

**Jisc Institution as E-Textbook Publisher project**  
**Stages of e-textbook creation**

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**Stages of eTextbook Creation – the eTIPS project**  
by Laurence Patterson, Edinburgh Napier University

Between 2014 and 2016, we created and published, from scratch, two eTextbooks, aimed at helping students that were undertaking their research dissertation and research project, as well as their academics. Over that time, we crafted the ideas that began with a small group of academics, to blend with the professional work of editors, designers and educational specialists. We worked with in-house resources, and an evolving knowledge of tools and techniques, and structured a workable and accurate timeline of the stages we went through together. This is the story of that timeline.

We proposed a project timeline at the start of the eTIPS project (**Fig. 1**). This was more useful, with hindsight, as an indicator of the stages of the project itself, than of the production of eTextbooks, but it did offer us a visual representation of the series of activities through which colleagues would be required to work in order to bring publications together. It also permitted us to propose what the overall output from each activity would be, from a summary document, to be taken forward, to a proposed design, and to the final eTextbook. We understood that stage outputs would offer feedback to previous stages – for example, that peer review and proof-reading would inform content – and wrote this into our initial timeline.

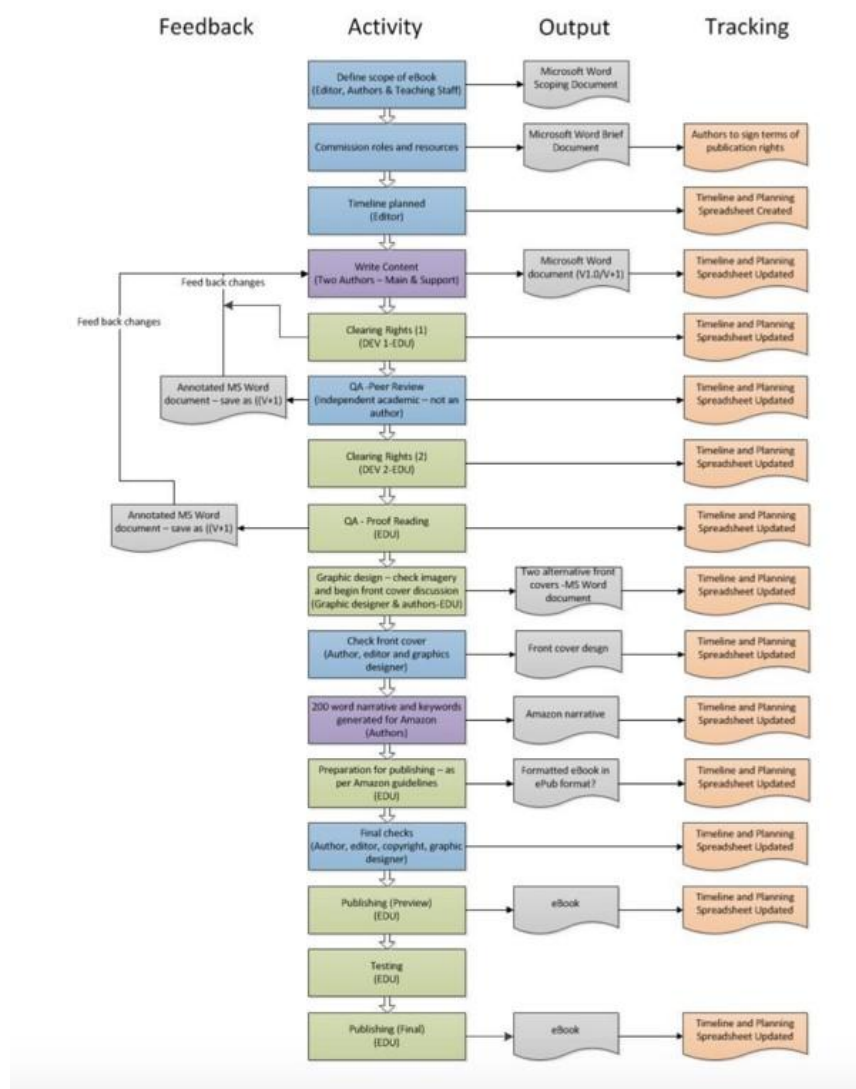


Figure 1 – eTIPS Project Timeline – April 2014

On reflection, this initial timeline indicated a broader range of activities, and was limited, in part, due to our understanding of the requirements of our distributing platform – Amazon, as well as our knowledge of our main production tool – Calibre. You're going to need to know exactly what a proposed eTextbook is about – to define its scope – before you should even think about hiring an editor, commissioning cover artwork, or slapping an ISBN on the item, ready for Amazon's Kindle marketplace. If you're eTIPS, you're going to need to spend at least two or three months doing this – but if you're a College or University commissioning work from your teaching body, your submissions process will look to capture as much information as it possibly can. Granted, your creative work – design, editing, and so on, can probably be tasked alongside the later editing stages of the eBook, but provide sufficient opportunity for the academics to present fully-formed thoughts about what the eBook will be about, and the team running the publishing side will feel clearer about what's to be achieved.

In late 2015, just as work began on the second eTIPS eTextbook, we created a production timeline (**Fig.2**) that we felt more would accurately reflect the work carried out, and which defined in further detail the stages to publication. The timeline was added to and revised as we went along. The new timeline can certainly be mapped to the old one, but it also offers further detail. It now recognised our understanding of the tools and the distribution platform required for our work. Importantly we

were now able to assign stages to individual project members, and indicate the approximate time required for each stage up to publication. This permitted us to look at cross-overs, where an author might have been involved in a design stage and vice-versa, and where stages might have occurred simultaneously. We are able to reflect on this, to understand the resource implications of the complete process, and to tighten these as we move forward for future publications.

eTIPS Timeline extract - book 2 write & publish				
Task Name	Duration	Start	Finish	Resource Initials
<b>Write book 2</b>				KS,FR GD
Write first draft of content	60 days	Mon 02/11/15	Fri 29/01/16	KS,FR GD
Source or create suitable copyright cleared illustrations	60 days	Mon 02/11/15	Fri 29/01/16	KS,FR GD,EDU
Graphic design (front cover, illustrations)	60 days	Mon 02/11/15	Fri 29/01/16	KS,ML,FR GD
Review content	25 days	Mon 04/01/16	Fri 05/02/16	KS,FR GD
Revise content	30 days	Mon 11/01/16	Fri 26/02/16	KS,FR GD
Source suitable copyright illustrations if required	30 days	Mon 11/01/16	Fri 26/02/16	KS,FR GD,EDU
Proof reading	10 days	Mon 08/02/16	Fri 26/02/16	EDU
Identify and write content for companion website interactions	109 days	Mon 02/11/15	Thu 31/03/16	KS,FR GD
<b>Publish book 2</b>				SC
Write narrative and keywords for Amazon Marketplace	5 days	Mon 04/01/16	Fri 08/01/16	KS,FR GD
Format for publishing	5 days	Mon 29/02/16	Fri 04/03/16	EDU
Accessibility checking	5 days	Mon 07/03/16	Fri 11/03/16	EDU
Prepare for publishing	2 days	Mon 07/03/16	Tue 08/03/16	EDU
Final checks	2 days	Tue 08/03/16	Wed 09/03/16	EDU
Publish	2 days	Thu 04/03/16	Fri 05/03/16	EDU
Amend and republish (if required)	3 days	Mon 08/03/16	Wed 10/03/16	EDU

Figure 2 – eTIPS Timeline – January 2016

Our writing of content for the second eTIPS eTextbook required a structured approach. The publication would assemble written content from a handful of academics (whereas our first eTextbook was largely the work of just two), whose schedules made it difficult to meet and discuss. Our progress summary document (**Fig.3**) iterated chapter themes and content, assigning authors, and setting deadlines for completion. We worked with a simple, but effective, green/amber/red system to indicate and update chapter progress. Through the coming months we continued to collaborate, the development team and authors, to the point of publication. Our artist made notes on possible illustrations for each chapter (**Fig.4**) and shared for discussion and, as the authoring of the publication reached its peak, cover artwork was discussed with authors, and a mindmap of ideas created (**Fig.5**).

	Chapter / Section	Comments	Who?	When?
1	Getting started with your research project		KS / FR	
1.1	Short introductory chapter to set the scene for the book, and outlining some of the key things to be considered in terms of the beginning of the process.	Needs to be written from scratch. Rationale for the structure of the book		
2	Introduction to research		GD	
2.1	- What is 'research'?	Done but needs to be given the correct 'voice'		
2.2	- Research perspectives and paradigms	Done but needs to be given the correct 'voice'	Methods and Methodologies	
2.3	- Research designs and approaches	From QI: Done but needs to be given the correct 'voice' From RMT: Needs to be re-written	GD?	
2.4	- Positioning your own research	Needs to be written. Probably a short section		
3	Laying the foundations for your project		FR / KS	
3.1	- Identifying your focus	Needs to be written. Probably a short section		
3.2	- Problem formation (refer to e-textbook 1 re: questions and hypotheses)	This section needs to emphasize the research question.		
3.3	- Identifying your subjects and sources	Needs to be written. Need to change term from subjects to participants- important for credibility of the book as a whole. Might be stuff from RMT currently used in 5.2.		
3.4	- Constructing a research plan (refer to e-textbook 1 here too)	Needs to be written. Probably a short section		
4	Ethical considerations		AW / FR / Napier	
4.1	- When to seek ethical approval	Done but needs to be given the correct 'voice'		
4.2	- Informed consent and participation	Needs to be written. Probably a short section		
4.3	- Anonymising subjects and sources	From RMT: Needs to be re-written		
4.4	- Storing, archiving, and disposing of data	Needs to be written. Probably a short section		
5	Quantitative research methods		MS to overview	

5.1	- Areas of application	From RMT: Needs to be re-written and not sure how relevant this actually is. Perhaps we want to rethink this sections so that the material is a better fit?		
5.2	- Sampling techniques	From RMT: Needs to be re-written. There is a section on questionnaire design in here which can be used elsewhere, perhaps. Also a bit on surveys (see 5.6). Some stuff on sampling which could go into 3.3		
5.3	- Scientific experimentation	Stuff in here now, but focused on variables and hypotheses. May need more.		
5.4	- Statistical research methods	From RMT: Needs to be re-written.		
5.5	- Observation and measurement	Unsure- maybe RMT		
5.6	- Surveys and survey design	Unsure- maybe RMT		
5.7	- Analytics	Unsure- maybe RMT		
5.8	- Working with quantitative data (practical exercises based on open data sets?)	Might be something in RMT but this will need to be changed. If SPSS is used, then this will be challenging as SPSS is out of date (its IBM something now) and is a UHI Citrix application.		
6	Qualitative research methods		KS to lead	
6.1	- Areas of application	From RMT: Needs to be re-written.		
6.2	- Interviewing and focus groups	From RMT: Needs to be re-written.		
6.3	- Ethnographic approaches	Needs to be written.	MS?	
6.4	- Phenomenological approaches	May have something in RMT but will be a short section. It may be in a section that is already used.	Napier?	
6.5	- Visual methodologies	Matt has something for this	MS	
6.6	- Discourse and content analysis			
6.7	- Working with qualitative data (practical exercises based on open data sets?)	This might be duplicating 8.2		

Figure 3 – Progress Summary – Writing the second eTextbook – January/February/March 2016

## Book 2

How to..... [Need to agree a final title]

### Chapters

1. Getting started with your research project
2. Introduction to research
3. Laying the foundations for your project
4. Ethical considerations
5. Quantitative research methods
6. Qualitative research methods
7. Mixed methods research
8. Data analysis
9. Understanding the relevance of your research
10. Writing up your research

### Suggested illustrations?

- Hand holding a stopwatch
- Hand holding notebook and pencil
- hand with trowel laying bricks
- Arm in a sling
- Hand counting on fingers
- Hand rubbing thumb & forefinger
- Palm up and palm down
- Hand drawing a graph
- Hand scratching head
- Hands typing at a keyboard

Figure 4 – Defining chapter illustrations for the second eTextbook – February 2016

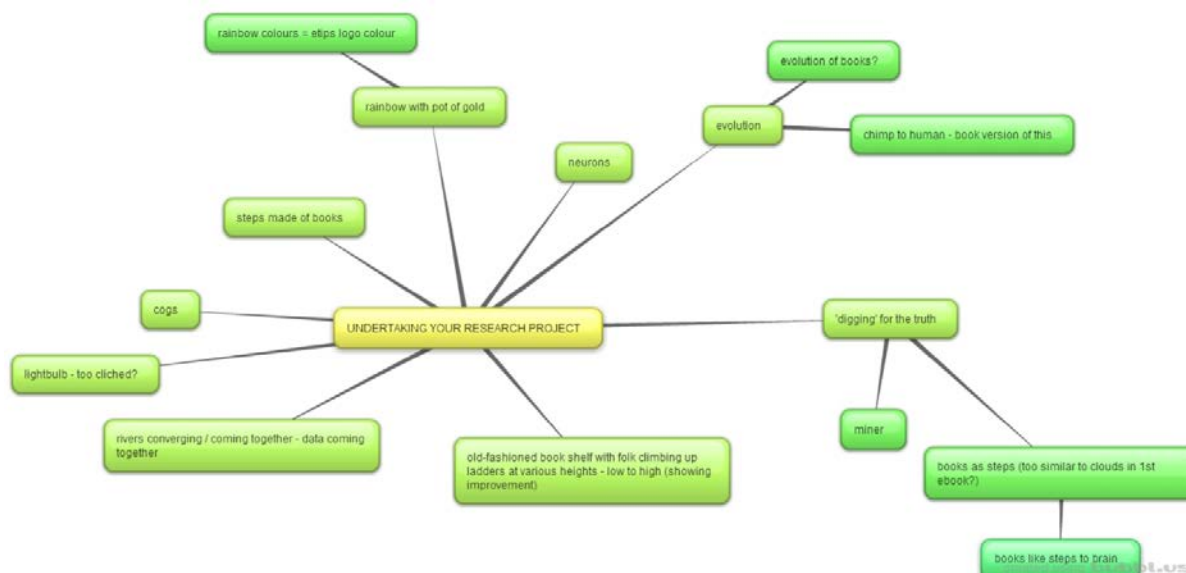


Figure 5 – Planning Cover Artwork for the second eTextbook – March/April 2016

We're proud of what we achieved over a small amount of time, our second eTextbook truly a collaboration of efforts, with a growing knowledge of technologies and techniques required for publication. The timeline has become an invaluable tool for us, and will continue to offer a structured narrative to our project work.

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### **The University of Nottingham's 6C model of Open Educational Resource Publication (OER)** By Steve Stapleton, University of Nottingham

The University of Nottingham's 6C model of Open Educational Resource Publication (OER). The 6C model (Figure 1) was first used at Nottingham in 2009 as part of the Jisc funded BERLiN project. The project manager for that project was Andy Beggan, and it was Andy who defined the 6C model to formalise the process that Nottingham used to create and publish Open Educational Resources (OER). The model remains in use at Nottingham as part of the OER publication model, and was adapted for use as part of the Jisc Collections funded ROME project to publish Nottingham's e-textbooks. The model would be easily adaptable to other institutions and other online content creation contexts, and has served Nottingham well over the years.

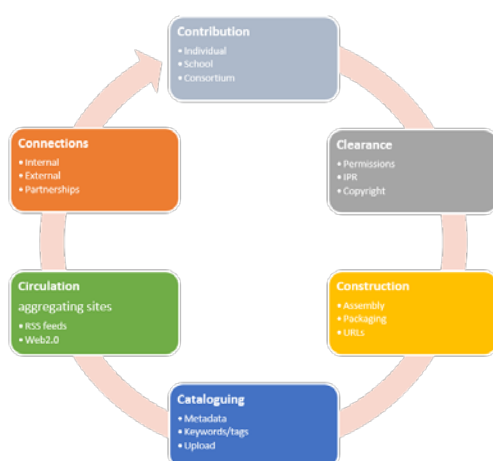


Figure 1 – The 6C model and how it was used to facilitate the creation and publication of the e-textbooks

#### **Contribution**

This phase of the model involves setting up processes to receive content into the team that will carry out the clearance and construction phases. For the institutions as e-textbook publisher project, the Department of Philosophy and Nottingham University Business School provided their manuscript content and supporting images to the Learning Technology Team. The Applied Ethics book was contributed as a word file which was text only. The Corporate Social Responsibility in Practice (CSRP) book was contributed as multiple word files, with supporting media and instructions for how to build the book.

#### **Clearance**

This phase of the model looks at rights clearance, copyright issues and any IPR requirements. The Learning Technology team assessed the manuscripts and supporting images for potential copyright

breaches; and where appropriate asked for clarification from the content providers to satisfy a number of copyright clearance categories:

- To ascertain if appropriate permissions had been secured for all third party content;
- To ensure that where openly licenced content was used, correct attribution of the work was provided;
- To ensure that where openly licenced content was used, appropriate licences had been selected.

## **Construction**

There are many approaches that can be taken in the construction phase. For the Applied Ethics e-textbook multiple versions of the e-textbook were created, some for distribution through the Smashwords website which allows readers to download e-textbooks in multiple formats; and one for distribution through the Apple iBook store which would contain many images and some interactive elements. The three main formats used were: iBook, Mobi, and Epub.

The content creation of the Corporate Responsibility Sustainability in Practice e-textbook somewhat followed the content creation and publication plan set out in the funding proposal submitted to Jisc. A plain text version of the e-textbook was authored by the academic team and passed to the Learning Technology team to construct the e-textbook. A number of videos, audio and interactive elements were also created by the academic team, and a number of third party sites and services were also suggested. The creation of the content was completed over a longer time period than originally planned and a number of different authors were allocated sections to work on.

## **Cataloguing**

The upload and metadata cataloguing was completed by the Learning Technology team. For the Applied Ethics book we were using third party sites and therefore. We did not consider following any specific metadata schema outside what was being asked for by the sites we were using to publish to. This is different to how our OER publication process works where we have taken the advice of the University's metadata and cataloguing team to define the schema.

For the CRSP book we included some limited metadata available in Xerte.

## **Circulation**

For the Applied Ethics e-textbook the circulation phase of the process was straightforward as the Learning Technology team were able to harness the distribution processes offered by both the Smashwords website and the Apple iBook store. These established platforms have clear paths to established markets.

For the CRSP e-textbook circulation was more difficult. Xerte does not have the same route to market as the established e-book platforms and therefore all work on circulation was and must be driven by the project team and particularly the academic team. This has been successful with over 6000 views of the material.

## **Connections**

Building connections is the stage of the 6C model that the project team have reached with both e-textbook titles. Building connections will focus on establishing connections both with groups

internally at Nottingham and external groups who may benefit from and be interested in using the e-textbooks. It will also focus on promotion work both internally and externally and will form a substantial piece of work for the remainder of the project.

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### **Nottingham Initial Project Plan (2014)**

Nottingham have identified three stages in the creation of their chosen e-textbooks. Further detail on the processes associated with each stage are explored in the next section.

Please note that the order in which these stages take place varies from institution to institution according to the business, licencing, destruction and technological models that they've chosen.

#### **Create**

- Plain text version of *Applied ethics* prepared
- Plain text version of *Corporate responsibility and sustainability in practice* prepared
- Interactive functionality incorporated into each title
- iBook version of *Applied ethics* prepared
- iBook version of *Corporate responsibility and sustainability in practice* prepared
- Multiple format versions created

#### **Produce**

- Rights clearance conducted
- QA and stakeholder sign off for both texts
- Testing of Smashwords versions
- Testing of iBook versions

#### **Publish**

- Both texts published on Smashwords
- Both texts published to iBook store
- Both books made available in MOODLE (except the iBook version of *Applied ethics*)
- Social media presence established
- *Corporate responsibility and sustainability in practice* will be made available to the ICCRS

#### **Project plan: processes**

Please note that the order in which these take place varies from institution to institution according to the business, licencing, destruction and technological models that they've chosen.

#### **Definition and commissioning**

- Identify authors
- Secure commitment from schools and academic authors to complete the work
- Secure authors to the project
- Define subject areas
- Define chapter numbers
- Define functionality
- Define the formats that the books will be offered in
- Define target audience(s) – both internal and external
- Define how students will be notified of the books availability
- Define business and licencing models

- Define pricing point and rationale for its choice
- Define staff time requirements
- Define non staff costs
- Define test plan
- Define dissemination strategy
- Define social media strategy
- Define publication strategy
- Identify the modules that the books will be used in
- Identify whether books will be core texts on the relevant modules or on the recommended reading list
- Identify numbers of students that will have access to the books
- Decide on revenue management – who receives the revenue generated by the books
- Define risk log
- Conduct SWOT analysis

### **Creating**

- Recruit technical support officer
- Create iBook versions
- Create .Doc versions for upload to Smashwords
- Adhere to Smashwords style guides to ensure placement in the premium catalogue
- Create interactive functionality
- Film and edit video content
- Identify appropriate functionality based on engagement with students and ICCSR
- Establish a sign off and QA process for each of the books
- Set up iBooks paid books account
- Purchase ISBNs
- Allocate ISBNs

### **Clearing Rights**

- Run copyright and creative commons workshops for authors
- Identify potential copyright infringements
- Identify rights holders
- Copyright clearance
- Find Creative Commons licenced replacements of images where possible
- Making permission requests to third party rights holders
- Establish a take-down policy for any copyright problems that are highlighted once books are published

### **Testing and Quality Assurance**

- Create test cases and test plan
- Identify who will conduct testing
- Sign off test plan
- Test each format (through Smashwords meat grinder software and iBook producer)
- Test each format with target audiences
- Proof read
- Sign off QA process

### **Publishing**

- Publish *Applied ethics* e-textbook to Smashwords who will then publish to multiple locations
- Publish *Corporate responsibility and sustainability in practice* e-textbooks to iBooks Store
- Implement freemium publication model for *Corporate responsibility and sustainability in practice*

### **Disseminating**

- Write communications plan
- Set up social media presence
- Set up blog and write blog posts
- Identify press release opportunities
- Attend conferences
- Engage with Jisc Collections and other Jisc Collections e-textbook partners

### **Embedding**

- Ensure that the published works are embedded within the relevant modules
- Ensure school staff members understand the potential use cases for each format that is available
- Support pedagogy decisions in relation to the use of the e-textbooks with students

### **Technology**

The following tools will be used to create the e-textbooks:

- Microsoft Word
- Apple iBook Author
- Adobe Photoshop
- Adobe Illustrator

The formats that will be made available for potential use by each e-textbook title are:

- ePUB
- iBook (.iba)
- mobi
- PDF
- RTF
- LRF
- PDP
- .text
- HTML

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## **Liverpool Initial Project plan (2014)**

### **Project plan: outline**

Liverpool have identified three stages in the creation of their chosen e-textbooks. Further detail on the processes associated with each stage are explored in the next section.

Please note that the order in which these stages take place varies from institution to institution according to the business, licencing, destruction and technological models that they've chosen.

### **Create**

Liverpool University Press (LUP) and the Centre for Lifelong Learning (CLL) are working with the authors to shape the e-textbook's content and scope.

## **Produce**

LUP will then copy-edit the text before it is loaded into the relevant software by library staff and typeset for the POD copies by LUP typesetters. The e-textbooks will be tested by Computer Services Department (CSD), CLL and also external reviewers engaged by LUP. They do not envisage any rights/permissions issues in view of the source material being generated in Liverpool.

## **Publish**

Both titles will be published as e-textbooks but will also be available as print on demand via Liverpool University Press.

## **Project plan: processes**

Please note that the order in which these take place varies from institution to institution according to the business, licencing, distribution and technological models that they've chosen.

## **Definition and commissioning**

The steering group has been established (further information can be found below), a business plan written and potential platforms chosen. A call for proposals was released within the institution in early 2014 and the e-textbook authors have been chosen.

## **Creating**

The authors are currently writing the text. This will be followed by peer review and further revisions. The texts will then be copy-edited and approved by the authors before being loaded into the chosen software. The POD versions will be type-set at this point as well.

## **Content creation and publication**

The content creation stage for the e-textbooks (*Essentials of Financial Management* and *Using Primary Sources*) has taken longer than originally anticipated due to a number of reasons. For *Essentials of Financial Management*, the author has found the process of updating the text for an open access audience as well as modernising the tables, graphs and exercises for online manipulation a more time-consuming exercise than previously envisaged. The author has therefore extended the content submission date to November 2015. Once the content has been submitted to Liverpool University Press, it will be copyedited and then handed to the E-Learning Unit and Computer Services Department at the University of Liverpool for integration on the Xerte platform. The author is working closely with the E-Learning Unit and Computer Services Department at the University of Liverpool at all times to ensure the content being created is suitable for the Xerte platform.

For *Using Primary Sources*, there have been a number of delays that have slowed down the content creation stage. The contracting of three subject editors and thirty contributors for the project has taken longer than anticipated due to fitting in with each individual's teaching, writing and research commitments. However, the majority of contributors have now signed a contract with Liverpool University Press for their sections and progress is well underway. It is now anticipated the majority of contributions will be available to Liverpool University Press for copy-editing and subsequent upload onto the Biblioboard platform by the end of 2015, with the public launch of the e-textbook by September 2016. The selecting, sourcing and uploading of images for the project is progressing very well and sample webpages of the e-textbook are beginning to take shape, helping with the development of the layout and structure of the e-textbook.

At this stage it is unknown whether the technology selected for the e-textbooks (*Essentials of Financial Management* is using Xerte; *Using Primary Sources* is using Biblioboard) will meet the expectations of the users, although they are highly anticipated to do so and we have no concerns at present about either technology.

With regard to Xerte and *Essentials of Financial Management*, colleagues at the University of Liverpool's E-Learning Unit and Computer Services Department have been involved in an upgrade of Xerte so the content can be shown in the new HTML 5.0 format. This ensures it is more suited for mobile devices and a range of operating systems, which was driven partly by the need for a more robust platform for the e-textbook, *Essentials of Financial Management*. The author and colleagues in the E-Learning Unit and Computer Services Department have also been working together to convert statistical data into a Web-viewable form, allowing the user to manipulate formulae based data. In addition to this, they have been working to ensure the statistical data was accessible on Xerte, using new templates they had made. At this stage in the process, the technology appears to be suitable for the e-textbook.

With regard to Biblioboard and *Using Primary Sources*, colleagues responsible for selecting and uploading material from the archives at the University of Liverpool Library have been very satisfied with Biblioboard and have found the team at Biblioboard easy to work with, answering questions quickly and dealing with queries professionally. Tutorials have taken place by colleagues at the University of Liverpool Library to the general editor and contributors of the *Using Primary Sources* e-textbook, and everyone is pleased with the technology to date.

As both e-textbooks have yet to be launched, we currently do not know if the format and functionality meets the needs of students and teachers. There will be a trial period for both e-textbooks to University of Liverpool students and teachers before the e-textbooks are launched open access. During this trial period, the e-textbooks will undergo rigorous testing of their content and functionality, and, following student and teacher feedback, the e-textbooks will be revised and updated accordingly before being launched open access.

In summary, the content for both e-textbooks is still in the creation phase and has not been submitted to Liverpool University Press for copyediting or for uploading on their respective platform. The contract for *Essentials of Financial Management* is signed with the author; 85% of the thirty contracts for *Using Primary Sources* have been signed with the remaining contracts expected in the coming weeks. For *Essentials of Financial Management*, content submission is expected in November 2015; for *Using Primary Sources*, content submission will begin in September 2015 and will be complete by the end of 2015.

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### **Liverpool Revised Project Plan (2016)**

E-Textbook 1: *Essentials of Financial Management* by Jason Laws

**Content creation:** Following the success of the bid for the *Jisc Institution as E-Textbook Publisher* project in 2014, a contract was issued by Liverpool University Press to Jason Laws for *Essentials of Financial Management*. The e-textbook is currently in the final writing stages and delivery of the complete manuscript is expected by the end of December 2016.

The content creation stage has taken far longer than anticipated due to a number of factors. First, the increased workload on the author who in addition to his teaching commitments is Chair of Undergraduate Examinations at the University of Liverpool Management School. The module the e-

textbook is being compiled for has increased from 729 students to 900 and the author is responsible for and takes all the lectures and workshops, as well as one to one feedback. Second, it became apparent to the author during the content creation phase that the students who will be using the e-textbook at the University of Liverpool and at Liverpool's partner institution in China, Xi'an Jiaotong-Liverpool University, have different prior knowledge of the topic. The author has therefore spent considerable time ensuring the e-textbook appeals to students at both institutions who have a range of financial management knowledge and understanding. Finally, the author's lecture notes, which form the basis of the book, relied heavily on material from the *Financial Times* and *Datastream*, which would not be possible to reproduce in an open source e-book. The author has therefore had to acquire new financial management data, graphs and tables that are available to use within an Open Access e-textbook and this has been a time constraint that was not originally anticipated at bid stage.

**Production:** On submission of the manuscript by the author to Liverpool University Press, the work will be professionally copyedited before being handed to e-learning librarians at the University of Liverpool Library for integration in to Xerte and upload on the University of Liverpool Library website. A cover for the e-textbook will be designed by a professional cover designer and the author will complete a marketing questionnaire for Liverpool University Press.

**Publication:** The e-textbook will be made available on the University of Liverpool Library's public website, which can be easily accessed by students at the University of Liverpool, Xi'an Jiaotong-3 Liverpool University as well as students and academics nationally and internationally. A link to the e-textbook will also appear on the website of Liverpool University Press.

In the first instance, *Essentials of Financial Management* will be promoted to University of Liverpool students in May 2017 for modules ACFI204 and ACFI304. Feedback will be gathered from the students by the author to ensure the e-textbook is working smoothly, with any errors quickly dealt with by e-learning librarians at the University of Liverpool Library. Alongside the evaluation by students, a review of the e-textbook will be managed by Liverpool University Press, acquiring feedback from external senior academics in the field.

The official public launch of *Essentials of Financial Management* will take place in September 2017 with Liverpool University Press managing the marketing and publicity of the e-textbook. A print on demand paperback edition is planned and work will commence on this once the feedback from the students and external reviewers has been integrated. The expected publication date of the print on demand edition is estimated to be March 2018.

**Reflections on work to date:** At this stage of the e-textbook development, the only aspect we would change is to factor in more support for the author, either in the form of leave from teaching duties or the funding of an assistant to help with the content creation. E-learning librarians at the University of Liverpool Library have in the interim familiarised themselves with the Xerte software and are confident the e-textbook can be created in time for release in May 2017.

E-Textbook 2: *Using Primary Sources* edited by Jon Hogg

**Content creation:** Following the success of the bid for the *Jisc Institution as E-Textbook Publisher* project in 2014, contracts were issued to the general editor (Jon Hogg), sub-editors and contributors for *Using Primary Sources*. However, various changes took place within the first six months as one sub-editor left the University of Liverpool and another went on maternity leave. At bid stage, it was proposed there would be 30 chapters within the collection. As 15 academics had agreed to contribute a chapter at bid stage, extensive work was undertaken by the general editor to

commission additional academics to write chapters in specific gaps. By mid-2015, 26 chapters by 31 academics had signed up to the project.

Content creation continues to progress well with the majority of text close to completion and the primary source identification and scanning at an advanced stage. The content creation for *Using Primary Sources* involves the contributors writing a chapter on their primary source theme (such as the body, environment or trade) and searching for related primary source material within Special Collections and Archives at the University of Liverpool Library to support their chapter. Colleagues within Special Collections and Archives have helped the academics extensively by finding suitable material on their behalf and making digital reproductions of the material using specialist scanning equipment. This has been a lengthy process as much of the primary source material is rare and fragile to handle. The digital reproductions of the primary source material are then saved on to a shared drive and uploaded onto the BiblioBoard platform by librarians at the University of Liverpool Library and the general editor once the corresponding chapter by the contributor had been completed, reviewed by the general editor, revised, copyedited and typeset. In a number of cases, the contributors have required primary source material from external institutions and this has been sourced by Special Collections and Archives. The permission fees for all external material and the specialised external scanning that has been required for some of the documents has been managed by Liverpool University Press and funded from the savings made from fewer sub-editors and contributors being contracted to the project.

**Production:** copyediting and typesetting has begun and the primary source identification and scanning is at an advanced stage for the majority of chapters. One chapter ('Memory') is complete and the primary source material plus the corresponding ePub chapter has all been uploaded on to BiblioBoard. Once the majority of the chapters and primary source material has been completed and uploaded, the general editor will complete a marketing questionnaire for Liverpool University Press.

**Publication:** The *Using Primary Sources* e-textbook will be made available on the BiblioBoard website, which can be easily accessed by students at the University of Liverpool, Xi'an Jiaotong-Liverpool University as well as students and academics nationally and internationally. Links to the e-textbook on BiblioBoard will appear on the University of Liverpool Library website, its reading list system and via the Library's catalogue and discovery system as well as on the website of Liverpool University Press.

In late-September 2016, *Using Primary Sources* will be promoted to all University of Liverpool history academics and undergraduates as well as other academics in the School of Histories, Languages and Cultures at the University of Liverpool who would benefit from using the e-textbook. Feedback will be gathered from the students by the general editor and academics to ensure the e-textbook is working smoothly, with any errors quickly dealt with by the general editor and e-learning librarians at the University of Liverpool Library as well as BiblioBoard. Alongside the evaluation by students, a review of the e-textbook will be managed by Liverpool University Press, acquiring feedback from external senior academics in the field.

The official public launch of *Using Primary Sources* will take place in January 2017 with Liverpool University Press managing the marketing and publicity of the e-textbook. Three print on demand paperback editions are planned and work will commence on these once the feedback from the students and external reviewers has been integrated. The expected publication date of the print on demand editions is estimated to be September 2017.

**Reflections on work to date:** The main reflection on work to date is how vast a project creating the *Using Primary Sources* e-textbook has been and continues to be, involving many people from the

University of Liverpool, University of Liverpool Library and Liverpool University Press, all of whom are doing extensive work to ensure it meets the needs of students and academics.

One challenge during the content creation stage has been encouraging the 31 contributors writing the 26 chapters for the e-textbook to meet submission deadlines. This is a perennial problem in the world of publishing and whilst all contributors have considerable enthusiasm for the project, prioritising the writing of the chapter and primary source material search and selection over teaching and administrative duties as well as their own research and writing has been an issue.

A further challenge has been the digitisation of the primary source material, which is a lengthy process carried out by expert archivists working in Special Collections and Archives at the University of Liverpool Library. Digitising rare and fragile documents is undoubtedly challenging and a number of issues have been encountered over the last year. For example, the fold from the spine on pamphlets and rare books has meant some of the text disappeared in the middle, a problem that could not be resolved without breaking the spine of the publication, which we did not undertake due to the rarity of the primary source publication. Other documents have been too fragile to scan, or the material is illegible due to writing or marks on the reverse. All these problems have been overcome by either selecting alternative material, searching whether the material has been digitised elsewhere by another library or archive, improving the digital copy by using image manipulation software and in some cases using external specialised scanning equipment to make a suitable digital copy.

Another reflection has been the platform chosen for the e-textbook. BiblioBoard is an excellent curating and archive platform that is used by many libraries, museums and galleries, including the British Library, to create digital collections of their archives. In many ways it has been ideal for *Using Primary Sources*, allowing us to create a rich and attractive collection of primary source material for students and academics to access digitally on campus as well as remotely. However, a number of elements required for the e-textbook were not initially possible and the BiblioBoard team in the US have been working closely with the University of Liverpool to develop the platform further and ensure it can fulfil our requirements. An example of this is allowing the chapter to be published within the collection as an ePub file so links can appear in the chapter to the primary source material within the collection. Originally this was not possible as the chapter was being converted into an image file that would not allow embedded links. BiblioBoard have worked on this with the University of Liverpool over the last ten months and ePub chapters are now possible, allowing embedded links to the primary source documents within the chapter. Other elements that have been resolved include allowing the collection to be Open Access to all rather than Open Access only to institutions subscribed to BiblioBoard and to ensure the links to the collection are stable permalinks. Realising the strengths and limits of BiblioBoard as the e-textbook progresses through the production stage and working out solutions has been work intensive. Issues that cannot be resolved by BiblioBoard have required new thinking in the way the material is created by the contributor or uploaded by the general editor. For example, the labelling of the primary source material has been given considerable thought to ensure the documents are arranged in a corresponding order to the chapter and appear in keyword and thematic searches. This is being resolved by ensuring each document is prefixed by [A], [B], [C] to ensure they are arranged in an order that relates to their discussion in the chapter. Extensive indexing work is also taking place to ensure each document contains the necessary keywords required so they appear in relevant internal searches of the collection.

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### **The Stages of E-Textbooks Creation**

by Jaimee Biggins, Managing Editor, UCL Press

UCL Press chose *Key Concepts in Public Archaeology* as its second e-textbook with Jisc as part of the 'Institution as e-textbook publisher project'. Initially UCL Press had planned for the book to go through the traditional production processes and simultaneous publication of print and online formats. However, during production this was re-assessed partly because of the delayed delivery of some of the chapters in the manuscript – unfortunately a common issue in multi-author edited volumes. As the General Editor had submitted the bulk of the chapters UCL Press chose to follow an online-first model and launch several chapters on the UCL Press digital platform. As *Key Concepts in Public Archaeology* is an edited collection, with each chapter covering a specific aspect of public archaeology, the chapters can be read quite independently and do not necessarily need to be presented in a linear format.

UCL Press is an open access publisher of scholarly monographs, textbooks and journals. Books are produced in all formats (open access PDF, hardback, paperback, epub, mobi as well as html). The html-based UCL Press digital platform offers an innovative way for UCL Press content to be read. It does this through three different formats – enhanced editions with audio/visual elements, monographs with scholarly functionalities such as the ability to note-take, highlight and share chapters and BOOCS (Books as Open Online Content), which are 'living books' with content being added to over time. Public archaeology is an emerging and rapidly growing field of study and therefore there is potential for more chapters to be commissioned in future – these can easily be added to the online version over time, rather than having to wait to produce a full new edition.

The development of the UCL Press platform can be seen in the context of the Academic Book of the Future project. This was a two year AHRC-funded research project (2014-16) run by a core project team from UCL and King's College London, and led by Dr Samantha Rayner, the Principal Investigator (UCL), which looked at how scholarly work in the arts and humanities will be produced, read, and preserved in coming years and asked key questions such as 'what is the nature of an academic book?', as well as exploring new technologies for the book. The project investigated the academic book in its current and emerging contexts, from a range of perspectives (including academics, librarians, publishers and booksellers), and considered a variety of issues – from open access to the REF (Research Excellence Framework), to the future of academic bookselling and academic libraries, and more.

One of the project outcomes was the Academic Book of the Future BOOC, which features contributions connected to the project including blog posts, videos and articles. The discussion remains current and dynamic as articles can be added to the site over time, and the platform allows different ways to explore and share the ideas and discussions. UCL Press plans to expand the BOOC model in the future.

The full report on the Academic Book of the Future project was published in Spring 2017. Among the findings, it identified that enhanced, experimental book formats will continue to grow as a publishing output, alongside print, and by publishing *Public Archaeology* online, in a format that can be added to over time and that can include multimedia, UCL Press has offered a format that pushes the boundaries of the traditional book.

In terms of production, *Key Concepts in Public Archaeology* required a slightly different workflow from a standard monograph, and the sequence of production stages had to be re-ordered. As with all UCL Press books we followed an XML workflow and had it tagged by our typesetter with XML codes at the outset (before copyediting). An XML workflow enables content to be multi-purposed and used for a variety of formats such as epubs or html versions. After copy editing the files were

passed to our typesetter who generated XML, which was then sent to our digital developer for ingestion onto the digital platform. Once ingested we spot checked the content on-screen to ensure no errors had crept in during ingestion. We then typeset at the very end of the process when all chapters had been delivered by the General Editor, to create a final PDF and book with prelims and index. This differs to the normal process where typesetting and page proofs stages of the book occur before publication, and the author and proofreader do a check of the complete PDF page proof which is paginated and a replica of the final printed book. In the workflow for this book it went from copyediting to XML, rather than copy editing and typesetting of a complete PDF and proofing.

Although the delays on this book were unfortunate it did enable UCL Press to develop a more flexible online-first format for edited collections. UCL Press will continue to develop this model in the future and may proactively offer this route to authors from the outset if a book is believed to have potential to grow over time.