for a textbook's topic. A strong textbook will appropriately reference these sources, showing the student reader where information and ideas that do not originate with the open textbook author come 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.

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. The Oxford Living Dictionary defines it as a "…quotation from or reference to a book, paper, or author, especially in a scholarly work."[1] To exclude citation of a resource referenced in your own work places you at risk of plagiarizing. Plagiarizing is the act of passing another individual's ideas or work as your own. (Also see Concerns About Plagiarism.)

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 a scholar and potential author of an open textbook, we assume that you are familiar with the rules around citation. However, the article Warning: When You Must Cite from the Yale Center for Teaching and Learning provides some guidance about how, what, and the amount of a work that can be cited. (See Textbook Citation.)

Attribution

Attribution is the cornerstone condition when using a resource or text released with an open-copyright licence. This legal requirement states that users must attribute — give credit — to the creator of the work. (See Copyright and Open Licences.)

1. "citation," *Oxford Dictionary*, https://en.oxforddictionaries.com/definition/citation (accessed February 6, 2018).

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

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 of the work, name of the creator, and licence type (with links to each). When using text from another open educational resource, be clear in your attribution statement what section of your textbook contains this information.

A useful tool to help create attribution statements is the OPEN Attribution Builder by Open Washington. (See also Resources: Captions and Attributions.)

Differences

Citation and attribution serve different purposes.

- Citation is used for academic reasons 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 fulfills the legal requirement of the open-copyright licence, which requires you to give credit to the creator of the work.

- Citation is used for restricted 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 Concerns About Plagiarism and Copyright and Open Licences.)

- 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 — 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.	Copyright **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 give 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.

Similarities

There are also similarities between a citation and attribution.

- Both can be — and often are — copyrighted. (See [Copyright and Open Licences](.).)

- 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

Special cases

Citing and attributing a closed online resource

Resources kept in a closed system, such as password-protected platform, can still be cited and attributed in an OER. Below are templates and examples showing how based on APA guidelines. (For other examples, see style guides to your preferred citation style.)

Citation – APA

When a resource cannot be accessed publicly, [APA citation style](#) states it should be treated as a personal communication. Additionally, only a parenthetical in-text citation is required, without inclusion in the reference list. See below for a template and example that can be used for the in-text citation.

- **APA citation template** (in-text citation): Author, personal communication, Date of access.

Example of a citation (APA) for a closed online resource

- J. Doe, personal communication, May 10, 2022.

If you wish to clarify that the personal communication is in fact a closed online system, here is a suggestion for how the in-text citation might read:

- J. Doe, Anywhere College SharePoint (internal access only), May 10, 2022.

If you plan to publish a resource currently stored in a restricted system, then it can be cited as an unpublished manuscript using this template.

- **APA citation template**: Author. (Year published). *Title of manuscript* [Unpublished manuscript]. Faculty department, Name of post-secondary institution.

Example of a citation (APA) for a closed online unpublished resource

- Doe, J., Smith, M., & McDonald, P. (2022). *The effects of sugar on children's health* [Unpublished manuscript]. Department of Biology, Anywhere College.

Citation – MLA

If your preference is the MLA citation style then treating a resource within a closed online system as an unpublished document makes sense. Below are the template and an example of how this can be done.

- **MLA citation template**: Author. *Title of Manuscript/Document*. date of composition (at least year), along with "the name and location of the library, research institution, or personal collection housing the material."

Example of a citation (MLA) for a closed online resource

- Henderson, George Wylie. *Baby Lou and the Angel Bud*. Collection of Roslyn Kirkland Allen, New York.

Attribution

The legal code for Creative Commons licences states that "When a URI or hyperlink to the Licensed Material to the extent *reasonably practicable* (emphasis added)." In other words, providing a link to the OER to be attributed is not legally required. You must just do your best to provide one if available.

Therefore, if you wish to include some or all of a private or non-accessible online resource (that is openly-licensed) in another OER, here are suggested templates for the attribution statement for those closed system OER.

Example of an attribution statement for a closed online resource

This chapter is an adaptation of *Natural Disasters and Human Impacts* (in Anywhere College

Tables

When BCcampus Open Education began publishing open textbooks, we discovered that there were few openly licenced tables that our authors could use. So, with the help of our copy editors, we developed a way to present information in a table format without violating copyright.

We learned during our research that a table is comprised of two parts:

1. The style or layout of the table, which displays the information. These elements can include the size, placement, and colour of the cells; the style of fonts; and the wording and placement of column and row headers.

2. The data or information contained within the table

Style

Main Label	Column One	Column Two	Column Three
Row One			
Row Two			
Row Three			

Data

Main Label	Column One	Column Two	Column Three
Row One	Information 1	Information 2	Information 3
Row Two	Information 4	Information 5	Information 6
Row Three	Information 7	Information 8	Information 9

Our solution was to instruct authors to create an original table, and then cite the data added to that table. As you can see in the below example from *Introduction to Tourism and Hospitality in B.C.,* we provided the source for the data in the last row in the table. For clarity, we labelled this in-text citation as "Data source."[2] Alternatively, you could add the source information to a footnote.

2. Morgan Westcott, "Chapter 2: Transportation," in *Introduction to Tourism and Hospitality in B.C.,* ed. Morgan Westcott, (Victoria, B.C.: BCcampus, 2015). https://opentextbc.ca/introtourism/chapter/chapter-2-transportation/.

Table 2.1: Milestones in the commercial aviation industry.

[Skip Table]

Year	Milestone
1919	KLM Koninklijke Luchtvaart Maatschappij or Royal Dutch Airlines) starts operations, making it the oldest airline still in operation.
1930	Boeing Air Transport (now known as United) introduces the first flight attendant.
1934	The first piece of airmail travels across the Atlantic via Deutsche Luft Hansa (now Lufthansa).
1939	The first passenger flight travels across the Atlantic on Pan American airlines.
1944	The Chicago Convention on International Civil Aviation [PDF] takes place, giving rise to the aviation industry as we know it.
1952	The first passengers travel by commercial jet on British Overseas Airways Corporation (BOAC).
1971	The first low-cost carrier is introduced as Southwest Airlines enters the market.
1976	The Concorde enters service as the first supersonic aircraft.
1978	The United States deregulates the air industry.
1981	American Airlines introduces the first frequent flyer program.
2007	Singapore Airlines introduces passenger service aboard the Airbus A380 (currently the world's largest passenger aircraft).
2011	KLM operates the first passenger biofuel flights.
Data source: IATA, 2014a	

Table 2.1 from Introduction to Tourism and Hospitality in B.C.

The original table, created by the author or a designer working with the author, is an original creation. Because of this, no attribution statement is required. The table design is copyrighted by the author (or designer). However, as the data comes from an external source, it requires a citation. This same process can be applied to charts and graphs.

Citation-Attribution Fusion

The libraries at Thompson Rivers University in Kamloops have come up with a clever solution to the citation versus attribution dilemma. In the Crediting Images found Online section of their *APA Citation Style* web page, they suggest modifying the APA citation style so it incorporates open licence or public domain information for the image's caption and reference. Here is an example.

The image and its caption would appear like this:

Figure 2. Yellow-bellied Marmot Pups – Kamloops, BC., by A. Vern, 2007, http://commons.wikimedia.org/wiki/ File:Yellow-bellied_Marmot_pups_-_Kamloops,_BC..jpg. Used under Creative Commons Attribution 2.0 Generic License: http://creativecommons.org/licenses/by/2.0/deed.en

The corresponding reference would be laid out like this:

Vernon, A. (Photographer). (2007). Yellow-bellied marmot pups – Kamloops, BC [digital image]. Retrieved from Wikimedia Commons website: http://commons.wikimedia.org/wiki/File:Yellow-bellied_Marmot_pups_-_Kamloops,_BC..jpg

For more information, see Textbook Citation in this guide
and Attribution Statement in the *Adaptation Guide*.

Page added: Feb 20/18 | Last update: May 11/22

Attributions

1. The concepts and portions of this text have been taken from Quill West's presentation for Pierce College called *Citations vs. Attributions. And how to deal with them in your work* and is used under a CC BY 4.0 Licence.

2. Table 2.1 by Morgan Westcott is used under a CC BY 4.0 Licence.

22.

The Writing

Writing a textbook that is coherent takes discipline, endurance, and determination. Depending on the length and subject matter of your book, you will need to carve out an extended schedule to think and write. The detailed outline and project timeline created at the beginning of a self-publishing endeavour will help guide your writing efforts. (See Textbook Outline and Project Charter and Timeline.)

We have worked with many faculty authors and watched as they attempted to write an open textbook off the side of their desks (and in the evenings and on the weekends). While possible, this approach is not ideal and certainly not fun. We tell authors-to-be that writing a book will be more time consuming and challenging than they can image. To help them prepare, we suggest they:

- Clear their personal and professional schedule as much as possible.

- Obtain release time, apply for a sabbatical, use vacation time, or take paid (or unpaid) leave that can be devoted to writing their textbook.

- Ask for help.

Secrets of a Writer

I was a published author for fifteen years and practised my craft in a home office surrounded by two young children and household chores begging to be done. To survive and succeed as a writer, I developed the following routine.

- Get enough sleep, eat a balanced diet, exercise, and take breaks throughout the working day. Writing is tiring and it's difficult to write when you're not feeling well.

- Figure out the times of day when you write efficiently and do your best work. Take advantage of these times to get writing done.

- Restrict writing time to a specific time of the day. This will force efficiency and prevent endless writing on and off throughout the day, which can be exhausting.

- Find a quiet place to work.

- When you write, just write. Don't give into distractions such as answering the phone, texting, emailing, or doing laundry.

- Don't worry about perfecting or revising your work, particularly during the first draft. Allow the words to flow. Editing will come later.

- Allow a realistic amount of time to write the book, a chapter, or a section assigned that day, week, or month. Don't underestimate how long it takes to write a textbook.

- Don't give into writer's block. When creativity is evasive, work on something mechanical such

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as:

- pasting blocks of research into the book (with citations and attributions)
- writing image captions
- adding resources such as suggested reading lists, exercises, and key takeaways

Writing a book will never feel finished. There is always something that can be changed, improved, or added. At some point you will need to stop and tell yourself, "good enough."

Mind control

Because writing is a creative process, it can feel incessant, occupying your thoughts night and day. Calm your frenzied mind by enlisting these practices.

1. Record stray ideas that come to mind when not writing to come back to later.
2. Keep a notebook by your bedside for middle-of-the-night thoughts that wake you up.
3. Brainstorm by recording as many ideas as possible on a specific topic or problem.
4. Begin each writing session with ten minutes of unedited scribbling to clear your mind and jump-start creativity.
5. Experiment with paper and pen. Some find this method assists with processing ideas.
6. Allow ideas to sit for a day before reviewing them for value.

Page added: Feb 20/18 | Last update: Oct 13/21

*For more information, see the Authoring Open Textbooks chapter on **Writing Process**.*

23.

Resources: Only the Open

If you are writing a new textbook (or other open educational resource) or adapting an existing one, it's important that all of the content meets open-copyright licence requirements or is in the public domain. (See [Licences and Tools](#) and [Copyright and Open Licences](#).)

Is your material really open?

As the author and publisher of an open textbook, you have agreed to release your work with an open-copyright licence. However, open educational resources often include materials from external sources. (See [Resources: Search and Find](#).) And it is the licensing conditions of these items that must be carefully examined before incorporating them in your open textbook. Follow the below steps to ensure that all material you find on for your book is open. Don't assume that any item posted on the internet is free or free to use.

1. Look for the **copyright notice**. This information lists the copyright symbol (the letter C inside a circle) or the word "copyright" followed by the year in which the work was created, and therefore copyrighted, and the name of the copyright owner.
    1. NOTE: A copyright notice does not automatically mean that a resource is not permitted in an open textbook. In fact, most open resources *are* copyrighted.
    2. Here is an example: Copyright 2018 Lauri Aesoph.
2. Look for a **statement of rights**. This statement outlines the conditions of use or permissions granted by the copyright holder — for example using a Creative Commons licence — and is part of the "copyright notice".
    1. If not included, it can be assumed that the copyright holder grants no permissions and that "all rights are reserved".
    2. Here is an example of a copyright notice that includes a statement of rights for an openly licensed resource: *Copyright 2018 Lauri Aesoph. This guide is released under a Creative Common Attribution 4.0 International Licence.*
3. If the copyright notice, and statement of rights aren't immediately apparent on a website, look for this information on web pages marked as "Terms and Conditions", "Permissions", etc.
4. If you can't find a copyright notice, statement of rights, or licensing information, don't use the material.
5. Even if a website is labelled as *open*, unless the material is clearly marked with an open-copyright licence or uses a public-domain marking, don't use it.

6. If a resource is in the public domain because its copyright has expired or a work has been designated to the public domain, look for language or a logo that makes this clear. (See [Appendix 1: Licences and Tools](#).)

7. Don't assume that an old image or text found online is in the public domain. It might be a secondary source or someone's interpretation of the original item. For example, a photograph of a centuries-old painting may be copyrighted and have restricted rights.

8. Don't use a resource for which one-time permission has been granted by the creator. (Creative Commons licences permit unlimited usage). Instead, if you find material that you want to use but hasn't been released with an open-copyright licence, contact the creator and ask if they will consider doing so. For more information, see the University of Alberta Libraries' [Asking Permission and Transactional Licences](#) video.

9. Keep track of all external resources added to your open textbook including where and when they were found.

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*For more information, see the [Authoring Open Textbooks chapter on **Managing Assets**](#).*

24.

Resources: Search and Find

Be creative when searching for resources to include in an open textbook

There are literally millions of educational resources — photos, illustrations, videos and film, audio clips, courses, articles, research — that have been released with an open-copyright licence or are in the public domain and available to open textbook authors and publishers. Below are online libraries, projects, directories, repositories, and websites where you will find both individual objects and full resources. If you have difficulty finding what you need, be creative and look for the desired item — photo, graphic, video — in an article from one of the many open academic journals or an open textbook. Another trick is to use several synonyms when searching for a hard-to-find resource.

Many sources contain items that range in user permissions from no copyright (e.g., in the public domain) to CC licences to all rights reserved. Make it your practice to check every resource's licence or permissions before adding it to your open textbook. User rights have been noted beside some of the below sources.

It is recommended avoiding CC licences that include the -ND (NoDerivatives) restriction as content under this licence cannot be changed. See CC BY-ND 4.0 for more information.

Chapter table of contents

- [Creative Commons (CC)](#)
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[Repositories](#)

Canadian collections

- [Canadian Museum of Nature](#): Collection data are available under a CC BY licence. Images are available under a CC BY-NC licence.
- [cIRcle](#): This OER repository is from the University of British Columbia. Each item is individually marked with copyright permissions.
- [Images Canada](#): See [Terms and Conditions](#) for information about usage
- [Library and Archives Canada](#): See [Terms and Conditions](#) for information about usage
- [Open Collections](#): Check each item used in this collection, from the University of British Columbia, as permissions vary

- [Project Gutenberg – Canada](#): Books that are in the public domain in Canada
- [SOL*R (Shareable Online Learning Resources)](#): Higher education and government material from British Columbia and released under CC licences

Mixed collections (open and restricted materials)

Creative Commons (CC)

- [Content Directories](#): A list of organizations and projects released with CC licences
- [CC Search](#): Images from multiple repositories.

Flickr

- [Flickr – advanced search](#): Limit search to CC licensed materials only
- [Flickr: Internet Archive Book Images](#): Check each item for permissions
- [The Commons](#): Found on Flickr in partnership with [The Library of Congress](#). Participants are cultural heritage institutions who share publicly held photography collections. There are "no known copyright restrictions" on the photographs in this collection. See [Rights Statement](#) for more information.

Google

- [Google – advanced search](#): Limit search to CC licensed materials only

Government

Canadian government websites

Most [government of Canada websites and publications](#) are covered by the open government licence. Here is an example of the Statistics Canada data licence

> Source: Statistics Canada, name of product, reference date. Reproduced and distributed on an "as is" basis with the permission of Statistics Canada

However, when using a resource from a Canadian government website or publication, always check the *Terms of Use, Copyright,* or similar page for details.

Often, images and other resources from a Canadian government website stipulates that the reused image or resource not be used for commercial purposes. If this is the case, then add this line to your attribution statement: "This image cannot be used for commercial purposes."

U.S. government websites

Generally, the information and images found on [U.S. government websites](#) are in the public domain.

However, when using a resource from a U.S. government website, always check the *Terms of Use, Copyright,* or similar page for details.

Libraries, museums, and book collections

Also see open academic journals and repositories.

- [British Library](#): Check each item for permissions
- [eBooks and Texts Archive](#): This website lists dozens of collections that contain free academic books, fiction and popular books, children's books, and historical texts. Check each book for permissions before using.
- [Europeana Collections](#): Digital resources of Europe's museums, libraries, archives and audio-visual collections. Rights vary by item. For an overview of this collection, see [Terms and Policies](#).
- [Hathi Trust Digital Library](#): Many items are in the public domain, but some copyrighted items have restricted rights. Check each item before using. The [advanced full-text search](#) allows searching by year of publication.
- [Library and Archives Canada](#): See [Terms and Conditions](#) for information about usage
- [MusOpen](#): Resources for teachers and students such as royalty free music and sheet music
- [National Science Digital Library](#)
- [Petrucci Music Library](#): Public domain music recordings and scores
- [Project Gutenberg](#): Books that are in the public domain in the U.S. or U.S. copyrighted titles, for which the copyright holder has given permission for unlimited non-commercial worldwide use
- [Project Gutenberg – Canada](#): Books that are in the public domain in Canada

Subject-specific collections

Art, culture, and history

- [British Library](#): Check each item for permissions
- [Library and Archives Canada](#): See [Terms and Conditions](#) for information about usage
- [Metropolitan Museum of Art](#): Read the Met's [Open Access Policy](#).
- [Museum of New Zealand](#): Images available for reuse under a CC BY-NC-ND License.
- [New Old Stock](#): Vintage images
- [Old Book Illustrations](#)
- [Public Domain Review](#): An online journal of works from the history of art, literature, and ideas
- [Smithsonian](#): Free Sackler Gallery (images)

- [Viintage](): Vintage graphics in the public domain
- [Wellcome Images](): Images of current and historic human culture

Broadcasting

- [Al Jazeera English](): Quality footage of comprehensive news reports and debate; openly licensed as stated under their [Terms and Conditions]()

Music and audio

- [Audio Archive]()
- [ccMixter]()
- [Creative Commons suggestions]()
- [Free Music Archive]()
- [Free Sound]()
- [Jamendo]()
- Juke Deck (archived)
- [MusOpen](): Royalty free music including sheet music, and resources for teachers and students
- [Open Music Library]()
- Opsound (archived)
- [Petrucci Music Library](): Public domain music recordings and scores
- [SoundCloud]()

Science and health

- [BioMed Central](): Open access biology and medical journals. Figures and graphs in articles are CC licensed and available for reuse.
- [Bioscience Image Library](): From Berkshire Community College
- [Canadian Museum of Nature](): Collection data are available under a CC BY licence. Images are available under a CC BY-NC Licence.
- [Encyclopedia of Life (EOL)]()
- [Morphbank](): Biology images
- [NASA Images]()
- [National Science Digital Library]()
- [PhET interactive simulations](): Math and science simulations from the University of Colorado
- [PLOS]() (Public Library of Science)
- [PubMed Central (PMC) Open-Access Subset](): Search within journals marked with the OA symbol in the "Free Access" column for freely available articles

- [Science Image](#)
- [Wisc Online](#): Images from Wisconsin's Technical Colleges

Type of resource

Audio

See *[Music and Audio](#)*

Courses, lectures, and lessons

- [Open Learning Initiative](#): From Carnegie Mellon University
- [Khan Academy](#)
- [MIT YouTube channel](#)
- [MIT OpenCourseWare (OCW)](#)
- [Open Course Library](#)
- [Open Education Consortium – Courses](#)
- [Open Yale Courses](#)
- [Saylor Academy](#)
- [webcast.berkeley](#): From the University of California, Berkeley
- [Wisc Online: Basic Computer Skills course](#): From Wisconsin's Technical Colleges

Games and interactive simulations

- [PhET interactive simulations](#): Math and science simulations from the University of Colorado
- [Play games](#) and [build games](#): Wisc Online from Wisconsin's Technical Colleges

Images: charts, clip art, graphs, icons, photos, symbols, vector images

- [Bing](#): Photos and videos
- [Doodle Icons](#): Icons in the public domain
- [Foodies Feed](#): Food photos in the public domain
- [Gratisography](#): Photos in the public domain
- [IM Free](#): Photos, vector images, and videos
- [Images Canada](#): See copyright page for info about licences
- [Inkscape](#): Professional vectors graphic editor, open source
- [ISO Republic](#): Photos, vector images, and videos
- [New Old Stock](#): Vintage images

- [Noun Project, The](#): Icons and symbols

- [Old Book Illustrations](#)

- [Open Clip Art Library](#)

- [Picjumbo](#): Photos

- [Picography](#): Photos

- [Pixabay](#): Photos and clip art

- [Public Domain Vectors](#)

- [Startup Stock Photos](#)

- [Superfamous Studios](#): Images

- [Travel Coffee Book](#): Travel photos

- [Unsplash](#): Photos

- [Viintage](#): Vintage graphics in the public domain

- [Wellcome Images](#): Images of current and historic human culture

- [Wikimedia Commons](#): Photos, images, charts, and graphs

- [Wikipedia](#): Look for photos within articles

Maps

- [Open Street Map](#)

Open academic journals

- [Bio Med Central (BMC) journals](#): High quality peer-reviewed journals including broad interest titles such as BMC Biology and BMC Medicine, specialist journals such as Malaria Journal and Microbiome. Check each publication to ensure it's open access.

- [DOAJ (Directory of Open Access Journals)](#): Community-curated online directory that indexes and provides access to high quality, open access, peer-reviewed journals

- [IRRODL (The International Review of Research in Open and Distributed Learning)](#): A refereed, open access e-journal that disseminates original research, theory, and best practice in open and distributed learning worldwide, and based at Athabasca University in Alberta

- [Open Praxis](#): A peer-reviewed open access scholarly journal focusing on research and innovation in open, distance and flexible education. It is published by the [International Council for Open and Distance Education – ICDE](#).

- [PLOS (Public Library of Science)](#): A nonprofit organization with the goal of accelerating progress in science and medicine

- [Public Domain Review](#): An online journal of works from the history of art, literature, and ideas

Videos and film

- [Al Jazeera English](#): Quality footage of comprehensive news reports and debate that are openly licensed as stated under their [Terms and Conditions](#)
- [Bing](#): Photos and videos
- [IM Free](#): Photos, vector images, and videos
- [ISO Republic](#): Photos, vector images, and videos
- [Moving Image Archive](#): Movies, films, and videos
- [TED talks (Technology, Entertainment, Design)](#): These presentations are released with the CC BY-NC-ND Licence
- [Vimeo](#)
- [YouTube](#): Include CC BY when searching for videos. Items with a"Standard YouTube Licence" (covered in their [Terms of Service](#)) are not open. See [YouTube's article on how to add a CC licence to a video](#).

Repositories

- [Bielefeld Academic Search Engine (BASE)](#): Thousands of academic OER in a variety of languages
- [cIRcle](#): This OER repository is from the University of British Columbia. Each item is individually marked with copyright permissions.
- [**Connexions**](#): A repository of open educational resources started by OpenStax where faculty, students, and others can view and share these items
- [**Internet Archive**](#): **Wayback Machine:** A digital archive of the World Wide Web and other information on the Internet. Do not assume that items are in the public domain or openly licensed.
- [**MERLOT** (Multimedia Educational Resource for Learning and Online Teaching)](#): A curated collection of free and open online teaching, learning, and faculty development services contributed and used by an international education community.
- [OAIster database](#): Catalog of millions of OER
- [**OER Commons**](#): A public digital library of open educational resources launched by ISKME — the Institute for the Study of Knowledge Management in Education — in 2007
- [Open DOAR (Directory of Open Access Repositories)](#): Quality-controlled list of academic open access repositories
- Open Education Europa (archived): OER offered in a variety of languages for the European teaching community
- [SOL*R (Shareable Online Learning Resources)](#): Higher education and government material from British Columbia and released under CC licences
- [Wikiversity](#): Learning resources, learning projects, and research

Page added: Feb 20/18 | Last update: Apr 21/22

25.

Resources: Captions and Attributions

When BCcampus Open Education began working with open textbook authors, we soon recognized that devising a standard method of captioning each non-text item in a book was critical. At the same, we were teaching authors the importance of recording the information needed to create a well-structured attribution statement for each open resource they borrowed. It didn't take long to realize that we could use — and shape — a caption's layout to help identify its resource in an attribution statement. In other words, the caption's label could be part of the attribution statement. This chapter describes suggested formats for captions and attribution statements, and how the two can be used together so that the resources in a textbook are clearly marked and legally attributed.

Chapter Table of Contents

- ◦ [Pressbooks: Attribution tool](#)
- ◦ [Open Attribute](#)
- ◦ [OPEN Attribution Builder](#)
- ◦ [Commons Machinery](#)

Captions

A **caption** is text that accompanies a figure, table, or other non-text resource within a work such as an open textbook. At BCcampus, we decided that the caption for each item should only contain the resource type label and number, and a description of the resource. If an item requires an attribution statements, it is placed elsewhere — typically in an "Attributions" list at the end of the chapter.

Separating the attribution statement and caption kept the caption clearn and uncluttered. However, it also introduced a problem: how do we connect an item to its attribution statement? First, we determined that each resource type needed to be identified with a label. We selected "Table" for tables, and "**Figure**" for all images and pictures. That label is combined with a numbering system that incorporates the chapter number the item is found in and the item's places in that chapter in relation to other items with the same label. For example, if a photograph is the third of four figures in Chapter 5, it would be labelled as "Figure 5.3." This resource type and number appears in the caption, and it is used to identify the attribution statement.

Note that the sequence number of a resource label is resource specific. For example, if an item is marked as "Table 6.2," this means it's the second table in Chapter 6, not the second non-text resource. As such, you can have a Table 6.2 and a Figure 6.2 in the same chapter.

The content of a caption is written by the author to convey the significance of the resource and its relationship to text. Referencing the resource in the text body contributes to this connection. Authors are discouraged from using the resource title (assigned to the item by its creator) as a caption because this label is a key component of the item's attribution statement. Using the same phrase as both resource title and caption can cause confusion.

See below for caption examples for the most commonly used resources in an open textbook. Refer to your style guide or make a decision about how you want to style the captions in your textbook and include these details on your book's style sheet. (See [Create a Style Sheet](#).)

Figure captions

Figure 4.3 The green discus fish shown in its natural environment.

Format items to note in this example:

- The resource label (Figure 4.3) indicates that this is the third image in Chapter 4.

- No punctuation (period, comma, or colon) is inserted between the resource label (Figure 4.3) and description (The green discus fish shown in its natural environment).

- A period is placed at the end of the description even though it is an incomplete sentence.

Table captions

Table 2.3: Hotel revenue in British Columbia

Hotel	Annual Revenue ($ millions)
Motel ABC	23.4
Hotel DEF	54.2
Data source: Johnson, 2013	

Format items to note in this example:

- The resource label (Table 2.3) indicates that this is the third table in Chapter 2.

- A colon and one space is used to separate the resource label (Table 2.3) from the description (Hotel revenue in British Columbia).

- No period is placed at the end of the description

- The caption uses sentence case to determine capitalization
- The data used in this table is cited using the label "Data source:" followed by an in-text citation (Johnson, 2013). (See Citation vs. Attribution — Tables: A special case.)

Graph and chart captions

Because graphs, charts, and other data-rich resources where the data is cited are often added images, you can choose to label them as "Figures" or as "Charts" or "Graphs." For example, in the below graph found in Introduction to Sociology, 2nd Canadian Edition, the author has chosen to label it as a figure.
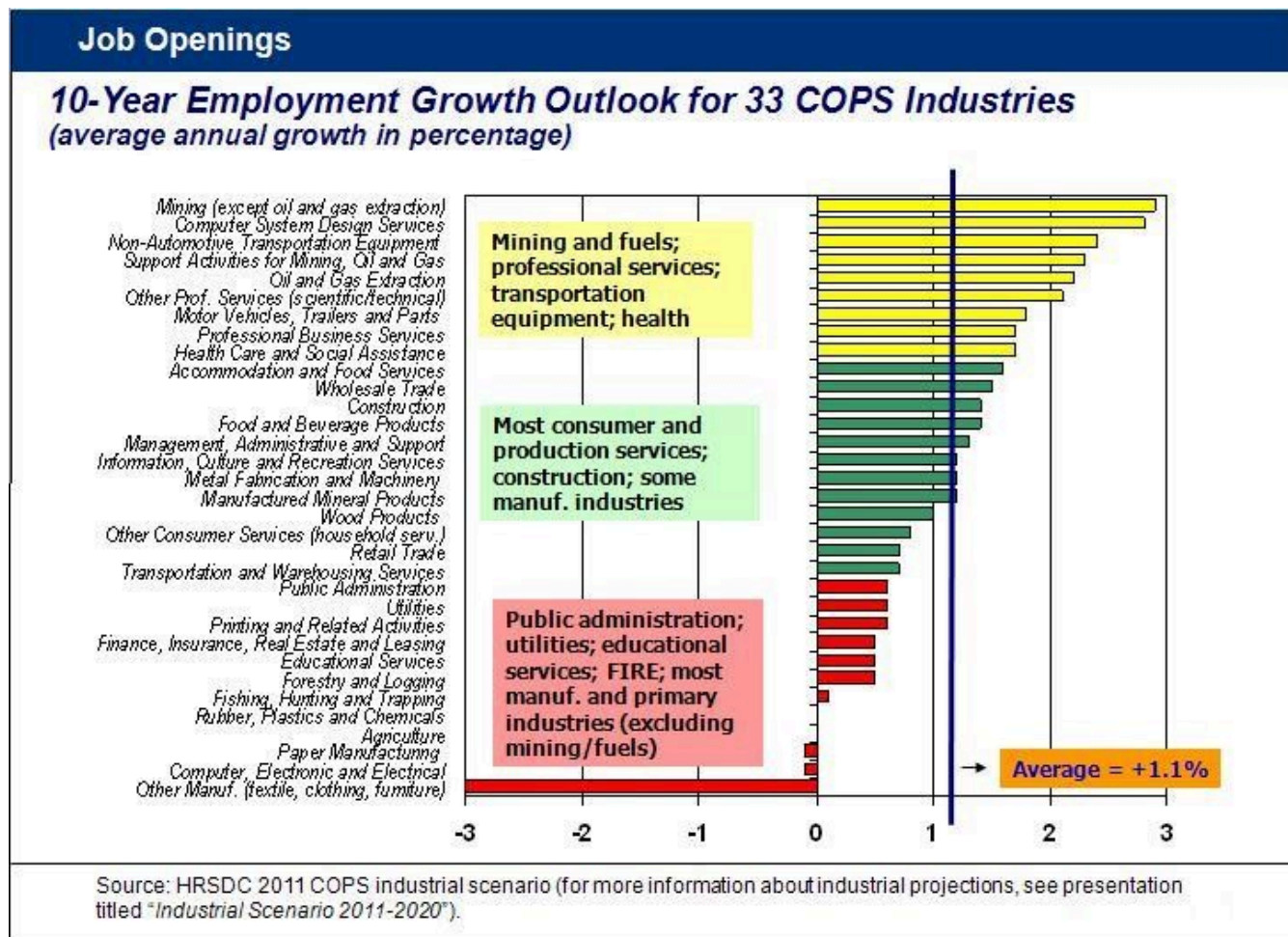

Figure 18.11 The projected growth of several occupational groups

For information on designing images, charts, graphs, and tables for accessibility, see Images, Tables, and Colour Contrast in the BCcampus Open Education *Accessibility Toolkit*.

Attributions

Before looking at the details of how and where to place attributions or attribution statements, let's answer a couple of questions that might influence how you proceed.

Who gets attribution for an image?

It is important to understand *who* to give credit to for an image. Frequently, especially for a work in the public domain, it is not the artist or photographer who created the original work. Instead, you must attribute the individual who created the version of the work that you are using in your book or educational resource. For example, a photograph of a painting is considered a secondary source, or interpretation of the original painting, and you will need to credit the photographer in the attribution statement, not the painter.

Below is a photograph of the famous painting *Mona Lisa*, by Leonardo da Vinci. In the attribution statement, credit is given to the photographer, not da Vinci. As such, the attribution statement should read: *Mona Lisa* by Dcoetzee is in the public domain. This also means that just because a work of art may be in the public domain, it does not mean that the reproduction of that work is in the public domain.

The Mona Lisa is a painting by Leonardo da Vinci. The photograph of this painting was taken by Dcoetzee.

Should items in the public domain be attributed?

Resources for which copyright has been designated to the public domain by the creator do not require that attribution be given to the creator. However, as a best practice, we encourage still crediting the author or artist for the resources they created. Taking this extra step does many things:

1. It shows respect provides recognition for the individual who created and freely shared their creation.

2. It upholds academic integrity.

3. It ensures consistency in how a textbook is styled.

4. It leaves no doubt that the resource is open for use and provides future users with links and

other information about the resource's origins.

Attribution statements

This section provides sample attribution statements based on the most common rights and conditions under which open educational resources are released and used. Note that for resources in the public domain, the attribution statement changes depending on how the work ended up in the public domain. Attribution statements for resources that have been designated to the public domain by their creators are labelled as "Pubic domain: designated." Items in the public domain because their copyright expired are labeled as "Public domain: expired copyright."

Most of these attribution statement layouts are based on recommendations posted by [Creative Commons](#). Here are the commonly used elements and information to be aware of.

- **Resource type + number**. This is the label that you assign to a resource based on its place in your open textbook or OER. It is generally placed in a resource's caption, and it is an effective way connecting a resource to its attribution statement.

- **Resource title**. This is the title assigned to the resource by its creator. An attribution statement should contain the title of the resource with a link to the web page where the resource was found.

- **Creator**. This is the name of the individual who created the resource. An attribution statement should contain the creator's name and (if available) a link to their profile page within the website or repository where the resource was found.

- **Resource change**. If you change a resource, including cropping a photo, this must be indicated in the attribution statement. NOTE: If the CC licence covering a resource includes "ND" (NoDerivatives) as a condition, the item cannot be changed. This includes cropping.

- **Copyright infromation**. A link to a description of the type of licence or other conditions that permit you to use this resource, should be provided as follows:

    ◦ If the open-copyright licence used is a CC licence, link the licence description to the ones provided on the [Creative Commons website](#).

    ◦ If the creator has designated their work to the public domain and marked this work with a Creative Commons zero (CC0) logo or icon, link to the [CC 0 page](#) on the CC website.

    ◦ If an item has been identified as having "no known copyright" with the Creative Commons public domain mark, link to the [Public Domain Mark page](#) on the CC website.

    ◦ If an item is in the public domain and is not marked with a Creative Commons public domain logo or icon, we recommend linking to the [public domain description from Wikipedia](#) instead.

- **Accessibility**. Web accessibility guidelines state that if a link opens in a new tab or window, this should be marked (e.g., [Creative Commons](#)). However, because each attribution statement contains up to three links — and readers are less likely to open these links — it is not necessary or even advised to provide externally opening links for attribution statements.

(See [Links](#) in the BCcampus Open Education *Accessibility Toolkit*.)

Open-copyright licence, no changes

- FORMAT: *Resource type/number + resource title* "by" *creator* "is used under a*" licence type*.
- EXAMPLE: Figure 4.3 [Dallas – Green Discus Fish](#) by [Drriss & Marrionn](#) is used under a [CC BY-NC-SA 2.0 Licence](#).

Open-copyright licence, changes made

- FORMAT: *Resource type/number + resource title* "by" *creator* "has been modified (*resource change*) and is used under a" *licence type*.
- EXAMPLE*:* Figure 4.3 [Dallas – Green Discus Fish](#) by [Drriss & Marrionn](#) has been modified (cropped) and is used under a [CC BY-NC-SA 2.0 Licence](#).

Public domain: designated, no changes

- FORMAT: *Resource type/number + resource title* "by" *creator* "has been designated to the public domain (CC0)."
- EXAMPLE: Figure 5.5 [Meadow](#) by [geralt](#) has been designated to the [public domain (CC0)](#).

Public domain: designated, changes made

It is not required to include a description of a change when using a resource from the public domain. However, you can choose to include this information in your attribution statement.

- FORMAT: *Resource type/number + resource title* "by" *creator* "has been designated to the public domain (CC0). This item has been modified (*resource change*)."
- EXAMPLE: Figure 5.5 [Meadow](#) by [geralt](#) has been designated to the [public domain (CC0)](#). This item has been modified (cropped).

Public domain: expired copyright, no changes

- FORMAT: *Resource type/number + resource title* "by" *creator* "is in the public domain."
- EXAMPLE: Figure 13.1 [Walter Cronkite](#) by [NASA](#)/Bill Ingalls is in the [public domain](#).

Public domain: expired copyright, changes made

It is not required to include a description of a change when using a resource from the public domain. However, you can choose to include this information in your attribution statement.

- FORMAT: *Resource type/number + resource title* "by" *creator* "has been modified (*resource change*) and is in the public domain."
- EXAMPLE: Figure 13.1 [Walter Cronkite](#) by [NASA](#)/Bill Ingalls has been modified (cropped) and is in the [public domain](#).

No known copyright restrictions

- FORMAT: *Resource type/number + resource title* "by" *creator* "has no known copyright restrictions"(*link to web page describing this condition*).
- EXAMPLE: Figure 13.1 C.P.R. Mount Stephen House, Field, BC, 1909 by Musée McCord Museum has no known copyright restrictions.

Government websites and publications

If using images from a government publication or website, see content under the Government heading in the Resources: Search and Find chapter for details about attribution and licences.

Source statement

If available, an optional **source statement** can be appended to the end of an attribution statement. It notes the type of source from which an open educational resource is curated, such as a museum collection, and is used when this information provides legitimacy to the textbook subject matter.

Source statement example: This image is available from the Toronto Public Library under the reference number JRR 1059.

Full attribution statement with source statement: Toronto Rolling Mills is in the public domain. This image is available from the Toronto Public Library under the reference number JRR 1059.

Attribution-statement tools

Attribution statements for resources can be added manually, as described above. However, there are a couple of browser add-ons that can help you capture the correct information for web-based Creative Commons licensed material. If you work with CC material often, take a look at these tools to make attributing content easier.

Pressbooks: Attribution tool

For a description of the attribution tool that can be used in Pressbooks, see Media Attributions in the *Pressbooks Guide*.
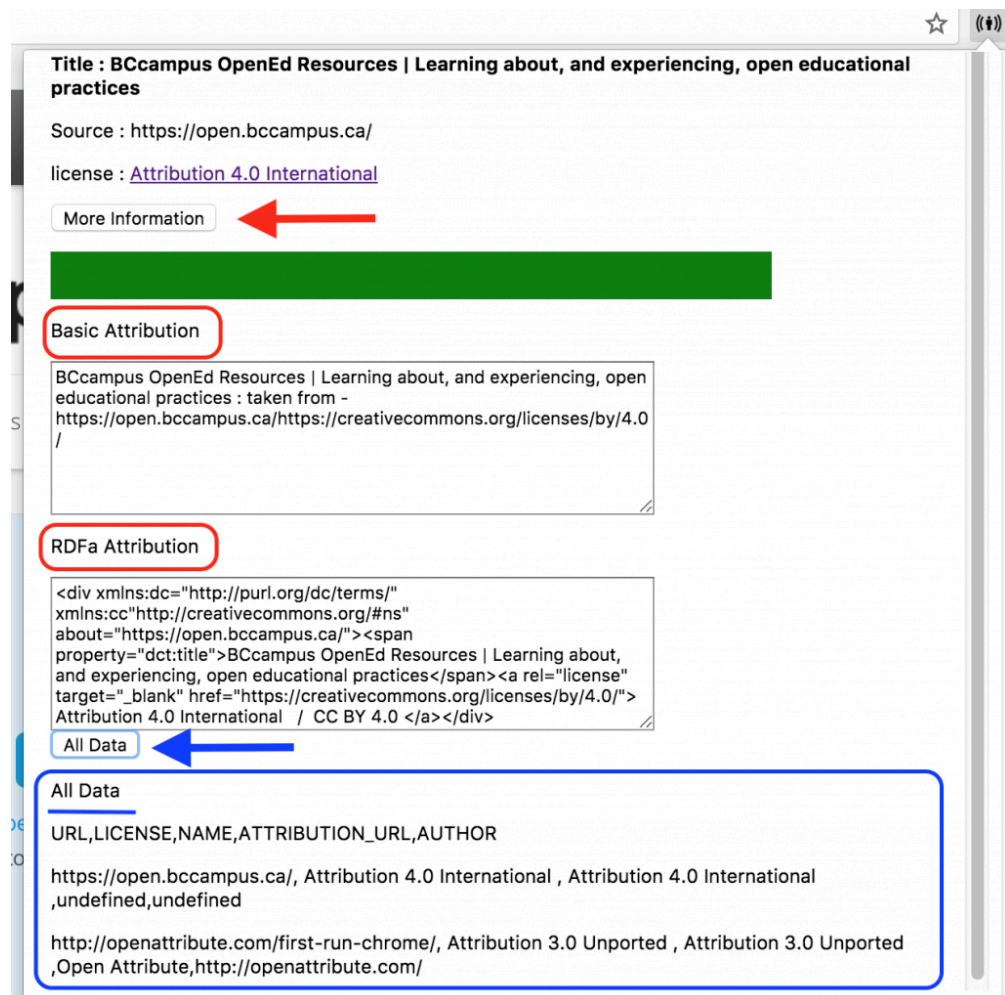
Open Attribute

Open Attribute is a browser add-on/plugin for Firefox and Chrome that gathers the CC licence metadata on a web page and creates an attribution statement. This is how it works.

1. After installing this add-on, a small logo will appear in your address bar (see red arrow) when you go to a website that has CC licensed content on it (and importantly, the correct metadata).
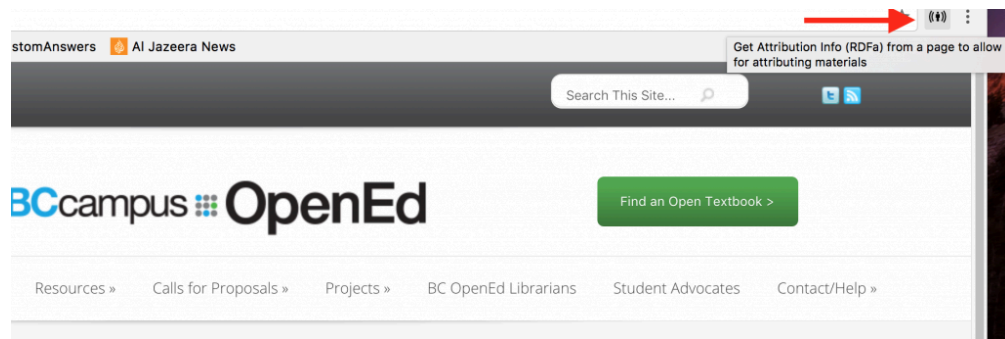
Open Attribute add-on

2. Click on the logo to reveal a textbox with the title, source, and licence of the selected website. When the "More Information" button (by the red arrow) is chosen, both basic (in plain text) and RDFa attribution statements (as HTML) are shown to select and use. The "All Data" button displays all attribution information for the chosen website.

The Open Attribute ad-on can provide both basic and RDFa attributions.

The advantages of this tool are:

- There is no need to go to another web page and manually enter data into text fields.
- It is quick.

- It tracks all of the elements required for a complete attribution.

- It responds to the correct metadata connected with CC licensed content.

- It offers a **Resource Description Framework in Attributes (RDFa)** option, which is a W3C recommendation that adds a set of attribute-level extensions to HTML, XHTML, and other XML documents for embedding rich metadata within web documents.[1]

The disadvantages are:

- You must install the add-on

- If a website does not use CC metadata, this add-on will not work.

OPEN Attribution Builder

This tool was built by the Washington State Board for Community and Technical Colleges and can be found at OPEN Attribution Builder. It is simple to use and provides descriptions of each field through the "?" icon.

OPEN Attribution Builder

The advantages of this tool are:

- It requires no installation

- Licences and versions can be chosen with drop-down menus

- It provides the option to attribute a work that has been changed (adapted)

- Attribution statements available in plain text or HTML

- It creates a well-structured HTML attributions for resources without the correct metadata

1. "RDFa," *Wikipedia,* https://en.wikipedia.org/wiki/RDFa (accessed February 12, 2018).

The disadvantages are:

- It is located on a separate website.

- It doesn't include CC metadata.

Commons Machinery

For a suite of plugins for Firefox and OpenOffice tools — many in beta — visit the Swedish-based website, [Commons Machinery](#). Their attribution-statement tools enable the copying and pasting of images that already have the attribution information attached.

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26.

Embedding and Linking

When an author is unable to find or create a needed video, image, or other item for their open textbook, they often ask if linking or embedding copyrighted material–for which all rights are reserved–is permitted. As a publisher of open textbooks, BCcampus Open Education has developed recommendations on this issue while taking into account the guiding principles and values behind open educational practices and resources.

Linking text

Linking to a website or deep linking to a web page does not require permission from the copyright holder and is not considered copyright infringement. However, linking to a website that obviously violates copyright law, such as one that hosts pirated music or films, should be avoided.

If an author decides to link to restricted material within their open textbook, it is recommended that descriptive text be used for the link so, if taken out of context, the reader knows exactly to what resource they are being redirected. This method also addresses accessibility requirements for linking.

- **Example:** [Information on BCcampus Open Education](#) is available online.

> For more information, see [Links](#) in the *Accessibility Toolkit – 2nd Edition*.

Embedding a video

Embedding–or inline linking–involves adding an embed code to a web source (such as an open textbook) that results an a visual representation–or streaming–of digital content, such as a video, from another web source, such as YouTube or Vimeo. This is a very popular practice because: 1) viewers don't need to access a second website to watch the video and 2) the embedder doesn't sacrifice bandwidth because the video data is stored on the original site.

The question for open textbook authors, however, is: Does embedding violate copyright infringement for videos not released with a CC or open licence?

In his blog post, "Is it legal to embed YouTube videos in a blog post?" Kenny Novak answers this question with a summary of [YouTube's terms](#). He says: "…as long as YouTube's terms permit it, any

YouTube user can embed your content without needing to ask your permission, because you already GAVE them permission simply by uploading your content to YouTube."

All videos shared on YouTube are assigned to one of two licences.

- The Standard YouTube licence is added, by default, to all videos uploaded to YouTube and set the conditions described by Novak above.

- A Creative Commons Attribution (CC BY) licence is also available, but the user must manually make the change from a Standard YouTube licence to the CC BY licence by following these instructions. The CC BY licence lets the video's copyright holder give users advanced permission to copy, change, redistribute, and retain copies of the video.

For more information, see "YouTube" in the Videos, Audio, and Interactive Media chapter of the *Pressbooks Guide*.

Recommendations

For authors who wish to embed videos by other creators in their open textbooks, it is recommended that they:

1. make a best effort to embed *openly-licensed* or *public domain* videos

    - if it's uncertain whether or not video is open, follow steps laid out in Resources: Only the Open

2. embed videos from video-sharing websites for which:

    - the Terms of Service clearly indicate this action is permitted

    - copyright holders can remove their videos in cases of copyright infringement

3. provide proper attribution

If an author or publisher decides to embed a restricted video in an open textbook, it is recommended that this information and a link to the original content are clearly indicated out in the attribution statement.

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27.

Screenshots of Software

If you want to use a screenshot of software for an openly licensed work, as a general rule check the terms of a website, as they may spell out the rules of how to use screenshots of their products. Many companies are okay with using screenshots of their software or products for training. There are many "how to" websites that use screenshots, as there is a financial incentive for companies to have training material created for them by others. (The more people who learn to use their product, the better.)

Follow a company's guidelines if you want to include screenshots of their software product

If the software is open source or released under a free software licence, it is usually fine to use screenshots.

Microsoft spells out how you can use screenshots of their products as follows:

- You *may not use* screen shots of Microsoft product boot-up screens, opening screens, "splash screens," or screens from beta release products or other products that have not been commercially released.

- You *may use* other screen shots in advertising, in documentation (including educational brochures), in tutorial books, in videos, or on websites, provided that, in addition to the requirements above, you:
    - Do not alter the screen shot except to resize it.
    - Do not use portions of screen shots.
    - Do not include screen shots in your product user interface.
    - Do not use screen shots that contain third-party content.

- ◦ Do not use screen shots that contain an image of an identifiable individual.[1]

Google allows the use of screenshots of their products. For more information, see Google's Using Product Graphics page.

Others, require that you ask permission. For example, see Yahoo's Permissions page.

Bottom line: Check a software's website for *terms of use* before using screenshots of its products.

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Attributions

Software by geralt has been designated to the public domain (CC0).

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1. "Use of Microsoft Copyrighted Content," *Microsoft,* https://www.microsoft.com/en-us/legal/intellectualproperty/permissions (accessed February 1, 2018).

28.

Fix as You Go

*Dedicating one or more people to the role of fixer
will result in a higher quality textbook*

During production, it's a good idea to have — in addition to a copy editor — someone who oversees the layout, formatting, and correct treatment of the various elements of your book.

This is your **fixer**.

At BCcampus, we found a good fixer to be invaluable. Through experience, we learned they should be an individual with a keen eye for detail, have the ability to accurately match the exceptions noted on the style sheet against the textbook, be willing to review each chapter and section of your book repeatedly, and be able to distinguish between errors they should correct as part of their job and problems that require input from the author or project lead.

A fixer can also help add elements to the textbook, such as learning-objective textboxes and attribution statements.

Lastly, you and your fixer will learn as you go. The fixer will be spending a lot of time with the textbook, and because of this, they can offer many helpful suggestions about what's working, what isn't, and where the problems are.

Fixer tasks

Before they begin, create a detailed job description for the fixer or fixers so it's clear what's expected. Keep a running "fix list" to record both anticipated and discovered errors and inconsistencies, and note

details regarding each correction, including what was fixed, the date completed, and who did the job (if there is more one person involved).

The fixer does not copy edit. However, if the fixer notices problems with the language — such as grammar, unclear text, repetitive phrases — they can report these to the copy editor or author.

Typical fixer tasks might include:

- Auditing external resources (images, videos, audio clips) to ensure they meet licensing requirements
- Ensuring that all images, videos, and other external resources added are correctly attributed. The fixer can also be assigned to adding attribution statements. (See Resources: Captions and Attributions.)
- Making sure that figures and tables are correctly captioned, numbered, and referenced in the text
- Comparing key terms highlighted in the textbook against the glossary
- Confirming that links works
- Reviewing the citation style of in-text references or footnotes and the reference list
- Checking the heading styles are correct
- Depending on the country in which a textbook is published, the fixer might be instructed to:
  - change measurements (e.g., from imperial to metric)
  - ensure Canadian spelling is used. (See Appendix 3: Canadian Spelling and Word List.)

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V

Edit and Review

Section Topics

This section includes:
 	
      ◦ [Peer Review](#)
      ◦ [How to Copy Edit](#)
      ◦ [How to Proofread](#)
      ◦ [Guideline for Copy Editors](#)

29.

Peer Review

Look to your peers for feedback as you write

Inviting a colleague to contribute by writing a section or chapter to your textbook on a subject for which they are the expert is one way to ensure quality information in your open textbook. Another is to ask colleagues to serve as **subject-matter experts (SME)** and conduct a **peer review** — literally a review by a peer — of your work before it goes to copy editing. (Consider using one of your Contributing Authors.)

Like other textbook tasks, providing your SME with clear expectations will make this phase of the writing project smoother. It will also save your SME time and you frustration. Here are some suggestions.

- Only give the SME text that needs their input, not the whole textbook (unless it helps with the assessment).

- Identify the course level and subject matter for which the textbook is intended.

- Use a rubric that informs the SME about required feedback. (See the BCcampus Open Education Review Rubric posted below for ideas.)

- Clarify that you are seeking the SME's expertise on the *content*, but do not need help with grammar, spelling, layout, or other aspects of the textbook.

- Give the SME adequate time to conduct the review and set a deadline.

SME Rubric

Use the following questions to help steer feedback and make sure all areas are covered.

1. What information is inaccurate? Please offer corrections.

2. Is there any information missing? Please provide a list.

3. Are there learning objects that could be used to enhance the information, such as case studies, historical examples, graphs, tables, and images?

4. Do you have a list of suggested readings for students?

5. Can you suggest study questions or exercises that will help the student learn this information?

Here is the BCcampus Open Education Review Rubric:

- Review Rubric [Word file]

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Open Education Network

*For more information, see the Authoring Open Textbooks chapter on **Peer Review**.*

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30.

How to Copy Edit

Copy editors add an important element to the creation or revision of a textbook. When they copy edit, these individuals provide an objective set of eyes that ensures grammar and spelling are correct, the established style for a textbook is followed (see Appendix 2: Style Guide), and the book's language is suitable and understandable to the readers. Skipping this stage lowers the quality of the textbook.

It is recommended that trained copy editors be used for this phase. An author should never copy edit their own work. BCcampus Open Education used both independent copy editors and editors from an author's university or college. It was interesting to observe how the copy editors' work influenced textbook writing and production. For example, because a copy editor is not the subject-matter expert, they read a textbook like a student might, and quickly notice when information is missing or concepts are unclear. However, unlike a student, a copy editor has the skill to help an author rewrite a passage. Authors were happy to receive this feedback because they learned to present their material more effectively.

Make a plan

Like is done for other parts of your textbook's timeline, it is important to clearly spell out the expectations for and schedule of the copy editor before this work begins. While the copy editor brings essential expertise to the writing process, it is the author-publisher's or project coordinator's responsibility to guide that expertise. (See Project Timeline.)

Make a plan with your copy editors

Here are some items that should be addressed.

1. Determine who will be the copy editor's key contact. If someone other than the author-publisher is coordinating the project, then allow the copy editor to communicate with this individual.

2. Clarify which style guide and other editing/styling references will be used by the copy editor. Instruct that a style sheet should be created and maintained; review the details of this document with the copy editor. (See Create a Style Sheet and Appendix 2: Style Guide.)

3. If an authoring platform or software is being used, allow the copy editor to make grammatical, spelling, and styling changes directly in the system to save time. Trust the copy editor's authority in this area. If the copy editor notices problems with styling that are difficult to fix, or repeat throughout the book, assign the correction to someone other than the author, such as the fixer. (See Fix as You Go.)

4. If the copy editor is new to the technology being used, provide training. (See Technology: Accounts and Training.)

5. Develop a copy-editing schedule. At BCcampus, we learned that copy editing chapters as they are completed is most effective. This tactic saves time for both the author and production team because problems are identified and corrected early.

6. Define the copy editor's role. For example, you might require that the copy editor check all grammar and spelling, in addition to scanning text for overall consistency, clarity, and style. If assessing content for accuracy and integrity will be the responsibility of the subject-matter expert, inform the copy editor. Include these points in the copy editor's contract. (See Peer Review and Appendix 4: Contracts.)

7. Determine which sections and elements of the textbook should be copy edited. Careful copy editing is time consuming (and potentially expensive) so if there are items that will be reviewed by other parties, tell your copy editor. Consider assigning the following to one of your support team members:
   1. in-text citations and the accompanying reference list
   2. figure and table captions
      1. non-Canadian spellings often cannot be corrected in text that is part of an image, graph, chart, or other figure taken from an external resource. Therefore, if spelling is important, use Canadian repositories when possible.
   3. figure and table numbering (are they in sequential order, consistent, and complete?)
   4. attribution statements (are they present for all resources? Is the format correct?)
   5. check links and fix those that are dead or open on the wrong web page
      1. archived web pages found in the **Internet Archive: Wayback Machine** can be used for dead links

8. If the textbook is an adaptation of an existing book, decide if the unchanged original text and other elements of the book should be copy edited in addition to the new/changed text by the adapting author. This might be done:
   1. even if the original text has been copy edited to ensure that the new/changed text is

consistent with the adapted work

    2. if the original text was not copy edited or poorly copy edited

9. Ask the copy editor to keep a list of items that should be reviewed by the author such as:

    1. text that requires a significant rewrite

    2. subject-related questions

Authors should not make changes to textbook chapters once they have been copy edited as this can undo the copy editor's work.

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31.

How to Proofread

Proofreading is worth the extra time

As tempting as it might be, the **proofreading** phase should not be skipped as it's the last opportunity to mold your textbook into a work that contains coherent writing, consistent styling and layout, and correct grammar and spelling. Perfection is the unattainable goal.

(It's been said there's less pressure to create a "perfect"product when creating an open textbook because it can easily be corrected later. However, relaxing standards can give potential adopters a bad impression of your book and even lead to poor-quality book.)

A trained copy editor typically acts as the proofreader, but the proofreader ideally should not be the same individual who copy edited the textbook. In addition, as was stated in the previous chapter, the proofer should not be the author.

Make a plan

Well in advance of this latter stage, think about and discuss with the proofreader what the requirements will be, and provide them with a clear plan. Many of the same items noted in the How to Copy Edit chapter can be referenced in addition to the items listed below.

1. How many times should the textbook be proofread? Proofreading is typically an iterative process whereby a manuscript is scanned one or more times until it is error free — or as close to error free as is humanly possible. However, if time and budget are a concern, it might be decided to enlist only one or two rounds of proofreading.

2. Provide the proofreader with the most recent version of the style sheet and style guides as references. (See Create a Style Sheet and Appendix 2: Style Guide.)

3. Some proofreaders report that it's easier to identify errors on the printed page. If the textbook

has been written in an online system, clarify if this is the proofreader's preferred manner of working, and whether there is time and money to accommodate this extra step. (Corrections made on the printed page must be entered into the digital version of the book by either the proofreader or someone else. If not the proofreader, make sure the chosen individual is highly skilled in detail work.)

Authors should not make changes to textbook chapters once they have been proofread as this can undo the proofreader's work.

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32.

Guideline for Copy Editors

Advice for and from copy editors

While the basic rules of copy editing apply whether working on a traditional or open textbook, there are some differences. The below guidelines are for (and reviewed by) professional copy editors.

1. Writing and editing a web-based textbook will likely occur in an online platform such as Pressbooks. Therefore, it's important that editors, authors, and other participating parties agree to and understand how changes in the textbook and platform will be made.

    1. Using an annotation tool such as **hypothes.is** can be helpful when the copy editor wants to highlight and comment on problems that should not or cannot be changed without instruction.

2. Like print books, starting with a standard style guide is important. As the project progresses, be sure to record styling exceptions for the textbook on a style sheet. You might find that an openly licensed textbook has special requirements such as ensuring that all images are properly licensed and correctly attributed. (See Appendix 2: Style Guide.)

3. Be sure that the copy editor is familiar with or receives training for editing web-based textbooks in the online platform.

4. A web-based textbook will likely include live links (in the body and possibly in the reference list), and multimedia. Decide at the outset of your textbook project what the copy editor is responsible for checking.

5. A web-based textbook, online platform, and other technical elements introduce additional challenges. Clarify at the beginning of an editing project:

    1. if the copy editor should report technical problems in the textbook

    2. to whom the copy editor should report technical problems relating to accessing or using the online platform or textbook

    3. who is responsible for fixing technical problems (the author, the project manager, or the managing editor)

6. Clarify, at the beginning of an editing project, who will receive the copy editor's editing notes and how issues will be addressed. Determine if the copy editor will contact the author directly or through an intermediary, such as a project manager.

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VI

Pre-publication

Section Topics

This section includes:
 	
    • The Final Check
    • Textbook Cover
    • Editable Files
    • Remove Platform Access
    • Textbook Citation
    • Communications
    • Print-on-Demand Copies

33.

The Final Check

We learned that after a textbook was proofread, it's a good idea to conduct one last review. This task should be done by someone with an eye for detail — such as the fixer or copy editor. (See Fix as You Go and How to Copy Edit.) That way, if they are required to make corrections, it won't disrupt the completed copy editing and proofreading. (Needless to say, the style sheet and style guide should be referenced during this work.) For ideal results, give the assigned individual a few days to a week away from the textbook before they begin. This break allows the checker to clear their head for better concentration.

Like other phases of production, establish the scope of this final check. The amount of time available and length and complexity of the textbook will help shape this plan. Though, as is true for many aspects of textbook production, this final check can feel like it is never finished.

If you're uncertain about what or how much of the textbook to review, prioritize the items on your list and let the allotted time determine what you will focus on. For example, you might decide that it's most important to double check the layout of the book, such as its learning objectives, exercises, and key takeaways. This then becomes the first task. Your next priority might be the legality of the resources added to your textbook. So, you ask the checker to review all items borrowed from external sources, such as photos and graphs, and confirm that they do in fact hold an open-copyright licence or are in the public domain. (See Copyright and Open Licences and Resources: Only the Open.) The third item, time permitting, could be revisiting sections where mistakes are easily overlooked, such as citations and attribution statements.

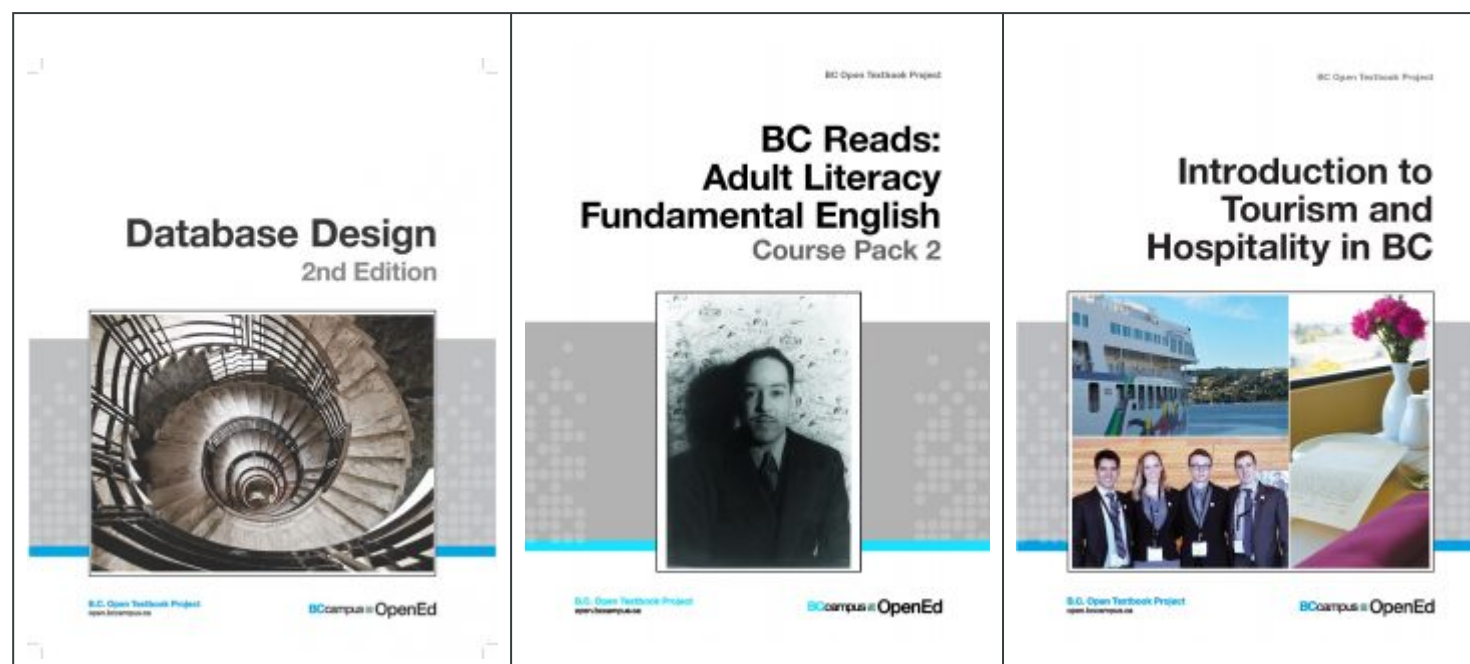> **Bottom line**: Checking *some* of your work is better than checking *none* of your work.

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34.

Textbook Cover

A professional looking cover helps ensure a good first impression for your open textbook, so we advise that you use the services of a professional, such a graphic designer, for this task. Covers for textbooks published for the BCcampus collection rely on a template devised by our marketing department. Above are three examples. The art for *Database Design, 2nd Edition* was selected with guidance from our project team; the photo for *BC Reads: Adult Literacy Fundamental English, Course Pack 2*, was chosen by the textbook's author, and the collage of photos used for *Introduction to Tourism and Hospitality in BC* was a collective decision made by the team of writers behind this book.

If you're working with an academic press or your organization's publishing department, they might create a textbook cover for you. If not, then see the Open Textbook Cover Toolkit found in the *Print-on-Demand Guide*.

Incorporate the creation of the textbook cover into the project's timeline and allow time to review the cover's draft and to make changes if needed. (See Project Charter and Timeline.) Provide clear instructions to the designer about information the cover should contain. This includes items such as:

- Textbook title
- Subtitle

- Edition number and type (if relevant)
- Author(s) or editor
- Name of institution sponsor or funder
- Attribution statement for cover art

Cover art

If you decide to include an image on the cover, you can use an original photo or artwork or search for an image in one of the many repositories containing items that have been released with an open-copyright licence. (See [Resources: Search and Find](#).) Take these steps for best results.

1. Check the permissions and/or licence of the image. (See [Resources: Only the Open](#).)

2. Find as large and high quality of an image as you can (preferably 300 DPI 7×5 inches or 2250×1500 pixels at 300dpi) for optimal resolution and clarity in both the digital and print version of your textbook. If you provide a PDF of your textbook for download and file size is a concern, use a smaller file.

3. If you're undecided about cover art, consider an abstract, even generic, photo or illustration that conveys the theme of your book rather than a specific image. Colour often works better than black and white.

4. If the image is taken from an external source, record the following information for the attribution statement:

   1. name of the image and its link
   2. name of the creator and a link (if available) to the creator's home page in the repository used
   3. the licence or permission type, or if it is in the public domain

Sample Cover Requirements

Dennis Kong is the Solutions Consultant at Simon Fraser University's Document Solutions department, which provides print-on-demand copies for the B.C. Open Textbook Collection. He provided the following specifications to keep in mind when creating textbook covers:

- 8.5×11 inches for the printable area with a one-eighth-inch (minimum) bleed all around (8.625 x 11.125)
- Colours should be CMYK (cyan, magenta, yellow, and black) if possible
- Resolution should be at 300 DPI (especially for images)
- Avoid using unusual fonts. If necessary, convert the fonts to outlines or convert to an image
- Avoid having any text (or critical design elements) located less than a half-inch from any edge

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Attributions

[BCcampus Open Education website](#) (screenshots) are used under a [CC BY 4.0 International Licence](#).

35.

Editable Files

Editable files are the digital files generated for an open textbook, or other open educational resource, that can be easily changed or edited. Editable files allow faculty, students, and others using your book to put into practice all permissions granted by an open-copyright licence, especially the rights to revise and remix, as described in David Wiley's 5Rs framework.

Editable files allow for easier changes to an open textbook

Which files are editable

Most files can be edited, but the task isn't always simple. To determine whether a file is suitable for editing, one must ask these questions:

- How easy or difficult is the file to edit? Does it require more than one or two steps?
- Is additional technology required to edit the file?
- Was the file type designed with editing in mind?

Text documents are the most editable file type because changes can be made directly to the file's native format, and the task does not require additional steps or technology.[1] Examples of text document files are OpenOffice (ODT) and Microsoft Word (DOCX).

xHTML and **XML** files are designed for interoperability, i.e. the transfer of information from one source to another. xHTML (Extensible Hypertext Markup Language) is a member of the XML family and acts as an extended and stricter version of the broadly used **HTML** (Hypertext Markup Language).[2] Editing

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1. "Choosing the Right File Format/Text Documents," *Wikibooks*, last revised July 26, 2017, https://en.wikibooks.org/wiki/Choosing_The_Right_File_Format/Text_Documents (accessed August 17, 2017). This information is used under a CC BY-SA 3.0 licence.
2. "HTML," *Wikipedia*, last revised August 12, 2017, https://en.wikipedia.org/wiki/HTML (accessed August 17, 2017), and "XHTML," *Wikipedia*, last revised April 24, 2017, https://en.wikipedia.org/wiki/XHTML (accessed August 17, 2017). This information is used under a CC BY-SA 3.0 licence.

these types of files is typically a two-step process whereby the second step involves transferring the file to a system that allows editing of the file. HTML files can work in certain platforms including WordPress if an [HTML Import plugin](#) is used.

EPUB files are designed for portability. These files can be read by most eReader devices and software. The point of these files is not to provide editing capability, but to deliver a comprehensive package that contains all elements of a book including text and images — like a zipped package — to a device for reading offline. However, Pressbooks does accept an EPUB file so that it too can be edited once added to this platform. Like the xHTML and XML files, editing using an EPUB file is a two-step process.

A **PDF** file (Portable Document Text) can be edited with the right software, such as Adobe Acrobat PDF Editor, but doing so is not ideal. The PDF format was designed to represent documents not create or change them.[3]

If you are working in Pressbooks, see [How to Export Different File Types from a Textbook](#) in the BCcampus Open Education *Pressbooks Guide.*

Beyond text

In addition to providing editable files for the textbook, authors should also consider offering editable files for media included in their textbook or as supplemental OER, such as images, audio clips and video files, and the transcripts that accompany these media. Some questions to ask when doing this are:

- Is the format open or proprietary?
- Is the format built for viewing or for portability between operating systems?
- How simple is the format to use?
- How well does it integrate with other technologies such as Pressbooks and LMSs (Learning Management Systems, e.g., Moodle, Blackboard, Canvas, Desire2Learn)?
- How compatible is the format with online devices?
- Will the format allow editing? If so, how easy or difficult is this to do?

File types and accessibility

Josie Gray

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3. "PDF Reference, sixth edition: Adobe Portable Document Format version 1.7," *Adobe Systems Incorporated*, November 2006, http://www.adobe.com/content/dam/Adobe/en/devnet/acrobat/pdfs/pdf_reference_1-7.pdf (accessed August 17, 2017).

One of Josie Gray's tasks as Open Education Production Assistant with BCcampus is to review open textbooks for accessibility and edit them so they meet [Web Content Accessibility Guidelines](#) (WCAG). She says that some file types work with some assistive technologies better than others and that having multiple file types available allows students to select the format that works best for them and their learning style.

For example, EPUB and MOBI files work best for people who want to access content through their phone or tablet offline, as the text and content will adjust to fit the screen. While PDFs are the easiest file type to open and use, they don't work well with mobile devices, screen readers, or text-to-speech technology. Instead, students using screen readers will likely use the web version of the book.

Alternatively, people who need a larger text size may choose to use a PDF or the web version, as both formats make it easy to enlarge the text size.

Print copies of a book are important for people who prefer learning from print materials. In addition, they are the best option for people who are not comfortable with computers or don't have a reliable Internet access. (See [Print-on-Demand Copies](#).)

For more information on accessibility in open textbooks, see the BCcampus Open Education [Accessibility Toolkit](#).

Audio files

Audio files embedded into the web version of a textbook or offered as a stand-alone resource for a printed book can assist students who are visually impaired or those with a learning disability, as they can listen while reading along. Each of the twenty-three open textbooks in the [Common Core Trades series](#) includes an audio file in addition to the textbook. For adults learning to read, audio clips of short stories from the accompanying text are embedded throughout the [B.C. Reads: Adult Literacy Fundamental English, Course Pack 1](#).

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Attributions

1. *Can changes be made?:* [I tend to scribble a lot](#) by [Nic McPhee](#) used under a [CC BY-SA 2.0 License](#).
2. Some of this text is from [Finding the Key to Open](#) by Lauri Aesoph and is used under a [CC BY 4.0 International Licence](#).

36.

Remove Platform Access

If you have used an online system or platform to write the textbook, remove access for all individuals who have accounts — including copy editors and fixers — before publication so no changes will be made unexpectedly or unintentionally.

Only those who will be responsible for monitoring and maintaining the textbook, such as the author, should retain access to the editing platform.

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37.

Textbook Citation

The open-copyright licence applied to an open textbook, or the book's designation to the public domain, legally precludes the need to cite the book in a scholarly work or homework assignment, as long as an attribution statement is provided. (See Citation vs. Attribution.) Still, scholars and students may want to cite your work in an effort to recognize your effort and expertise, and in keeping with the practice of academic integrity.

> Though not legally required, it is the practice of BCcampus Open Education to credit authors of textbooks in the public domain as a gesture of academic courtesy.

Citing an open textbook is like citing any online textbook. Therefore, as the author and publisher of an open textbook, it is your job to provide the elements required for a complete reference, regardless of citation style, such as: textbook title, author(s) or editor(s), copyright year, and publisher name and place. It is also helpful for readers to see a citation example or two in different citation styles.
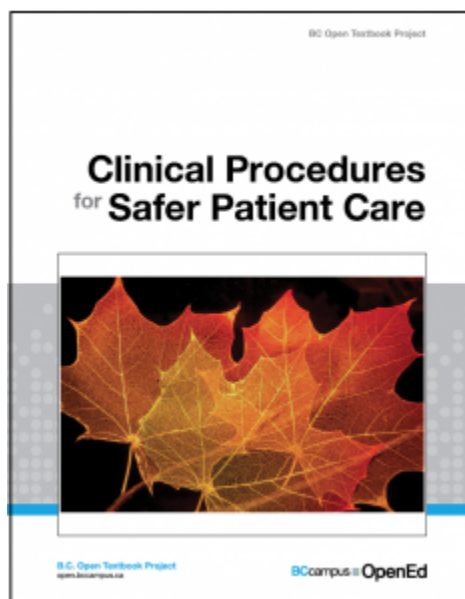
Clinical Procedures for Safer Patient Care cover

Here are some sample citations for a BCcampus open textbook:

APA: Doyle, G. R., & McCutcheon, J. A. (2015). *Clinical Procedures for Safer Patient Care.* Victoria, BC: BCcampus. Retrieved from https://opentextbc.ca/introductiontosociology2ndedition/.

Chicago: Doyle, Glynda and Jodie McCutcheon. *Clinical Procedures for Safer Patient Care.* Victoria, BC: BCcampus, 2015. https://opentextbc.ca/introductiontosociology2ndedition/.

MLA: Doyle, Glynda Rees and Jodie Anita McCutcheon. *Clinical Procedures for Safer Patient Care.* BCcampus, 2015, https://opentextbc.ca/clinicalskills/. Accessed 27 Oct. 2017.

Most university and college libraries provide examples of how to cite online books, such as the Citation Style Guides from Thompson Rivers University.

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Attributions

BCcampus Open Education website (screenshot) is used under a CC BY 4.0 International Licence.

38.

Communications

Once you've completed your textbook, it's time to let everyone know. Here are some ideas about how and where to spread the word. As you do this, remember to keep track of where your textbook is posted as you'll want to keep all contacts and collections informed when changes or corrections are made to the book.

Home institution and colleagues

Authors who are faculty members or instructors at a college, institute, or university have a ready-made community that can help promote a new textbook. Here are someways you can make use of your institutional networks:

- Use email and mailing lists to inform colleagues, as well as the dean and/or department chair of your faculty

- Contact the communications and marketing department of your home institution and ask if they will write an article about your book in their next newsletter

- Ask librarians at your institution if your book can be added to the library catalogue. These steps might help:

    ◦ provide a link to the web version of your book

    ◦ point out all available file formats such as PDF, EPUB, and MOBI

    ◦ donate one or more print copies to the library's collection for faculty and students who prefer a hard copy

    ◦ show librarians where editable files can be downloaded for faculty who want to revise your book for their course

- Inform your institution's bookstore manager. Many bookstores appreciate knowing about newly available open textbooks, particularly those that will be used in the classroom, so they can inform students.

- Notify your professional association and related organizations.

Projects and organizations

Ask open textbook projects and OER organizations to spread the word about your book. It is common practice for these groups to monitor communication channels for new open textbooks so they can let their networks know. Below are a number of OER organizations in Canada in the United States. In

addition, you can reach out to open-education organizations in English-speaking countries outside of North America, such as the United Kingdom, Australia, New Zealand, and South Africa.

Canada

- [BCcampus Open Education](#)
- [Campus Manitoba](#) (OpenEd Manitoba)
- [ecampus Ontario](#)
- [Canadian Open Education Initiatives](#)

United States

- [Open Washington](#)
- [Open Oregon Educational Resources](#)
- [Open SUNY OER Services](#)
- [CCCOER](#)
- [Affordable Learning Georgia](#)
- [Open Textbook Library](#) (part of the Open Textbook Network)

Repository applications

Many open textbook collections allow authors to submit requests for their book to be included. Some repositories require that a new textbook meet certain criteria, such as an evaluation by a subject-matter expert. Here are a few examples of where you can apply:

- [BCcampus Open Education: Suggestion for the Collection](#)
- [MERLOT: Add to Collection](#). (You will need to create an account to submit.)
- [OER Commons: Submit a Resource](#). (You will need to create an account to submit.)
- [Open Textbook Library: Submit an Open Textbook](#)

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*For more information, see the [Authoring Open Textbooks chapter on **Where to Share**](#).*

39.

Print-on-Demand Copies

Make arrangements for **print-on-demand** copies of your textbook to be available either through your college or university bookstore, student services, Amazon or other print-on-demand or self-publishing service. Print-on-demand services are helpful for students or instructors who prefer to work with a physical, bound version of your textbook.

BCcampus Open Education provides this service — in conjunction with Simon Fraser University's Document Solutions department — for all open textbooks in our collection, indicated with a "Buy a print copy" button on the book's record page.

You can buy a black-and-white print copy of British Columbia in a Global Context for $7.20.

It is expected that printed copies of an open textbook will cost money. However, prices are typically set for cost recovery only.

The price for an open textbook varies depends on:

- Number of pages

- Black and white vs. colour

- Softcover or hardcover

- Shipping and handling costs

If you set up a print-on-demand option for your textbook, it is best for readers to use a service in your country. If you elect to provide a service outside your country, make this clear to your readers as they will have to contend with a different currency, and duties and fees related to customs and processing. BCcampus learned this lesson when its open-textbook readers complained about American-only options to purchase textbooks. Our solution was to provide a Canadian-based supplier for all our books and, when a U.S. print-on-demand option is also available, to clearly label it.

For more information, see the BCcampus Open Education *Print-on-Demand Guide*.

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VII

Post-publication

Section Topics

This section includes:
 	
    • [Maintain the Book](#)
    • [Track Adoptions](#)
    • [Textbook Reviews](#)

40.

Maintain the Book

Another flaw in the human character is that everybody wants to build and nobody wants to do maintenance.

-Kurt Vonnegut[1]

It can be said — or is assumed — that a textbook released with an open-copyright licence is maintained by the community that uses it. However, the reality is that many open textbooks aren't changed — at least the original versions — once they've been published. Instructors who adopt an open textbook might customize it for their own use and maintain a private copy, but the community may or may not benefit from these improvements.

Textbooks that have an individual or organization that takes responsibility for its ongoing quality and viability tend to experience the highest adoption rates. At BCcampus Open Education, we have learned that the most successful textbooks are the ones with authors that take an active interest in their maintenance by paying attention to errors, noting potential improvements, and promoting their book amongst colleagues.

The first step when creating your post-publication plan is to layout how your completed book will be maintained. This involves setting up ways to receive and record feedback, fixing reported errors, and planning for revisions and new editions. There is a lot to keep track of, so setting up a schedule can be helpful.

Feedback

Invite feedback from your readers

Give your readers a way to offer feedback about your textbook. Some authors do this by adding a line to

1. "Kurt Vonnegut Quotes," *Goodreads,* https://www.goodreads.com/quotes/276615-another-flaw-in-the-human-character-is-that-everybody-wants
   (accessed August 11, 2017).

the preface or introduction that invites suggestions. You can provide your contact information such as an email or create a feedback page can be added to the front or back section of the textbook. This feedback page should contain details about the kind of feedback you're looking for and how the reader can submit comments.

If the textbook is housed in an online platform that doesn't use page numbers, it can be difficult for readers to clearly describe what section of the text they want to comment on. In your call for feedback, encourage readers to be as specific as possible in their description of the location of their comments. Alternatively, some online platforms have a comments feature that can be enabled. Another option would be to use an external (and open source) annotation system, such as Hypothes.is, which allows users to leave comments directly on a web page.

Think about how you will process feedback. The treatment for each item will depend on what has been reported: an error, new information, a potential resource to add, or suggestion on the structure of the textbook. It is also good practice to respond to recommendations by thanking your colleague for taking the time to write to you. If you have information about how to use your textbook or ideas about supplemental materials, include these in your response.

Another way to collect feedback on your textbook is to give instructors the opportunity to submit a review of your textbook. (See Textbook Reviews.)

Errors

Regardless of how carefully a book is copy edited and proofread, it will probably contain errors after publication. Your job is to accept this fact, create a system that allows readers to report errors to you, and develop a means to correct these errors. BCcampus Open Education uses a Report an Error form.A feedback form that invites error reporting might be sufficient for you, or you can just provide an email where people can contact you.

Think about who will make the corrections. This can be you or someone else, like a student assistant or copy editor. This will often depend on who has access to the book's source files after publication. (See Remove Platform Access.) Also, how often will corrections be made? Will you fix them immediately? Monthly? Quarterly? And how will you respond to the individual reporting the mistake? A simple thank you with a description of how and when the error will be addressed is one way.

Develop a means to track and record corrected errors for your readers' reference. You can use an **erratum** — a record of errors and their corrections for a book or other publication — that is added to your book. Or, like BCcampus, record adjustments on a **Versioning History page.** If there is more than one format or file type for which the textbook is available, remember to update these and note the date on the erratum or Versioning History page.

Revisions

Many authors are already thinking about the next edition of their textbook before the first edition is published. They realize that their textbook is a snapshot of information and that this information will continue to evolve after the book is published, so they plan for the next edition immediately. (Remember:

Writing a book will never feel finished. There is always something that can be changed, improved, or added. At some point you will need to stop and say "good enough.")

Some authors prepare by collecting notes about what they'd like to change, and material and resources they want to add to the next edition. Others create a duplicate copy of their book — easy to do in Pressbooks, for example — and use it as a template for the next edition. If you want to plan ahead for the next edition, decide how much new and changed information warrants a new edition, and how often this might occur.

Schedule

The maintenance schedule for your book can and should include all tasks that will keep your book relevant and current. Develop a timetable and process for each of the following:

- Responding to, reviewing, and incorporating feedback
- Checking and fixing links and embedded multimedia in online books
- Correcting reported/detected errors
- Adding minor updates to keep the content current
- Creating a new edition

Don't forget to inform colleagues and collections that use and host your textbook about significant changes. (See Communications and Track Adoptions.)

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*For more information, see the Authoring Open Textbooks chapter on **Updates and Revisions**.*

Attributions

Group has been designated to the public domain (CC0).

41.

Track Adoptions

One of the side benefits of self-publishing an open textbook is an automatic membership in the open education community for which it is written. As the author of an open textbook, you are in a unique position that not only allows you to pinpoint members of this community — by tracking instructors who use or **adopt** your book in the classroom — but also establishes you as an OER contributor.

Capturing and recording open textbook **adoptions** in British Columbia is a key task for BCcampus Open Education. We ask faculty using open textbooks to fill out our Adoption of an Open Textbook form by providing us with their name and institution, the course for which the textbook is used, the number of students enrolled in each section of the course, the cost of the displaced textbook, the terms in which the adoption occurs, and whether the adoption will be ongoing. We also ask adopters if we may share their information with other interested faculty.

Surprisingly, this work has proven to be more than just about numbers. It has also led BCcampus to our province's flourishing open education community. Tracking adoptions has helped our team to connect with and support faculty and staff interested in open education. Paying attention to who is using open textbooks has revealed open education trends in B.C.'s colleges, institutes, and universities, and has given us the ability to connect the dots — and make introductions — between likeminded colleagues.

> For your textbook, decide how you will track its adoptions and what statistics you'll collect. Add the details to your communications plan. (See Communications.) Here is a template that can be used to record these numbers:
>
> - Adoptions Spreadsheet template [Excel file]

Remind colleagues who are using your textbook — or potential adopters — that they are free to customize it to fit the requirements of their curriculum, students, and teaching style. (See the BCcampus Open Education *Adaptation Guide*.) You can ask adopters for comments about what they like about the book and if they have suggestions for changes or additions that might improve the book, items you can take note of your next edition. These individuals might even agree to writing a review or assisting with an update. (See Maintain the Book and Textbook Reviews.)

Put your stats to work

Like reviews, posting adoption statistics will encourage other instructors to look at your textbook. The

amount of information you share and post by your textbook will depend on the permissions granted by current adopters who have contacted you. You might choose to present anonymized numbers that show the total number of instructors, institutions, savings, and students affected.

At BCcampus, we display adoption statistics in two views. On our website's home page, a banner containing aggregated numbers on student savings, total adoptions, and number of participating institutions in British Columbia are posted.

The BCcampus Open Education website displays savings and adoption statistics for the B.C. Open Textbook collection. These stats are current as of January 2018.

When the "More Stats…" link (circled in red in the above image) is clicked, then details about these numbers are revealed on another web page, along with definitions for the various terms used to describe adoption statistics (see below).
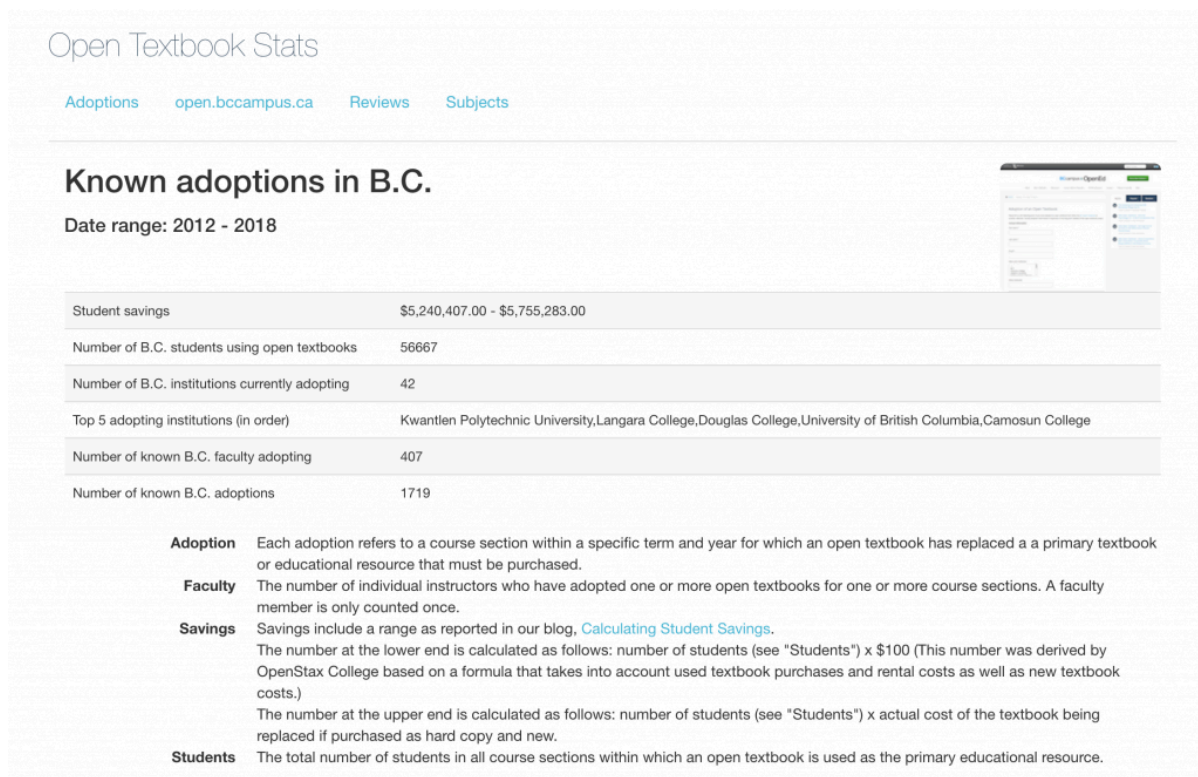
BCcampus Open Textbook Stats page. [Long Description]

Lastly, consider how to analyze your adoption statistics. For instance, you might examine them for trends by geography, course level and type, and term or semester. Use these numbers to guide the ongoing promotion of your book and to educate current and future users.

Long Descriptions

Image long description: The BCcampus Open Education website stats page

Student savings	$5,240,407.00 to $5,755,283.00
Number of B.C. students using open textbooks	56,667
Number of B.C. institutions currently adopting	42
Top 5 adopting institutions (in order)	1. Kwantlen Polytechnic University 2. Langara College 3. Douglas College 4. University of British Columbia 5. Camosun College
Number of known B.C. faculty adopting	407

Adoption: Each adoption refers to a course section within a specific term and year for which an open textbook has replaced a primary textbook or educational resource that must be purchased.

Faculty: The number of individual instructors who have adopted one or more open textbooks for one or more course sections. A faculty member is only counted once.

Savings: Savings include a range. The number at the lower end is calculated as follows: number of students (see "Students") times $100 (This number was derived by OpenStax College based on a formula that takes into account used textbook purchases and rental costs as well as new textbook costs.) The number at the upper end is calculated as follows: number of students (see "Students") times the actual cost of the textbook being replaced if purchased as hard copy and new.

Students: The total number of students in a course section within which an open textbook is used as the primary educational resource.

[Return to Image]

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42.

Textbook Reviews

Giving faculty and students the opportunity to read reviews about your textbook adds to the book's credibility. A textbook with many positive reviews will reassure instructors looking for an open textbook that their colleagues approve of it. The reviews will also help you improve the quality of your textbook. By reading reviews carefully, you will learn about reported errors and suggested improvements. Record errors that can be fixed immediately in your maintenance plan and note any suggestions for future editions of your textbook. (See Maintain the Book.)

Review rubric

Using an established set of questions — or rubric — yields consistent and comprehensive feedback from each individual who reviews your textbook. Several open-education organizations use the BCcampus Open Education Review Rubric [Word file] — an openly licensed document available to anyone to use or change. Feel free to use this rubric, either as is or customized to your needs, if you decide to solicit reviews once your textbook is finished. These are the topics it covers:

1. Comprehensiveness
2. Content accuracy
3. Relevance and longevity
4. Clarity
5. Consistency
6. Modularity
7. Organization, structure, and flow
8. Interface
9. Grammatical and spelling errors
10. Diversity and inclusion
11. Book recommendation

Find reviewers

There are several ways to locate reviewers. However, before looking for candidates, think about how you will determine a reviewer's qualifications. At BCcampus Open Education, we ask that reviewing faculty fill out an application form and describe their credentials for and experience in teaching the textbook's

subject. We also ask for a list of current courses they are teaching at a post-secondary institution in the textbook's subject area.

Once this information has been received, our team confirms this data by searching for the reviewer in their university or college's faculty directory. If the individual is not listed, we ask for confirmation of their position from the department chair or dean.

How you canvass for potential reviewers will depend on your discipline, home institution, and the resources available to you. One obvious method is to include a request for reviews wherever your textbook is posted. This might be in your institution's library catalogue or on your department or faculty website. Information should include details such as reviewer qualifications, the review process, and payment for a completed review. If payment, even a small stipend, is not feasible, consider a barter arrangement with fellow open textbook authors in the same discipline. In other words, you offer to review their textbook in exchange for a review of yours.

Some collections, such as the [Open Textbook Library](#) and the [B.C. Open Textbook Collection](#), make it is a matter of course to gather reviews about books in their repositories. When you apply to add your book to a collection, ask if you may take a copy of the reviews generated for your textbook and place them in other spots where your textbook is posted. It is likely that these reviews, like the textbooks, are openly licensed. (See [Communications](#).)

Procedure

Develop a procedure for processing reviews from beginning to end. For example, decide how reviewers should contact you with a request to review your book, whether it's by email, an application form, or other. Create a system for receiving the completed review, tracking in-progress reviews, and posting reviews. Consider constructing templates and standard language that can be used for communicating with reviewers at each stage of the process.

Deadlines are important for both you and the reviewer. At BCcampus, reviewers are given a deadline of three months to finish. If they don't, access to the review form expires and reapplication to review the book is required. It has been our experience that approximately half of all applicants complete reviews.

BCcampus Open Education follows standard procedures — including email templates — that provide efficient and consistent services to reviewers. The steps include:

1. Posting a call for reviews to [Review an Open Textbook](#) on the BCcampus OpenEd website and by each textbook in the [B.C. Open Textbook Collection](#)

2. Requiring that potential reviewers fill out an [application](#) to determine their eligibility

3. Vetting all applications to confirm each reviewer's qualifications

4. Emailing each successful candidate a copy of the BCcampus Open Education [Review Rubric [Word file]](#), instructions, and the deadline

5. Recording and monitoring all reviews at each stage of the process whether they are in progress, completed, or expired

6. Sending a confirmation email to the reviewer once the completed review is submitted, then

posting the review, and updating records

Like the textbooks for which they are written, reviews are typically *open*, i.e. they are **open peer reviews**. This means that the reviewer's name, position, and institution are published along side the review.

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Appendix 1: Licences and Tools

Below are descriptions of the public domain tools and Creative Commons (open-copyright) licences used in open textbooks and other open educational resources.

Public domain tools

When copyright, trademark, patents, or other intellectual property (IP) laws expire, the works protected by these laws enter the **public domain**. Works within the public domain are owned by the public, which means that anyone is allowed to use these works without obtaining permission, but no one can own them.[1] (See Copyright and Open Licences.)

Some creators choose to place or "dedicate" their works to the public domain. For this, Creative Commons has created **public domain tools** to enable the "labeling and discovery of works that are already free of known copyright restrictions".[2]

CC0 (CC zero)

The CC0 logo can be used to mark a work indicating that:

> The person who associated a work with this deed has **dedicated** the work to the public domain by waiving all of his or her rights to the work worldwide under copyright law, including all related and neighboring rights, to the extent allowed by law.

> You can copy, modify, distribute and perform the work, even for commercial purposes, all without asking permission.[3]

This tool is best used for your own work, not those owned by others or currently in the public domain. Think of CC0 as the "no rights reserved" option.[4] Below are two logos that can be used: an icon and a button. Notice that 0 (zero) is the prominent symbol used to indicate that the creator of the work, and thus copyright owner, has removed all restrictions: in other words, there are zero restrictions. For more information, see the Creative Commons CC0 page.

1. Rich Stim, "Welcome to the Public Domain," *Copyright and Fair Use: Stanford University Libraries,* http://fairuse.stanford.edu/overview/public-domain/welcome/ (accessed August 2, 2017).
2. "Public domain," *Creative Commons*, https://creativecommons.org/share-your-work/public-domain/ (accessed August 2, 2017).
3. "CC0 1.0 Universal(CC0 1.0): Public Domain Dedication," *Creative Commons*, https://creativecommons.org/publicdomain/zero/1.0/ (accessed August 2, 2017).
4. "CC0 FAQ," *Creative Commons*, https://wiki.creativecommons.org/wiki/CC0_FAQ#What_is_CC0.3F (accessed January 3, 2018).

CC0 (CC zero) icon

CC0 (CC zero) button
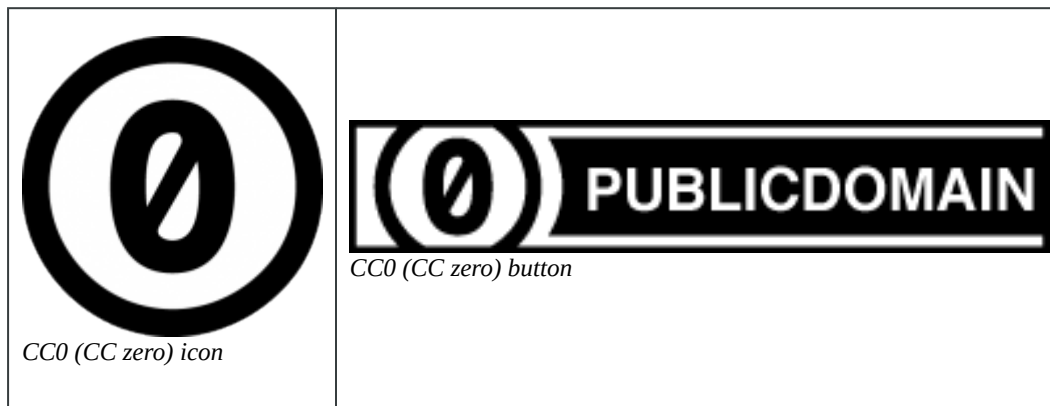
Public Domain Mark

The **Public Domain Mark** should be used to "mark works already free of known copyright and database restrictions and in the public domain throughout the world."[5] For more information, see the Creative Commons Public Domain Mark page.

Below are two logos that can be used to present the Public Domain Mark: an icon and a button. The representative image is a line through the copyright symbol, a C, indicating that copyright no longer applies, and the work is now in the public domain.

Public domain mark icon

Public domain mark button
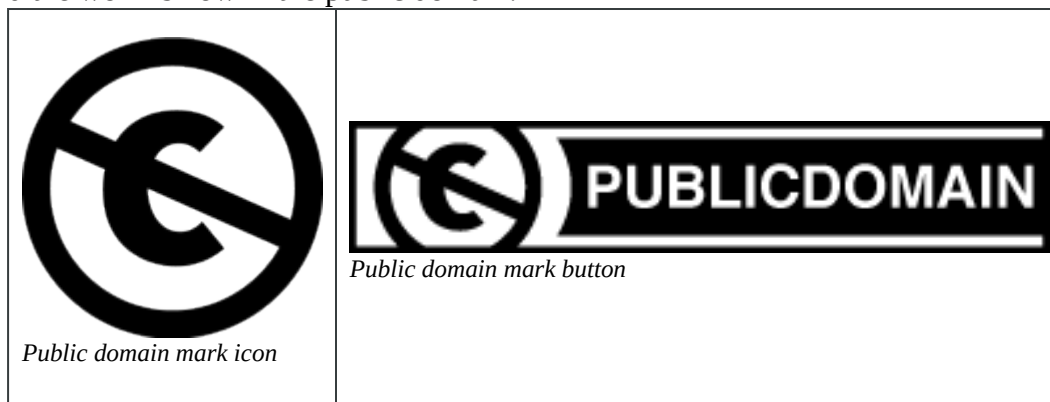
Creative Commons licences

Here are the most commonly used Creative Commons licences listed in order of permissions, from most open to least open.

5. "Public Domain Mark," *Creative Commons,* https://creativecommons.org/share-your-work/public-domain/pdm/ (accessed December 13, 2017).

	CC BY Attribution (BY) – This licence allows others to distribute, change, remix, and build upon your work, even commercially, as long as they credit you for the original creation. This licence gives anyone using your work the most permissions.
	CC BY-SA Attribution (BY) ShareAlike (SA) – This licence allows others to distribute, change, remix, and build upon your work, even commercially, as long as they credit you for the original creation. This licence is often compared to open source software licences. You, and anyone using your new version of this work, must release these adaptations with the same ("share alike") CC BY-SA licence.
	CC BY-NC Attribution (BY) NonCommercial (NC) – This licence allows others to distribute, change, remix, and build upon your work as long as they credit you for the original creation. However, they cannot sell it or profit from it except to recuperate costs of printing, for example. It is a nonprofit licence.
	CC BY-NC-SA Attribution (BY) NonCommercial (NC) ShareAlike (SA) – This licence allows others to distribute, change, remix, and build upon your work as long as they credit you for the original creation. However, you cannot sell it or profit from it except to recuperate costs of printing, for example. It is a nonprofit licence. You, and anyone using your new version of this work, must release these adaptations with the same ("share alike") CC BY-NC-SA licence.
	CC BY-ND Attribution (BY) NoDerivatives (ND) – This licence allows for redistribution, commercial and non-commercial, as long as it is passed along unchanged and in whole, with credit to you. **BCcampus Open Education does not include textbooks that have ND restrictions in the [B.C. Open Textbook Collection](#).**
	CC BY-NC-ND Attribution (BY) NonCommercial (NC) NoDerivatives (ND) – This licence is the most restrictive of the six main Creative Common licences, allowing redistribution. This licence is often called the "free advertising" licence because it allows others to download and share your work with others as long as they credit you, but they can't change them in any way or use them commercially. It is a nonprofit licence.

You can also watch these videos for more information

The first video, by Creative Commons, is called "Wanna Work Together?" about open-copyright licences.

> *One or more interactive elements has been excluded from this version of the text. You can view them online here: https://opentextbc.ca/selfpublishguide/?p=250#oembed-1*

This second video was produced by the University of Guelph Library and is called "What are Creative Commons Licenses?"

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://opentextbc.ca/selfpublishguide/?p=250#oembed-2

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Appendix 2: Style Guide

Before writing a new textbook or revising an existing one, it is important to establish a road map that will guide the style of the work. That's where a style guide comes in handy. In addition to the style guide, you should create a style sheet that outlines the specific characteristics of your book. (See Create a Style Sheet.)

Below is an alphabetical list of the topics covered in this style guide. Also see the BCcampus *Writing Guidelines for Style and Tone*.

BCcampus follows the *Canadian Press Stylebook.*

Boldface

Citation Style

Dashes

Dictionaries and Reference Books

Italics

- Italics and foreign words

Labels and Captions

Measurements

Numbers

Punctuation

- Emphasizing words with punctuation

Reference Lists

Spacing

Spelling

Boldface

Boldface is reserved for key terms within the text body. It should not be used for emphasizing a word or phrase. See [emphasizing words with punctuation](#).

Citation style

Like any academic work, it is important to cite new information. Refer to [SFU's Writing & Style Guides](#) for citation style guides and tips on how to cite. (See also [Citation vs. Attribution](#).)

Select the citation style to be used for referencing material in your book and note this on your style sheet. If you are writing about a subject within a specific discipline, select the citation style appropriate for that field.

If you are adapting an existing book, use the citation style chosen by the original author.

With reference to the style guide you have chosen, determine:

- Whether you should use footnotes or in-text citations and how to format them
- How to reference direct quotations. Should a page number be used for the citation style you've chosen?
- How to list multiple authors in an in-text or full-reference entry
- Where will the reference list be placed

If you are adapting a work and remove an in-text citation, remove the reference from the reference list.

If you want to indicate sources used for writing that have not been specifically cited in the text, add these items to a Bibliography at the end of the chapter.

Pay close attention to the punctuation used for the citation style you've chose, such as:

- Where periods are used
- Use of italics
- Use of brackets
- Use of quotation marks
- Use of spaces

Note: No periods should be used after URLs when they end a reference list entry.

See [Reference Lists](#).

Dashes

Em dashes (—)

- The em dash is the standard for breaking a sentence or setting off parenthetical statements.
- With em dashes, insert a space on either side.
- In Pressbooks, the em dash is created by using two hyphens. In the Book view, two hyphens will look like one long (em) dash.

En dashes (-)

1. Use an en dash when expressing a range of numbers, such as the years of a person's life, e.g., 1955-2001.
2. There should be no space on either side of the en dash.
3. In Pressbooks, use one hyphen to indicate one short (en) dash.

Dictionaries and reference books

- *Canadian Oxford Dictionary, 2nd ed*
- *Canadian Press Stylebook*
- BCcampus *Writing Guidelines for Style and Tone*

For in-text citations and reference lists, consult the style manual particular to the discipline you work in (e.g., *MLA Handbook, APA, Chicago Manual of Style*).

Italics

- Use italics for words used as words (e.g., The term *vocal cord*s is often misspelled. What do you mean by *nexus*?)
- The titles of books, movies, TV shows, and radio programs are italicized (e.g., *The Grey Fox, Definitely Not the Opera*). The names of bands and music channels are not italicized (e.g., Bob's Your Uncle, MuchMusic).

Italics and foreign words

Often, foreign words are italicized in a textbook. However, if you're not sure whether to use them or not, consider the following:

- If the word is not italicized in the dictionary, then italics shouldn't be used.
- "Common" foreign words do not take italics (e.g., ad hoc, vis-a-vis).
- In Canadian English, many French words are not italicized.

Labels and captions

For guidelines on how to label, number, and add captions to all resources non-text resources, see [Resources: Captions and Attributions](). This section also discusses best practices for attributing objects that are not original creations but have instead been borrowed from an external repository.

Measurements

Because this style guide was created for Canadian authors, metric measurements are used. As such, we use kilometres, not miles; millimetres, centimetres, and metres, not inches, feet, or yards; kilograms not pounds; and Celsius (C), not Fahrenheit (F).

If an existing book is being revised, convert imperial measurements to metric and round off the result. For example, 10 inches equals 25.4 centimetres. Record this as 25 centimetres.

Numbers

Spell out numbers from one to nine and use Arabic numerals for numbers greater than nine, except as indicated in the checklist below.

- For ordinals, spell out first through ninth unless they are part of an array that includes a higher ordinal. Ordinals greater than ninth are expressed as numerals unless they occur at the beginning of a sentence (…in the 12th century but Twelfth-century monks…). Acceptable suffixes are 21st, 32nd, 43rd, 54th.
- For fractions, spell out in running text with a hyphen (e.g., two-thirds).
- Use commas in numbers greater than 999.
- For percentages, use Arabic numbers and the % symbol, closed up. The symbol should be repeated with each number in a range or series (the incidence varied from 1% to 4%; 6% to 7% of cases). If a sentence begins with a percent value, spell out both number and percent.
- For temperatures, use Arabic numerals and the degree symbol (37.8°C).
- For times of day, use a colon only when a fraction of an hour is indicated (9:05 a.m.; otherwise 2 p.m.). With 12 o'clock, specify noon or midnight.
- For number ranges in text, use "to" (50 to 100 mg) except for years (1998–99, 1999–2013) and pages (213–223), which take en-dashes.
- For number ranges in tables and parentheses, use an en-dash (50–100 mg).
- Always use numerals with school grades (e.g., Grade 6).
- Use digits and abbreviations in measurements. (e.g., The puzzle boxes were 50 cm long, 38 cm wide, and 30 cm tall.)

When to use numerals rather than words

- In addresses (e.g., Suite 2, 400 West Hastings)

- For dates (e.g., 17 May 1948 or May 17, 1948)

- As designators (e.g., day 8, chapter 10, page 9, protocol 5)

- In figure and table designations (e.g., Figure 3, Table 6)

- For money (e.g., $14, $9.97, 6 cents, US$200)

- For temperatures (e.g., 20°C)

- For time of day (e.g., 11 p.m., 2:45 a.m., 07:30–13:00)

- With units of measure (e.g., 2 m, 7.2 kg)

- With percent symbols (e.g., 0.02%, 99%)

- With "million" and "billion" (e.g., $1 million, 9.4 billion units)

Punctuation

Consider how punctuation will be handled in your book. Below is the standard established for this style guide. If you choose one or more different styles, enter these on your style sheet. (See Create a Style Sheet.)

- Standard usage for this style guide is a **serial comma**, i.e., a comma placed immediately before the coordinating conjunctive (*and, or, nor*). A serial comma is also known as an **Oxford comma**.

    ◦ **Serial comma**: There were cows, horses, and pigs in the barn.

    ◦ **No serial comma**: There were cows, horses and pigs in the barn.

- Use commas in numerals over 999 (e.g., 1,000; 45,000)

- In displayed lists, always start items with a capital letter. Use end punctuation, such as a period, with full sentences only.

- Do NOT capitalize the first letter of the first word after a colon unless the colon introduces two or more sentences.

- With em dashes, insert a space on either side.

- Use the North American system for quotation marks: periods and commas always go inside quotation marks; semi colons and colons go outside.

- Use double quotation marks for all quoted matters. Single quotation marks should be reserved to enclose quotes within quotes. (e.g., Mark exclaimed, "You have driven a stake into my heart! Now I truly understand Caesar's words, 'Et tu Brute?' How could you treat me so?")

    ◦ Some exceptions to this system may be appropriate in specific disciplines. Please check with your project manager or copy editor.

- Place footnote numbers outside end punctuation (usually a comma or period).

- Do not use periods in abbreviations, acronyms, and initialisms, except as noted in a spelling list (e.g., et al., etc., i.e. are the most common that retain the periods).

- Do not hyphenate Latin phrases used adjectivally. (e.g., ad hoc proposal, post hoc analysis.)

- For hanging hyphen constructions (15- to 19-year-olds), do not hyphenate after "to."

- Do not use quotation marks with so-called. (e.g., Her so-called friend left her standing in the rain.)

- Use italics for words used as words (e.g., The term *vocal cord*s is often misspelled. What do you mean by *nexus*?)

Emphasizing words with punctuation

Sometimes an author will want to stress or emphasize a word or phrase. While acceptable, this practice should be kept to a minimum. In most cases, the word(s) should be written in a way that the stress or importance of a word or term is clear in context. Follow these guidelines:

- Do NOT use boldface or quotation marks for emphasis. **Boldface** in this style guide is reserved for key terms within the text body.

- Use italics for words used as words (e.g., The term *vocal cord*s is often misspelled. What do you mean by *nexus*?)

- Words that are meant to alert the reader that a term or word is used in a non-standard, ironic, or other special sense should be marked off with quotation marks (e.g., "Child protection" sometimes fails to protect).

- Words that are common expressions and figures of speech should NOT be set off in any way.

Reference lists

Reference lists are typically laid out in alphabetical order by the last name of the primary or first-listed author. This, however, does depend on the citation style that your choose.

If the title of a publication is used instead (no author listed), then entries that begin with "The" should be alphabetically sorted by the word after "The." (e.g., The Economist should be sorted in the E's.)

See [Citation Style](#).

Spacing

Use only **one space** after a period (i.e., between sentences) and after a colon (:).

Spelling

In general, Canadian spellings are used for open textbooks managed by the BCcampus Open Education. (See [Appendix 3: Canadian Spellings and Word List](#).) List all spelling exceptions on the style sheet for your textbook. (See [Create a Style Sheet](#).)

For authors who are not writing in English, a standard spelling list can be created as part of the textbook's style sheet.

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Appendix 3: Canadian Spellings and Word List

Also see <u>How to Canadianize an OER</u> in the *Adaptation Guide*.

In general, the style guide for the *Self-Publishing Guide* recommends Canadian spellings. (See <u>Appendix 2: Style Guide</u>.) Consult this list for the first-choice spelling preferences for words and terms. For words not included on this list, BCcampus Open Education references the *<u>Canadian Oxford Dictionary</u>*. Any spelling exceptions should be recorded on your textbook's style sheet. (See <u>Create a Style Sheet</u>.)

<u>A</u> <u>B</u> <u>C</u> <u>D</u> <u>E</u> <u>F</u> <u>G</u> <u>H</u> I <u>J</u> <u>K</u> <u>L</u> <u>M</u> <u>N</u> <u>O</u> <u>P</u> Q <u>R</u> <u>S</u> <u>T</u> <u>U</u> <u>V</u> <u>W</u> <u>X</u> <u>Y</u> <u>Z</u>

A

a.m./p.m.
Aboriginal (preferred to "Indian" and "Native")
acknowledgment (no "e")
Act (of Parliament; u.c., roman)
AD/BC (small caps, no periods; AD 5, 12 BC) [Note, however, that in most current texts, CE and BCE are preferred style.)
advisor (not -er)
aging
AIDS (no need to spell out)
Alzheimer's disease
analgesics
analogue
analyze
anti (close compound except when word begins with an i or capital letter, or if word may be unclear or looks awkward)
anti-anxiety
anti-inflammatory
attention deficit disorder, ADD
attention deficit hyperactivity disorder, ADHD
attorney general (no hyphen; u.c. when used as title)
audioconferencing
axe

B

baby boomers
barbecue

backup (n. and adj.)
B.C. (the province)
behaviour
benefited
benzodiazepine
best-seller list
Bill (u.c. when referring to legislation)
breastfeeding, breastfed
breast milk
burnout (n.)
bylaw
bypass
by-product

C

cabinet (l.c.)
café
calibre
caregiver, caretaker
catalogue
CD-ROM
cellphone
centre
chair (not chairman or chairperson)
checkup (n.), check up (v.)
cheque, chequebook
child care
childbearing
cigarette
clawback
cleanup (adj., n.)
clear-cut (adj.)
co-author
co-chair
co-director
coexisting
co-founder
cognitive-behavioral therapy, CBT
co-infection
colour
co-management
common sense (n.), commonsense (adj.)
cooperate
coordinate
co-payment
cost-effective, cost-effectiveness

counselling, counsellor
co-worker
Criminal Code
cross-examine
cutoff (adj.)

D

data (may be plural or singular, but be consistent)
database
data set
day care (n.), day-care (adj.)
decision-maker (n.)
decision making (n. phrase)
decision-making (adj.)
de facto (no italics)
defence (n.)
dependant (n.)
dependent (adj.)
desktop
diarrhea
dietitian
dos and don'ts
dropout (n.)

E

e.g. (follow with comma)
e-learning
email
emphasize
endeavour
endpoint
end-stage (adj.)
end-user
enroll, enrolled, enrolling, enrollment

F

favour
fetus
fibre optic
field test
fieldwork
first aid supplies
First Nations
firsthand

flare-up (n.), flare up (v.)
focused, focusing
…fold (close compound and spell out number used, "twofold," "twelvefold")
follow-up (n., adj.), follow up (v.)
front-line (preceding adj.)
fuelled
fulfill
full-time
fundraising

G

glamour
governor general (no hyphen; u.c. as title)
Grade (1, 2, etc.)
grey

H

halfway
hand washing (v.), hand-washing (adj.)
hands-on (adj.)
health care (n. or adj., open)
HIV (human immunodeficiency virus; never HIV virus)
HIV/AIDS (no need to spell out)
HIV-positive
honorary
honour
hotline

I

i.e. (follow with comma)
Indian (see "Aboriginal" "Non-Status" and "Status")
Indo-Canadian
inpatient
in-service
instalment
Interior, the (of B.C.)
internet
intra (close compound except when word begins with a or when word may be unclear or looks awkward)
intranet

J

judgment

K

kg (sing. and pl.), but use only with measurements; otherwise spell out as kilograms

L

labelled, labelling
labour
layperson
legislature (but B.C. Legislative Assembly)
licence (n.), license (v.)
lieutenant governor (u.c. when used as title)
life cycle
lifelong
lifesaving
life stage
lifestyle
lineup (n.), line up (v.)
litre
login (n.), log in (v.)
long-lasting
long-standing
long-term, longer-term (adj.)
Lower Mainland

M

makeup (n.)
manoeuvre
medallists
mental health (n. or adj., open)
meta-analysis
Métis
metre
mg (sing. and pl.), but use only with measurements; otherwise spell out as milligrams
midlife
Ministry of Health, MOH (not "MoH")
modelling
mL (sing. and pl.), but use only with measurements; otherwise spell out as millilitres
multi (close compound when word begins with consonant, "multidisciplinary," "multispecialty"; hyphenate with vowel, "multi-authored")

N

nationwide
Native people ("Indigenous" preferred)
neighbour

neonatal
non (close compound except when word may be unclear or looks awkward)
non-Aboriginal
nonprofit
nonresidents
nonsmoker

O

offence (n.)
ongoing
online
on-site (adj.)
oriented (not "orientated")
outpatient
overeating
overprotective
overrepresented
overuse, overused

P

Parliament
payoff
per se (not ital.)
percent
policymaker
post (close compound except when word may be unclear or looks awkward)
Post-it Notes
postgraduate
postsecondary
post-traumatic
PowerPoint
practice (n.), practise (v.)
pre (close compound except when word begins with e or if word may be unclear or looks awkward)
predeceased
pre-existing
preventive (not "preventative")
prioritize (not "priorize")
program, programmed, programming
province-wide
publicly (not "publically")

Q

quasi- (hyphenate compound except in rare cases—"quasicrystal")

R

raison d'être (no ital.)
randomized controlled trial, RCT
re (close compound except when word may be unclear or looks awkward; re-emerge, reissue)
reassessment
real-time (adj., no quotation marks)
rebuild
re-create (as in "create anew")
re-evaluate
reinstate
risk-benefit ratio

S

seatbelt
Sea-to-Sky Highway, corridor
secondhand
Section (of legislation)
sexually transmitted infection, STI (preferred to "sexually transmitted disease, STD")
shock wave
shortcut
shortsighted
side effect (always open)
sizable
skeptical
skillful
SkyTrain
smart phone
sociocultural
socioeconomic
specialized
spinoff (n.)
Status Indian
sub-Arctic
sub-Saharan Africa
subspecialties
subtypes
sulphur

T

telehealth, telemedicine
time frame
toward (not "towards")
travelled, travelling
T-shirt

tumour
TV
type 1 and 2 diabetes

U

under way (adv., two words; adj., one word)
underfunded
under-represented
underserviced
up-to-date (adj.)
U.S. (when used as an adj. or in a table/figure; otherwise spell out)
usable
user name

V

videoconferencing
video-imaging (n.)
vis-à-vis
vitamin C
voicemail

W

wait list (n.), wait-list (v. and adj.)
walk-in clinic
wavelength
web, the
website
well-being
West Nile Virus, WNV
West Side (of Vancouver)
Western society, Western world, Western Canada
widespread
Wi-Fi
workday
workforce
workload
workout
workplace
workup
World War I, II
World Wide Web
worldwide

X

X-ray

Y

Z

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Appendix 4: Contracts and Agreements

Below are simple templates that can be used as stand-alone contracts or agreements, or as schedules added to larger contracts. Three versions are provided for the different individuals who might assist with an open textbook. In addition, a consent and release form is listed for interview subjects, as well as, an agreement for students who wish to publish their course work with a Creative Commons licence. This latter form is an adaptation of an agreement created by Kwantlen Polytechnic University.

These contracts, agreements, and form have not been reviewed by a legal expert. For questions or more information about contracts, please consult with a legal professional.

1. Contributing Authors [Word file]
2. Copy Editors [Word file]
3. Support Staff [Word file]
4. Interview Consent and Release Form [Word file]
5. Photo/Video Subject Release Form [Word file]
6. Student Agreement to Publish Course Work under a Creative Commons Licence [Word file]

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*For more information, see the Authoring Open Textbooks chapter on **Contracts**.*

Appendix 5: Checklists

Here are checklists for each phase of a textbook-creation project. These can be used to conduct a gap analysis and to manage the project.

1. Look Before You Write [Word file]
2. Prepare to Write [Word file]
3. Plan the Book [Word file]
4. Write and More [Word file]
5. Edit and Review [Word file]
6. Pre-publication [Word file]
7. Post-publication [Word file]

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*For more information, see the Authoring Open Textbooks chapter on **Checklist**.*

Glossary

Glossary

5 Rs: The five tenets of the open movement: redistribute, remix, retain, reuse, and revise.

access: The ability of students, instructors, and others to obtain or gain access to education.

accessibility: The practice of creating online, digital, and print educational materials that are accessible to all, regardless of level of ability.

adapt: To customize or revise an open textbook or other open educational resource that has been released under an open-copyright licence.

adaptation: A work that has been revised or adapted. (See *adapt*.)

adopt: When instructors use an open textbook and/or other OERs in the classroom

adoption: An open textbook or OER that has been selected by an instructor to be used in their classroom.

Affordable Learning Georgia: A [University System of Georgia (USG)](#) initiative to promote student success by providing affordable textbook alternatives

APA (American Psychological Association) style: A style guide containing citation and styling information for works in the social sciences and education fields.

appendix/appendices: A part of the back matter of a book that provides supplementary material to information found in the main work.

attribute: To giving credit to the creator of an original work. This the most basic requirement of a Creative Commons Attribution (CC BY) licence. (See *CC (Creative Commons) licence*.)

attribution statement: A line crediting the original creator of a work, which fulfills the legal requirement of open-copyright licences. The statement should include the title of the work, the name of the creator, and licence type (with links to all).

back matter: The end section of a book. It typically contains material that supplements the main text.

BCcampus: An organization supporting the post-secondary institutions of British Columbia as they adapt and evolve their teaching and learning practices to enable powerful learning opportunities for the students of B.C.

bibliography: A list of all works used as references within a textbook, both those cited and read as background in preparation for writing. In the Chicago Manual of Style, the bibliography takes the place of a reference list. (See *reference list*.)

Campus Manitoba/OpenEd Manitoba: An initiative by Manitoba's Minister of Education and Advanced Learning with the goal of making higher education more accessible by reducing students costs through the use of openly licensed textbooks in Manitoba.

caption: Text that accompanies a figure, table, or image within a work. A caption may include the image type, the image number, a description of image, and possibly an attribution statement.

CC (Creative Common) licence: An open-copyright licence (also called a copyright licence) that allows the copyright holder to provide a defined set of permissions to their work which allow others to use, share, and change the work providing the creator of the work is given credit.

CC0 (CC zero): A tool that can be used for individuals who have dedicated their work to the public domain by waiving all of their rights to the work worldwide under copyright law, including all related and neighbouring rights, to the extent allowed by law. See *public domain*.

CCCOER: A growing consortium of community and technical colleges committed to expanding access to education and increasing student success through the adoption of open educational policies, practices, and resources.

Chicago Manual of Style (Chicago style): A style guide containing citation and styling information for works in the humanities. This style was developed by the Chicago University Press in 1906.

choice overload: A situation where it is difficult to make a decision because there are so many options.

citation: A method of providing the original source for information taken from a copyrighted work. The form a citation takes is generally determined by the style guide being used.

citation style: A standard for how citations should appear, either in-text or footnotes, and within the reference list or bibliography.

colophon: "A brief statement containing information about the publication of a book such as the place of publication, the publisher, and the date of publication."[1]

Commons: A general term often used to describe the entire body of OER and other open materials.

Connexions: A repository of open educational resources started by OpenStax where faculty, students, and others can view and share these items (https://cnx.org).

copy edit: To review and correct the grammar, spelling, punctuation, clarity, consistency, and style of a written work.

copyright: The exclusive legal right, given to an originator or an assignee, to print, publish, perform, film, or record literary, artistic, musical or other creative material, and to authorize others to do the same.

copyright infringement: To infringe (use without permission) or induce the infringement of any third-party copyrights.

copyright licence: A licence by which a licencor can grant additional copyright permissions to licencees. See *open-copyright licence*.

copyright notice: Information posted by the creator of a work that lists the copyright symbol (the letter C inside a circle) or the word "copyright" followed by the year in which the work was created, and the name of the copyright owner. Sometimes, a *statement of rights* is also included.

Creative Commons (CC): A nonprofit organization devoted to expanding the range of creative works available for others to build upon legally and to share. For more information see the [Creative Commons website](#).

derivative: See *adaptation.*

ecampus Ontario: A nonprofit corporation funded by the Government of Ontario to be a centre of excellence in online and technology-enabled learning for all publicly-funded colleges and universities in Ontario.

editable file: Files for a textbook that can be easily changed or edited. (See [Editable Files](#).)

EPUB: A file type designed for e-readers. It can be downloaded and read on mobile devices such as smart phones, tablets, or computers. See *MOBI*.

erratum (*Pl errata*): A record of errors and their corrections for a book or other publication. Usually this statement gets its own page in the back matter. See *Versioning History page*.

1. "Colophon (publishing)," *Wikipedia*, https://en.wikipedia.org/wiki/Colophon_(publishing) (accessed February 12, 2018).

ethnocentrism: "a tendency to view alien groups or cultures from the perspective of one's own"[2]

fair dealing: An exception in Canada's *Copyright Act* that allows you to use other people's copyright-protected material for the purpose of research, private study, education, satire, parody, criticism, review or news reporting, provided that what you do with the work is 'fair.'

fair use: A legal doctrine defined by the U.S. Copyright Office that promotes freedom of expression by permitting the unlicensed use of copyright-protected works in certain circumstances.

figure: A label applied to an image or picture posted in an open textbook to assist with numbering (e.g., Figure 1.1.).

fixer: Someone who oversees the layout, formatting, and correct treatment of the various elements of an open textbook.

foreword: A short piece typically written by an outside expert in the field at the request of the primary author to be included in the front matter of a textbook.

front matter: The beginning section of a book placed before the main body.

GitHub: A development platform that includes open source projects such as open textbooks. For more information see https://github.com/.

HTML file (Hyper Text Markup Language): A file type designed for transferring information from one source to another.

hypothes.is: An open-source online annotation tool. For more information see https://web.hypothes.is/.

intellectual property: A form of creative effort that can be protected through a trademark, patent, or copyright.

intellectual property rights: The permissions that cover creative efforts of intellectual property, of which copyright is one.

Internet Archive: Wayback Machine: A digital archive of the World Wide Web and other information on the Internet created by the Internet Archive, a nonprofit organization based in San Francisco.

LaTeX: A program used to typeset complex scientific and mathematical notations correctly.

licence: See *copyright licence.*

MERLOT (Multimedia Educational Resource for Learning and Online Teaching): A curated collection of free and open online teaching, learning, and faculty development services contributed and used by an international education community. For more information see https://www.merlot.org/merlot/index.htm.

MLA (Modern Language Association of America) style: A style guide containing citation and styling information for works in the literary and humanities fields.

MOBI: A file type that can be read on a Kindle e-reader or with Kindle software. See *EPUB.*

OER (open educational resources): Teaching, learning, and research resources that permit free use and repurposing because they are under an open-copyright licence or because they reside in the public domain and are not copyrighted.

OER Commons: A public digital library of open educational resources launched by ISKME (Institute for the Study of Knowledge Management in Education) in 2007. For more information see https://www.oercommons.org/.

open: A term used to describe any work (written, images, music, etc.) that is openly licensed and available to the general public to reuse. See *Creative Commons.*

2. "ethnocentristm," *Dictionary.com,* http://www.dictionary.com/browse/ethnocentrism (accessed December 11, 2017.)

OPEN Attribution Builder: A tool to help authors create attribution statements. It was built by the Washington State Board for Community and Technical Colleges and can be found at OPEN Attribution Builder.

open-copyright licence: A copyright licence that allows people to share, use, and edit the content of the work as long as they give credit to the original creator. See *copyright licence* and *Creative Commons licence.*

open educational resources: See *OER.*

Open Oregon Educational Resources: A group, also known as Open Oregon, that promotes textbook affordability for community college and university students and facilitates widespread adoption of open, low-cost, and high-quality materials for all of Oregon's public colleges and universities.

open peer review: A review where the peer reviewer's name, position, and institution are published along side the review. See *peer review.*

Open SUNY OER Services: An open access textbook publishing initiative established by State University of New York libraries and supported by SUNY Innovative Instruction Technology Grants. For more information see https://textbooks.opensuny.org/.

Open Textbook Network (OTN): An organization that helps higher education institutions and systems advance the use of open textbooks and practices on their campuses. It also maintains the Open Textbook Library. For more information see http://research.cehd.umn.edu/otn/.

Open Washington: An OER network and website dedicated to providing easy pathways for faculty to learn, find, use, and apply OER.

OpenEd Manitoba: See *Campus Manitoba.*

open textbook: A textbook that is released under an open-copyright licence, which permits instructors, students, and others to reuse, retain, redistribute, revise, and remix its content.

overchoice: See *choice overload*.

PDF (Portable Document Text): A file type designed to represent documents for easy reading, and is common format made available for downloading open textbooks.

peer review: A review of a book conducted by a subject-matter expert before or after publication. See *open peer review* and *subject-matter expert.*

plagiarize: "To steal and pass off (the ideas or words of another) as one's own, use (another's production) without crediting the source"[3]

platform: An online software system or website.

Pressbooks: An open-source platform based on WordPress used to create and edit books. (See the BCcampus Open Education *Pressbooks Guide* and the *Pressbooks Userguide*.)

print-on-demand copy: A printed hard- or softcover and bound version of a textbook made available through a printing service for which the reader pays a price typically set only for cost recovery.

proofread: The last stage of the copy-editing process. See *copy edit.*

public domain: A designation for works that are not restricted by copyright. They are owned by the public, which means that anyone is allowed to use these works without obtaining permission, but no one can own them.

Public Domain Mark: Used to "mark works already free of known copyright and database restrictions and in the public domain throughout the world"[4] See *CC0 (CC zero).*

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3. "plagiarize," *Merriam-Webster Dictionary,* https://www.merriam-webster.com/dictionary/plagiarize (accessed August 8, 2017).

4. "Public Domain Mark," *Creative Commons,* https://creativecommons.org/share-your-work/public-domain/pdm/ (accessed December 13, 2017).

public domain tools: Tools created to enable the "labeling and discovery of works that are already free of known copyright restrictions"[5]

Rebus Community: As group made up of faculty, staff, and students from post-secondary institutions and others from around the globe who support the work of open textbook authors and projects. Their talents include copy editing, proof reading, writing, and other skills.

recto: The front side of a page.

redistribute: One of the 5 Rs of openness. It signifies the right to share copies of the original content, your revisions, or your remixes with others.

reference list: A list of all resources cited within a textbook listed them alphabetically by the authors' last names.

remix: One of the 5 Rs of openness. It signifies the right to combine the original or revised content with other open content to create something new.

RDFa (Resource Description Framework in Attributes): A W3C recommendation that adds a set of attribute-level extensions to HTML, XHTML, and various XML documents for embedding rich metadata within web documents.

retain: One of the 5 Rs of openness. It signifies the right to make, own, and control copies of the content.

reuse: One of the 5 Rs of openness. It signifies the right to use the content in a wide range of ways and to continue using the content.

revise: One of the 5 Rs of openness. It signifies the right to adapt, adjust, modify, or alter the content itself. See *adapt*.

source statement: An optional statement that can be appended to an attribution statement that notes the type of source from which an open educational resource is curated, such as a museum collection. This is used when noting the source type is significant to the textbook subject matter. An example of a source statement is: *This image is available from the Toronto Public Library under the reference number JRR 1059.*

statement of rights: A statement that clarifies the rights permitted for a work by the copyright owner. See *copyright notice*.

style guide: A guide that outlines the elements that an author follows when creating or adapting a book, or other work such as spelling, word use, punctuation, citation style, measurements, and layout. See *APA, Chicago Manual of Style,* or *MLA.*

style sheet: A list or sheet that contains the elements of a book or other work that differ from the style guide. A style sheet can also list frequently used element styles for easy reference when copy editing and proofreading.

subject-matter expert (SME): An expert in the subject matter of a textbook who can provide a peer review prior to publication. See *peer review*.

URL: A web address. URL is short for Uniform Resource Locator.

Versioning History page: A record placed in the back matter of a digital book where minor corrections and updates are noted.

verso: The back side of a page.

write for hire: An individual who is paid to write but does not own the copyright of the work. The copyright belongs to the individual or organization who hires the writer.

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5. "Public domain," *Creative Commons,* https://creativecommons.org/share-your-work/public-domain/ (accessed August 2, 2017).

XML (Extensible Markup Languag): A markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable. An XML file is an editable, plain-text file that helps transfer content from one format to another. See *HTML*.

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Versioning History

This page lists major changes to this guide with each marked with a 0.01 increase in the version number. Because new information is continuously added to this guide, content updates do not appear on this page. Instead, a "Page added | Last update" textbox is posted near the bottom of each chapter. Additional files (e.g., PDF, ePUB) are provided upon request made to open@bccampus.ca

Version	Date	Change
1.0	February 20, 2018	Guide published.
1.01	May 2, 2018	For all Open Textbook Network logo references, changed "Open Textbook Network" when referencing chapters to the guide title, "Authoring Open Textbooks."
1.02	August 23, 2018	Appendix 4: Correction: changed titles for contract templates to title-case.
1.03	September 25, 2018	Appendix 1: Embedded "What are Creative Commons Licenses?" video
1.04	October 17, 2018	Removed references to Pressbooks Training webinars (discontinued Oct 10/18) and added info about Pressbooks Tutorial videos.
1.05	March 6, 2019	Introduction: Added *Working Group Guide* to list of BCcampus support resources, at bottom of page. Noted that the *Accessibility Toolkit* is now in its second edition.
1.06	May 21, 2019	Resources: Search and Find: Updated information on CC Search tool.
1.07	June 12, 2019	Theme changed from Open Textbooks to Clarke. This affected the general look and feel of this book.
1.08	July 11, 2019	Textbook Reviews: Updated broken links and added Embedding and Linking chapter (new)
1.09	August 7, 2019	Appendix 4: Added agreement template for students wish to publish course work with a CC licence.
1.10	October 1, 2019	ISBN for Print and eBook added. Versioning history number changed from 0.1 to 0.01.
1.11	May 28, 2020	Added links to copyright videos to "Fair Dealing and Fair Use" and "Resources: Only the Open."
1.12	June 25, 2020	Appendix 4: Added a photo/video subject release form for open textbooks Resources: Captions and Attributions: Added link to Media Attribution tool in Pressbooks
1.13	January 5, 2022	Transitioned guide from a static to an ongoing resource. • Added "page added" and "last update" dates to the end of each chapter. • Removed ISBNs
1.14	October 31, 2023	Updated cover image.
1.15	August 20, 2024	Corrected typo.

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