

TidBITS Publishing Inc.

Take Control of

vl.1

iBooks Author

Michael E. Cohen

**PLAN!
PRODUCE!
PUBLISH!**

\$15

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Read Me First

Welcome to *Take Control of iBooks Author*, version 1.1, published in March 2013 by TidBITS Publishing Inc. This book was written by Michael E. Cohen and edited by Tonya Engst.

This book introduces you to iBooks Author, Apple’s software for creating and publishing what Apple calls “Multi-Touch books.” Although iBooks Author was specifically designed with textbook publishing in mind, *Take Control of iBooks Author* shows you how to conceive, plan, produce, and publish Multi-Touch books for a variety of uses and audiences.

Discounted [classroom and Mac user group copies](#) are available.

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Updates and More

You can access extras related to this ebook on the Web (use the link in [Ebook Extras](#), near the end; it’s available only to purchasers). On the ebook’s Take Control Extras page, you can:

- Download any available new version of the ebook for free, or buy any subsequent edition at a discount.
- Download various formats, including PDF, EPUB, and—usually—Mobipocket. (Learn about reading this ebook on handheld devices at <http://www.takecontrolbooks.com/device-advice>.)
- Read postings to the ebook’s blog. These may include new tips or information, as well as links to author interviews. At the top of the blog, you can also see any update plans for the ebook.

If you bought this ebook from the Take Control Web site, it has been added to your account, where you can download it in other formats and access any future updates. However, if you bought this ebook elsewhere, you can add it to your account manually; see [Ebook Extras](#).

Basics

Here are a few “rules of the road” that will help you read this ebook:

- **Links:** All blue text in this ebook is hot, meaning you can click (or tap) it, just like a link on the Web. If you click a link to switch to a different part of the ebook, you can return to where you were with a shortcut, if your ebook reader offers a “back” feature. For example, if you use iBooks in iOS to read the EPUB version of this ebook, you can tap the “Back to” link at the lower left of the screen. Or, if you use Preview on the Mac to read the PDF version of this ebook, you can choose Go > Back or press Command-[.
- **Menus:** Where I describe choosing a command from a menu in the menu bar, I use an abbreviated description. For example, the abbreviated description for the menu command that displays the Styles drawer in iBooks Author is “View > Show Styles Drawer.”
- **Path syntax:** This book occasionally uses a *path* to show the location of a file or folder in your file system. For example, the path [~/Library/Application Support/iBooks Author/Templates/My Templates/](#) leads to where iBooks Author stores any templates you create (the ~ means that path starts in your Home directory).

Note: In Mac OS X 10.7 Lion and above, the Library folder in your Home directory is hidden by default; see [Save a Template](#) to learn how to access it.

- **Tapping:** I sometimes mention tapping an item on the iPad screen, such as “tap the thumbnail image.” To *tap*, quickly put your finger on the item and then release your finger.
- **Rotate:** Rotating involves turning the entire iPad 90 degrees, which shifts the onscreen display between the portrait (tall) and the landscape (wide) orientation.

What's New in Version 1.1

This 1.1 version of *Take Control of iBooks Author* takes into account the changes and enhancements in iBooks Author 2.0 (see Apple's Support document "What's new in iBooks Author 2.0," at <http://support.apple.com/kb/HT5478>). The most notable revisions in the ebook are these:

- In [Import Text](#) I added information about how to use section breaks in an imported document so that it imports as multiple chapters or sections, plus I now provide more details about importing from Pages or Word. I also added more help in [Importing Tips](#).
- In [Choose a Template](#), I have taken into account the expanded range of templates in iBooks Author 2.0 and discussed some of the specialized templates that are now included. In particular, I describe the new Portrait Only templates in [Choose between Portrait and Landscape Templates](#). In addition, I now refer to the portrait view in the original landscape templates from iBooks Author 1 as the "alternate portrait view" to distinguish it from the Portrait Only template.
- Several options available when you [Customize the Opening](#) have changed. The removal of the audio option and the expansion of video formats for Intro Media is documented in [Change the Intro Media](#). [Change the Table of Contents](#) now takes into account Portrait Only templates.
- iBooks Author 2 adds the ability to create new chapter, section, and page layouts; I talk about those in [Modify the Layouts](#). iBooks Author 2 also subtly modifies how much you can customize the alternate portrait layouts in a Landscape with Portrait template: I discuss that in [Change an Alternate Portrait Chapter Layout](#) and [Change a Section Layout](#).
- In [Lay Them Out like Widgets](#), I describe the new Make Full Screen on Tap option for images, shapes, and other objects and how it affects the alternate portrait view.
- I point you to information about adding complex mathematical equations with MathML and LaTeX in [By the Numbers](#).

- iBooks Author can now use any audio and video format that QuickTime supports in its Media widget, so I've removed information about converting media from [Add Video and Audio](#), since iBooks Author now does that for you. I also describe the new presentation options for audio-only Media widgets in that section.
- [Add Interactive Presentations](#) now covers how to [Add Scrolling Sidebars and Pop-Overs](#) and updates the descriptions of the other widgets.
- The workflow for publishing books has been streamlined (see [Prepare an iTunes Store Package](#)), and a method of distributing books, Apple's iTunes U, has become more open (see [Consider iTunes U](#)).

Introduction

Introduction from Version 1.0

Near the beginning of the final decade of the Twentieth Century, I found myself working at a small publishing company housed in a condemned building on the Pacific Coast Highway in Santa Monica, California. I was part of a small group called the Expanded Books team, and our mission was to make the first mass market ebooks. To be sold on floppy disk. To be read on 5-pound computers with dim 640 by 400 resolution monochrome screens. We all wore black-and-white “Text: The Next Frontier” T-shirts, and we felt that we were inventing the future.

We were. In their heyday, the Voyager Expanded Books were award-winning hits and the talk of the publishing world. Voyager even wrote a toolkit so other publishers could produce Expanded Books. The possibilities seemed limitless for long-form digital text.

But by mid-decade it all went pear-shaped. Apple, which produced the software and hardware on which most Voyager products depended, began spiraling into a near-death experience, while at the same time a comet slamming into Jupiter helped propel the World Wide Web into world-wide popularity. Long-form, carefully designed ebooks were out, and short-form, loosely interconnected assemblages of Web pages were in. Ebooks survived, but just barely, a backwater of the publishing world that few observers regarded as being relevant.

Finally, some ten years later, Amazon’s Kindle re-ignited interest in ebook publishing, and the reborn-and-on-a-roll Apple introduced a device called an iPhone that redefined what a handheld device was. After that came the iPad and its iBooks app, and suddenly ebooks were hits again and the talk of the publishing world once more.

The irony was that the ebooks of 2010 were barely more advanced in terms of features and usability than were the original Expanded Books of fifteen years earlier. In some ways, they were even less advanced.

However, early in 2012, Apple introduced a digital book production tool, iBooks Author, and an ebook format that provided capabilities far beyond what the current standard ebook formats could provide.

Although iBooks Author was specifically designed for producing textbooks, it became immediately clear to me that long-form digital text was finally moving beyond what the Expanded Books could do, and that the ebook future was looking bright again. I was excited and delighted.

Now the circle is complete: back in the days when ebooks were being born I wrote the user guide for the original Voyager Expanded Book Toolkit, and now, twenty years later, here I am writing a user guide for its Twenty-First Century descendent. Time for a new T-shirt:

Text: The Next Frontier Redux

One year later. . .

Since I wrote the preceding, Apple's foray into interactive book publishing seems to be flourishing: a look at the "Made with iBooks Author" section of the iBookstore shows hundreds of books of various types and genres. At the same time, the number of devices capable of displaying Multi-Touch books created by iBooks Author has grown enormously; to date Apple has sold well over 100 million iPads, and the pace seems to be accelerating. Ebooks in general have completely disrupted the traditional publishing industry, and self-published books have become a force to be reckoned with.

With the release of iBooks Author 2, Apple has taken an already powerful and polished tool for making interactive ebooks and improved it significantly. Certainly, iBooks Author is not the only ebook game in town, and Apple's iBookstore is not the only playground, but if you are at all interested in producing an interactive ebook, it's become an even better place to start.

iBooks Author Quick Start

Take Control of iBooks Author is presented in the same sequence you would typically follow when creating an iBooks Author ebook. However, there is no harm, and often great benefit, to jumping around so that you can explore or inform yourself about a particular topic. Use this Quick Start as your roadmap to the ebook-production landscape.

Understand Textbooks:

- See [What Is a Textbook?](#) to find out what makes a textbook a textbook and how iBooks Author is designed for building them.
- Learn [How to Think about Your Book](#) to understand the relationship between its main textual spine and its illustrative and interactive contents.

Plan Your Project:

- You should not only [Assemble the Outline](#), but start to [Collect Your Assets](#), making sure to [Be on the Right Side of Rights](#).
- It doesn't just happen; you have to [Plan for Interactivity](#), using the widgets that iBooks Author provides.

Put It Together:

- First, [Choose a Template](#), and then, to give your book a custom look, learn how to [Customize a Template](#), including how to [Customize the Opening](#) and [Modify the Layouts](#). Then [Save a Template](#) so you can use it for other books.
- The text is the thing: understand how to [Format and Flow](#) text and [Import Text](#), and decide if you want to [Compose in the Shell](#).

Accessorize:

- [Learn to Wrap](#) so that text and non-text items can live together on the same page, and see why it helps to [Lay Them Out like Widgets](#).
- [Add Images, Shapes, Tables, and Charts](#) to illustrate your text; [Add Video and Audio](#) to bring it to life, and then [Add Interactivity](#) for the ultimate in reader participation.
- iPads can rotate and so can your book, so don't forget to [Flip It for a Different View](#).

- [Add Study Questions \(and Answers\)](#) to help your book's readers remember what they've read, and [Cross Reference Your Book](#) to help them find their way around.
- Give your readers additional information when you [Create and Organize a Glossary](#) with the Glossary feature. Bonus: you can also use it to [Create Indexes](#). (Sound confusing? Not if you [Learn How the Glossary Works](#).)

Expose Yourself:

- Before you let your book walk out the door, [Fine-Tune the Table of Contents](#), [Preview Your Book](#), and [Make Advance Reading Copies](#).
- Finally, get down to business and [Obtain an ISBN](#). Then, wrap it all up when you [Set Up an iTunes Connect Account \(If You Need One\)](#) and [Prepare an iTunes Store Package \(If You Need One\)](#).

Understand the Format

iBooks Author 2 is a polished, powerful tool that almost anyone can use to create attractive, sophisticated, interactive ebooks. Nonetheless, it has some limitations and shortcomings.

Among iBooks Author's shortcomings and limitations are these:

- iBooks Author 2.0 produces ebooks that can be read only on iPads (including the iPad mini) using iBooks 3.0 or later.
- iBooks Author requires a Mac running Mac OS X Lion 10.7.4 or above.
- The iBooks Author license agreement stipulates that you can sell books produced by iBooks Author only through Apple's iBookstore.

If none of these is a deal-breaker for you, you still need to figure out if iBooks Author is the right tool for building *your* interactive ebook, and to do that you need to understand what kinds of ebooks it was specifically designed to create, and what kinds of features it offers for creating them.

What Is a Textbook?

iBooks Author was designed to create not just any kind of ebook, but a particular type of book: specifically, the ebook equivalent of a *textbook*.

Ah, but what *is* a textbook? Even taking into account that in your student days you spent a lot of time reading them, carrying them around, and scribbling in them, your student experience of textbooks probably never led you to think about what they are in terms of what it takes to devise them, produce them, and sell them.

Here are some of the characteristics of textbooks that, as an aspiring textbook author or publisher, you need to understand:

- **Textbooks contain course materials:** That is, most textbooks are associated with a course taught in a class by a teacher, and they contain much of the subject matter of that course. Moreover, those materials are arranged in the textbook in such a way that a teacher can pick from among them to build a well-ordered curriculum

consisting of daily or weekly assignments. Therefore, textbooks usually contain many discrete identifiable sections, each of which is designed to be used as the basis for a lesson or group of lessons. Bottom line: textbooks, no matter the subject, all tend to be built using a common set of simple structural elements.

- **Textbooks contain much more than plain text:** Belying its name, it is a rare textbook that doesn't include pictures, figures, charts, and other graphic materials along with the text, and, in some cases, even overshadowing the text. Textbooks generally are much more media-rich than the typical fiction or nonfiction book that is marketed to the general public.
- **Textbooks are adopted, not sold:** Even if students buy their own textbooks, they don't usually get to choose which textbooks they purchase: that decision typically is made by someone else. That someone else could be a bunch of people, such as a committee authorized to make textbook selections for a school district, or it could be a single individual, such as a professor teaching a college course.

iBooks Author is tailored to build ebooks—Apple calls them *Multi-Touch books*—that align with these textbook characteristics as closely as possible.

Multi-Touch books can:

- **Provide structured curricular materials:** Each Multi-Touch book template in iBooks Author creates books that are divided into chapters, with chapters divided into sections (**Figure 1**). The sections and chapters are numbered by default, the way most paper textbooks are arranged. See [Choose a Template](#) for more details about the textbookish structural elements provided by an iBooks Author book template.

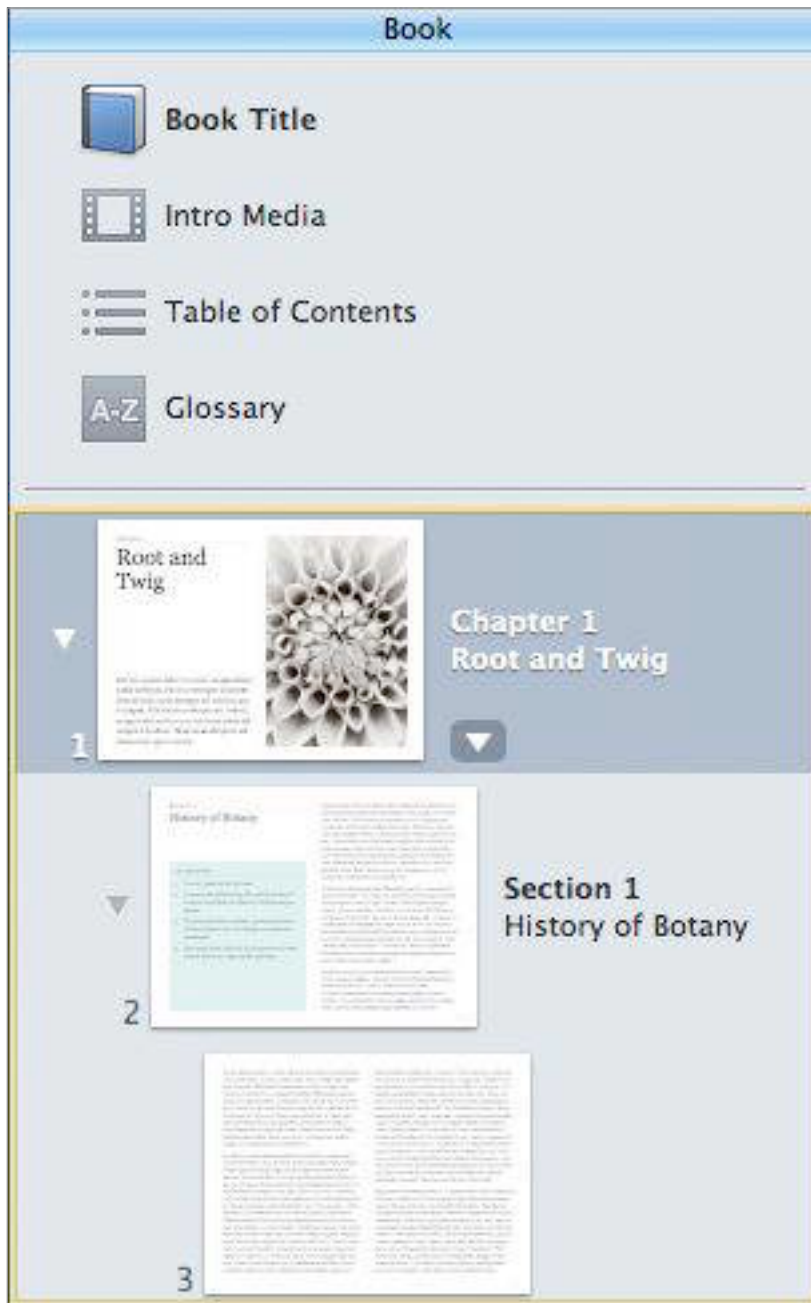


Figure 1: iBooks Author provides a common Chapter/Section structure for textbooks, along with other standard textbook elements.

- **Support complex graphic materials and layouts:** Every template has placeholder art that you can replace to provide custom page art. You can also add sidebar texts (described in [Format and Flow](#)), and a wide variety of graphic and dynamic elements, such as video and animations; read [Add Your Assets](#) for more. And if that isn't enough, iBooks Author provides tools for building interactive review questions; see [Add Study Questions \(and Answers\)](#).

- **Be adopted by individual classes or larger instructional organizations:** Apple provides distribution channels for the Multi-Touch books that iBooks Author creates. iBooks Author can link you directly to the iTunes Connect software service that you use when you publish and distribute Multi-Touch books via the iBookstore—see [Set Up an iTunes Connect Account \(If You Need One\)](#). Apple has also added the capability to distribute Multi-Touch books along with other course materials to its iTunes U service (see [Consider iTunes U](#)).

Apple has designed both of these distribution channels to work with academic institutions: the iBookstore with a volume discount plan for schools to purchase ebooks, and iTunes U for hosting free materials online for classes.

But the Multi-Touch books that iBooks Author produces can be used for ebooks other than textbooks. You could build a catalog, or a cookbook, or even a media-rich novel. In fact, a quick look at the “Made with iBooks Author” section in Apple’s iBookstore shows a variety of non-textbook titles: movie books, art books, travel guides, cartoon collections, children’s books, and many others kinds of multimedia books. Nonetheless, what iBooks Author’s tools and capabilities were designed to do is to build textbooks.

How to Think about Your Book

Unlike Mr. Loopner, the never-seen early *Saturday Night Live* character who was born without a spine, Multi-Touch books do have a spine, and that spine is made of text. That is, each page contains text boxes through which text flows from one box to the next and from one page to the next, no matter what the template. Although, as I have said, textbooks can, and almost always do, contain much more than text, it is the flowing text that is the core of a textbook, the spine from which all of those other elements—videos, figures, interactive quizzes, tables, and sidebars—hang (**Figure 2**).



Figure 2: Imagine your book as a text spine with images and other elements hanging from it.

Multi-Touch books may be interactive, but they are, at bottom, very linear. They consist of linear sets of text-containing pages, arranged into linear sets of sections within linear sets of chapters, and, by default, iBooks Author consecutively numbers those pages, sections, and chapters automatically (though you can override it).

To put the icing on the linearity cake, iBooks Author also will automatically number the figures, tables, and any other items that you've hung from the text spine. Those non-text elements, in other words, have a linear order of their own, and that order is based upon where they hang from the linear text spine. The spine holds them all together.

Don't fight it: *If you try to produce a sprawling, multi-branching hypertextual or hypermedia work, iBooks Author will resist you every step of the way. Don't fight the linearity. Embrace and exploit it.*

When you think about it, linearity makes practical pedagogical sense: the last thing a student needs when confronted with a tome of completely unfamiliar information is to also have to figure out an unfamiliar system for getting at that information. The linear structure of a textbook, whether paper or Multi-Touch, is a stable structure, a *comfortable* structure, something solid on which a student can rely as she explores unfamiliar concepts and facts.

Linearity is comfortable for the teacher, too, and it's convenient. Teachers can make assignments by page number, chapter number, or section number, rather than having to describe to students how to use the software to access the materials for the assignment.

Most importantly, from your point of view, is that you don't have to devise an interface to present your content: you have one, and it's one that works and that has worked for thousands of years. Instead, all you need to do is figure out the best linear arrangement for the materials you want to present. And that is no small task, because how a subject maps to a linear presentation is not always obvious, and the mapping can sometimes be arbitrary.

Consider these examples of types of textbooks and their organizing principles:

- **History textbooks:** This is a simple case, since these are usually presented in chronological order of historical events.
- **Math textbooks:** These tend to have an obvious inherent linear structure, moving from basic concepts to more advanced ones.
- **Biology textbooks:** These also tend to arrange themselves from basic to more advanced topics, but what is “basic” and what is “advanced” is less obvious. Do you start with cells and move up to larger organisms? Start with DNA and go from there? Start with abstract concepts (species, phyla, families, and so on) and move to specifics? The writers of this kind of textbook usually create some sort of narrative structure, their “story of biology,” and then arrange their topics within that narrative.

- **Catalogs:** These aren't textbooks, per se, but they're easy to make in iBooks Author, and some textbookish things (e.g., lexicons, map collections) are catalog-like. Here you can use various linear organizing principles: alphabetical, directional, and so on. The best ones are the ones the reader has to think the least about.

The lesson to take from the preceding discussion is simple: to make the best use of iBooks Author, you need to visualize the subject matter you want to convey as a linear presentation that consists of both a central text and various non-textual elements attached to that central text.

Not that hard, really. Until you get into the details... where you-know-who lives.

Plan Your Book

One problem with iBooks Author is that it's enticing: you can quickly use it to bang together a good-enough looking Multi-Touch book with not much effort, and, what's more, it's loads of fun to do. The temptation to dive in to build your book and, in the process, to play with all the software's whiz-bang features can seem irresistible. Resist it.

Your book will be much better, and you'll have a much better chance to *finish* your book, if you take time at the beginning to map out what you'll be doing and to get all your virtual ducks in a row.

This chapter looks at the admittedly unexciting but essential steps you should take before starting book production: making an outline (described just below), how to [Collect Your Assets](#), and how to [Plan for Interactivity](#).

If you want to play the game, it helps to have a game plan.

Assemble the Outline

As a matter of full disclosure, I have to tell you: I hate writing outlines. When I had to do it as a student because it was part of a paper assignment, I often faked the outline, writing it after I had already composed much, if not all, of the final paper.

When I eventually came to write books for people who would give me money to do it, I discovered that I wouldn't get *any* money for a book project if I didn't have a solid outline for the project first. Since I found that it wasn't practical to write a whole book first to come up with the outline, I had to grit my teeth and produce one ahead of time. I soon discovered that a good outline will get you through those days when inspiration flags, and that knowing where you're going does help you to get there. These days, though I still don't enjoy the process, I don't go into any book project without an outline. Fortunately, they don't take that long to create.

What do I mean by an outline? I mean *any* sort of written plan that lists the topics that you plan to cover, with enough detail about each

topic so that, when you write the book, you can use it as a guide. You don't have to use the type of outline with "I. A. 1. a." sorts of headings; your outline doesn't even have to look like a traditional outline. All it needs to be (unless your editor requires a specific format) is a road map with enough information for you to follow it to your destination.

A few tips to keep in mind about your outline:

- **Be flexible:** Make sure your outline format doesn't lock you into a particular arrangement too early. As you create your outline, you doubtless are going to discover that you'll need to move some items around, delete others, and expand still others. Your outlining tool should not constrain you; if you have to spend time thinking about the mechanics of how to nest or to move items around, you're doing it wrong.
- **Don't go too deep:** Although you need a plan if you're not to go haring off in random and unproductive directions, remember that writing even a well-planned book is still a voyage of discovery. Too much detail in an outline can be as troublesome and as counterproductive as too little. Hit the high points, but don't try to include every little thing.

Also, keep in mind that iBooks Author encourages a shallow structure: as I mentioned in [What Is a Textbook?](#), iBooks Author gives you chapters and sections as structural elements; however, it doesn't provide subsections. That means you have only two explicit levels of depth that you can easily realize in a Multi-Touch book's structure. Although you can manually add subheadings within an iBooks Author section, those don't appear by default as part of the book's table of contents like chapters and sections do (though you can make them appear; see [Change the Table of Contents](#)), and you can't move individual pages or groups of pages around like you can do with sections and chapters. My best advice is to match your outline's structure to the structure that iBooks Author imposes.

Tip: The longer your chapters, the more sluggishly your book may perform, especially on older, slower iPad models. In the iBooks Author Help, Apple recommends: "To optimize the viewing experience, create more smaller chapters rather than fewer larger chapters."

- **Remember the instructional context:** If you are writing a textbook, keep in mind how textbooks tend to be used: in a classroom, over a period of weeks, as part of a course of instruction. In that environment, materials are often doled out in small chunks, tied to a lesson plan and to specific assignments—and *not* necessarily doled out in the order of a textbook. What’s more, teachers or administrators may choose which parts of a textbook to use and which to ignore to satisfy curricular needs (this may be one of the reasons for the flat structure that iBooks Author imposes). Therefore, each item in your outline may have to stand on its own. Plan your book so it will be teacher-ready and classroom-friendly.

My Outline Workflow for the Curious

What did I use to outline *this* book? Several tools: I started with Scrivener (<http://literatureandlatte.com/scrivener.php>) because I am familiar with the application (I helped edit Kirk McElhearn’s *Take Control of Scrivener 2*) and because it provides a rich assortment of features for constructing and rearranging outlines.

My Scrivener outline consisted of the book’s planned chapter and section titles, with a short prose synopsis attached to each one. Each synopsis comprised a list of the items I wanted to cover in that part of the book, notes about points I wanted to emphasize, possible ways to arrange the material, and so on.

Then I exported a rough version of the outline into Google Docs so Take Control co-publishers Adam and Tonya Engst could play with it. Next, I exported the revised outline from Google Docs to Microsoft Word format and imported that file into Pages (Google Docs doesn’t export directly to Pages, but Pages can eat Word files with ease).

Once the outline was in Pages, I took it apart. I copied each outlined topic individually from the outline document and pasted it into the canned Pages document that Take Control authors use to begin each ebook. I styled each chapter and section heading with the appropriate Take Control style in my Pages manuscript, and I attached each synopsis from my outline as a comment to its heading in the manuscript so I could refer to it as I worked.

Tip: If you plan to import text from Scrivener into iBooks Author, read the blog post by Keith Blount, Scrivener’s developer, at <http://www.literatureandlatte.com/blog/?p=265>.

Collect Your Assets

By *assets* I don't mean your investments, personal belongings, or vacation home on Maui (though if you have one, I am available to house-sit—*call me*). I'm talking about the non-textual items that you want to include in your Multi-Touch book: images, videos, audio recordings, and the like. You may use some of these assets as direct accompaniments to your text (such as figures, photos, charts, and maps); others you may use as components of interactive elements that you devise to accompany the text (see [Plan for Interactivity](#), ahead in this chapter). At the very least, you'll likely need cover art and an introductory media element for beginning each chapter and section.

While you may produce some of these items yourself, in my experience multimedia projects eat media like a couch potato eats Cheetos, and it is an unusual multimedia project that contains only original and non-rights-encumbered media assets. That means you are going to have to beg, borrow, and, if necessary, buy the ones you need.

Your media assets are (or should be) as integral to your book as the text, and their inclusion requires just as much planning—in fact, it often requires more. I can give you some general, hard-won advice:

- **Don't wait:** Because media assets can take time to prepare or procure, the time to start compiling a list of the ones you need is at the beginning. When you add a topic to your outline, consider how you will illustrate it and include that description in your outline. Which brings me to the next point...
- **Track everything:** Create a separate document, perhaps in Numbers or Excel, to track your assets. For each media asset you hope to include in your book, you should track the following:
 - **Description:** If it's a photo, describe what it depicts. If it's an audio or video recording, include the title, format, and length. Include whatever information you need to keep yourself from asking weeks later, "What the heck is this thing again?"
 - **Purpose:** Where and how you think you'll use it in your work. Note whether it is an illustration or part of an interactive presentation. This information should also be in your outline.

- **Source:** Where you can obtain it. This might be yourself, an artist friend, a stock house for images, an archive or museum, or some other source. Include the information you need to contact the source.
- **Price:** How much it will cost to obtain. If your project has a budget, and most do, this is essential information.
- **Rights:** List the kind of rights attached to the item. Some assets may be completely free to use (such as public domain images), but many others will have limitations, including restrictions on the number of copies you can make, specifications for how you can use them, and so on. See [Be on the Right Side of Rights](#), later in this chapter.
- **Status:** Record if you have the asset, if you are waiting for it, if you are still negotiating to obtain it, and so on.
- **Ask for help:** Although some publishing houses put the onus of securing assets and their rights directly on the author, others maintain staff who specialize in these issues. Colleges and universities often have a department or organization that helps faculty authors keep from running afoul of rights and permissions issues. Librarians are sometimes an excellent source to help you track down media assets. Whatever your situation, don't go it alone if you don't have to.
- **Plan for failure:** The philosophers Jagger and Richards have taught us that you can't always get what you want, but if you try sometimes, you might find you get what you need. Unless your needs are small or you are lucky (or both), the chances are good that you won't be able to obtain every media asset you want. Give yourself fallback positions: if you can't obtain the iconic photo you want, maybe you can find another that does almost as well; if you can't get the video you want, maybe you can obtain still images or another video that provides similar illustrative power. Be flexible; give yourself wiggle-room.

Don't box yourself in: *If your book absolutely relies upon the inclusion of a specific media asset for which you don't have the rights, you are asking for failure. Always have an alternative. Remember that your readers will never know what you intended to include in your book; they'll only see what you did include.*

Be on the Right Side of Rights

Copyright law can be complicated, but you don't have to have all of *Nimmer on Copyright* (<http://www.worldcat.org/oclc/4514674>) under your belt to understand and follow one basic premise: if you don't have the rights to use a copyrighted work in your book, *don't use it*.

And what is a copyrighted work? Just about anything that you can put in a Multi-Touch book: text, image, audio, video. From the moment a work of any sort is created, it is copyrighted, whether a copyright has been formally filed for it or not. This text, as I type it, is protected by copyright.

And what does copyright protect? It protects the copyright owner's right to control who copies the work or *any portion of it*. The copyright holder can assign *rights* to copy the material to others, and the holder can even assign the copyright itself to someone else.

But, not all works are copyrighted: a copyright expires after a time. Currently, in the United States, a written work's copyright expires 70 years after the author dies; the copyright term varies for older works, other types of work, and works of corporate authorship. Generally, to be safe, it's a good bet that if a work was written, photographed, drawn, or recorded within the past 100 years, it is protected by copyright.

Granted, there is such a thing as the *public domain* (http://en.wikipedia.org/wiki/Public_domain), and works in it are free to be copied, and there are also licenses, such as *Creative Commons* (<http://creativecommons.org/>) licenses, that allow for copying (with restrictions) of some works. Still, unless you *know* for a certainty that a work is in the public domain, or that you have the right to use it under a Creative Commons license, *don't use it* without permission.

Luckily, you can often obtain the right to copy a work or portion of it, either by paying for a license, or by asking for, and receiving, permission. Sometimes, all it takes is a letter to the copyright holder to obtain permission, especially when the use is for instructional or nonprofit use. In certain cases, even if you don't have permission, the doctrine of *Fair Use* (<http://www.copyright.gov/fls/fl102.html>) may protect you—but don't count on it. When in doubt, ask. Get the rights. You'll sleep better at night.

Plan for Interactivity

As I said in [Collect Your Assets](#), some of the media assets that you acquire will end up as components of the interactive elements that accompany your text. iBooks Author calls these interactive elements *widgets*, and it provides a nine-pack of them in its Widgets menu on the Toolbar (**Figure 3**).



Figure 3: The nine interactive widgets found on the Widgets menu.

Six of these widgets you can think of as ways to interactively illustrate your main text; two of them provide ways to expand upon the main text; and one of them, Review, is a study aid.

These interactive widgets are available to enrich and supplement your text. Used effectively, they can add life and energy to your book. However, a widget can take significant time and effort to produce and polish, and too many of them can distract your readers from the main content of your book. Like any spice, they usually produce the best effects when used sparingly.

Here are capsule descriptions of each widget along with example images taken from this book's Multi-Touch companion book, *Take Control of Getting Ready for iBooks Author*, where the examples are fully functional (see the sidebar [Try These Widgets in a Multi-Touch Book](#)):

- **Gallery:** If you have a set of pictures that you'd like readers to compare (say, a biology book with photos of a bacteria or mold culture growing over time), use this. Readers can flip through the images, and you can provide a caption for each image (**Figure 4**).



Figure 4: An example of a Gallery widget.

- **Media:** For video or audio illustrations, this is the widget you use (**Figure 5**). In a Multi-Touch book, your reader gets the standard iPad player controls for video or audio playback. You can specify start and stop times and some other display options for media presented by this widget.

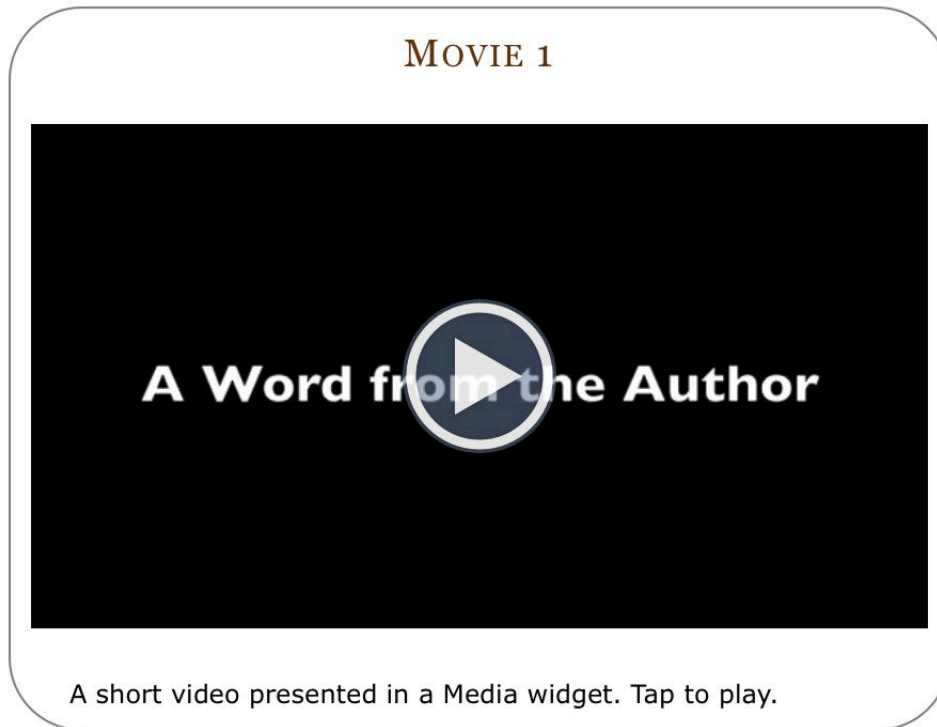


Figure 5: A Media widget example.

I explain more about using and optimizing playable media in [Add Video and Audio](#).

- **Review:** To present your reader with a short set of interactive study questions, the Review widget provides several multiple choice and dragging questions (see **Figure 6** for an example).

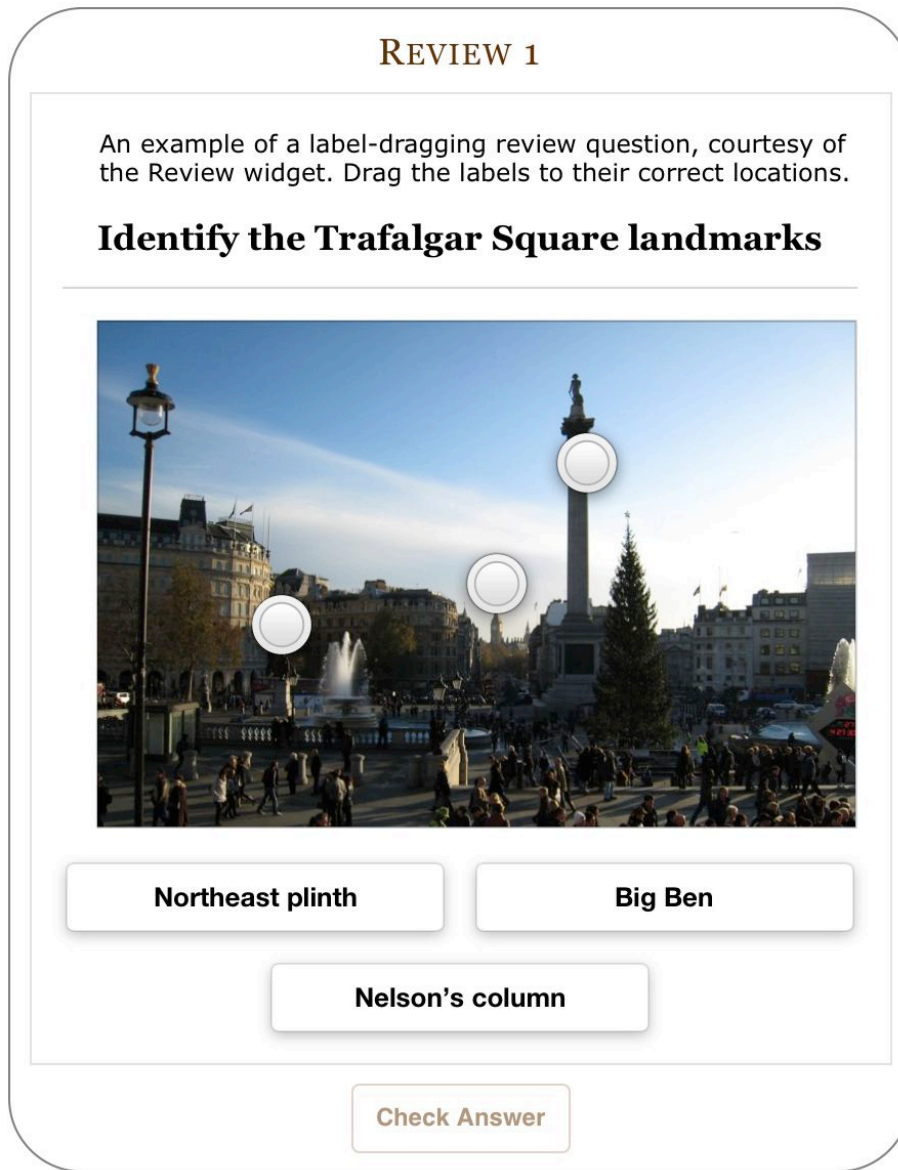


Figure 6: A Review widget example.

You can mix the types of question used in a review widget. As the name suggests, the review widget is not a testing mechanism (it doesn't store the results for a teacher to check and record later), it merely helps the reader review the material being presented. The questions presented by a review widget are a good way to reinforce the main concepts in a section or chapter.

I describe how to use this widget in [Add Study Questions \(and Answers\)](#).

- **Keynote:** To illustrate your text with Keynote presentations, you use the Keynote widget. You can also use this widget for PowerPoint presentations—if you convert them to Keynote format first. Much has been written about the limitations and dangers of such presentations (a Web search for [PowerPoint considered harmful](#) is enlightening), but the bullet-point-with-illustrations slideshow format nonetheless can be a useful review and summary tool. The widget can display only Keynote presentations that have been converted to HTML, although iBooks Author will do the conversion automatically if Keynote is installed on your Mac.

Presentations can display in the page or in full-screen, and they can have optional navigation controls (**Figure 7**).

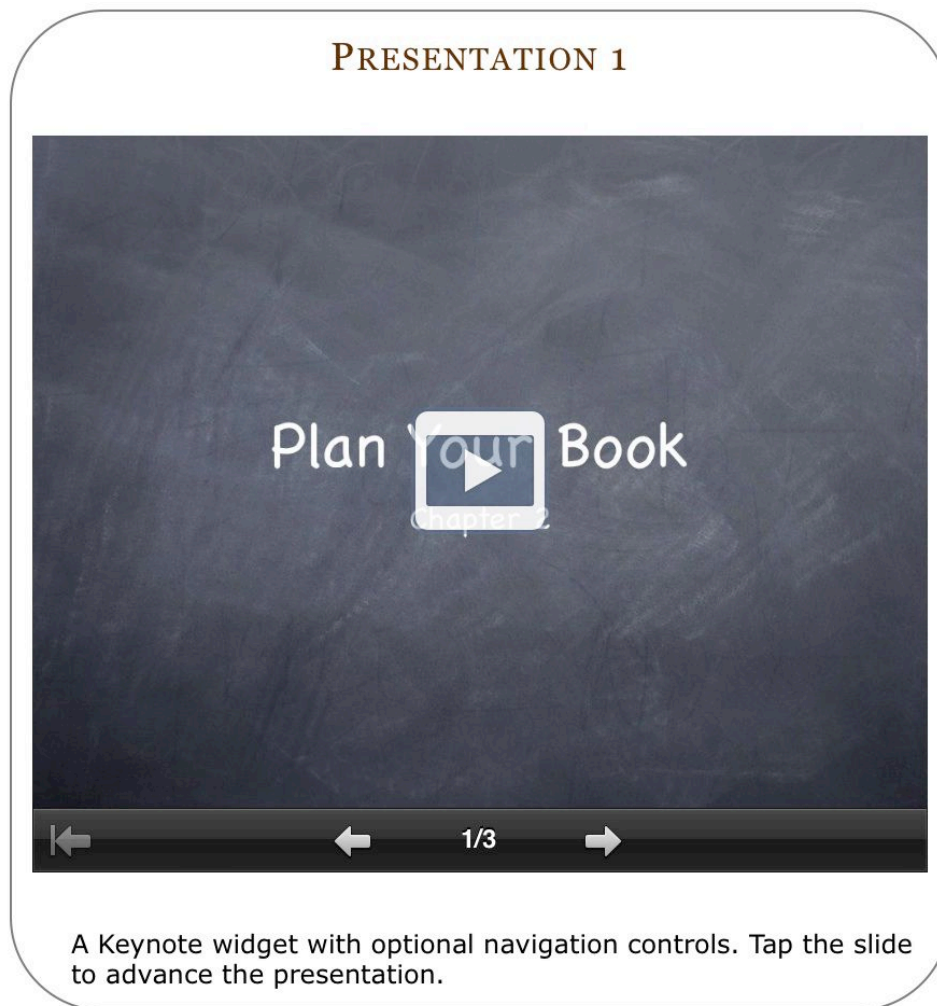


Figure 7: A Keynote widget example.

I discuss how to use this widget in [Add Keynote Presentations](#).

- **Interactive Image:** To allow students to zoom around an image and view points of interest you have labeled, choose the Interactive Image widget. You might use this for interactive maps, visual tours of a historic site, identifying the parts of a flower, and so on. The widget also provides optional navigation controls (**Figure 8**) and the capability to provide extended descriptions in an optional sidebar overlay.

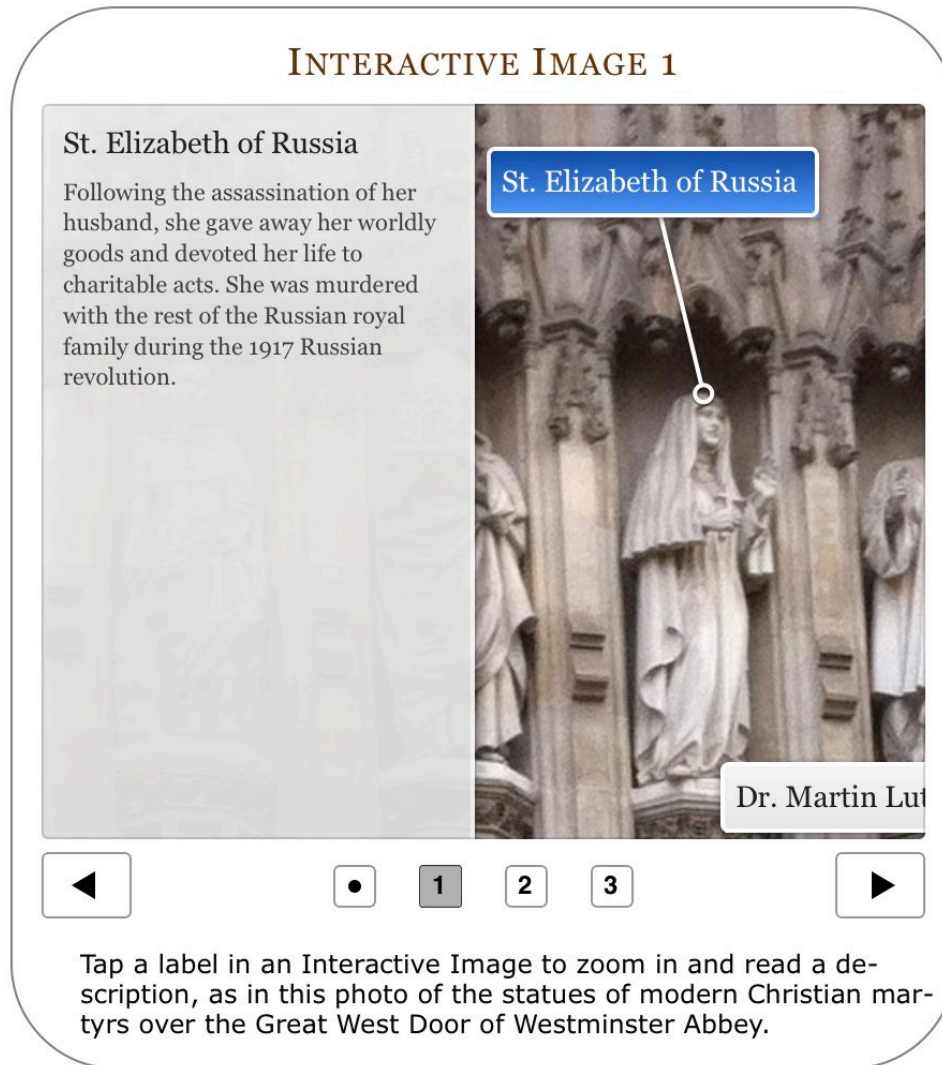


Figure 8: An example of an Interactive Image widget.

Skip ahead to [Add Interactivity](#) for details about how to set this widget up and use it.

- **3D:** If you need a scalable, rotatable model of something, such as a molecule or a machine part, you can use the 3D widget, which displays COLLADA format 3D models (<http://en.wikipedia.org/wiki/COLLADA>) as shown in **Figure 9**.

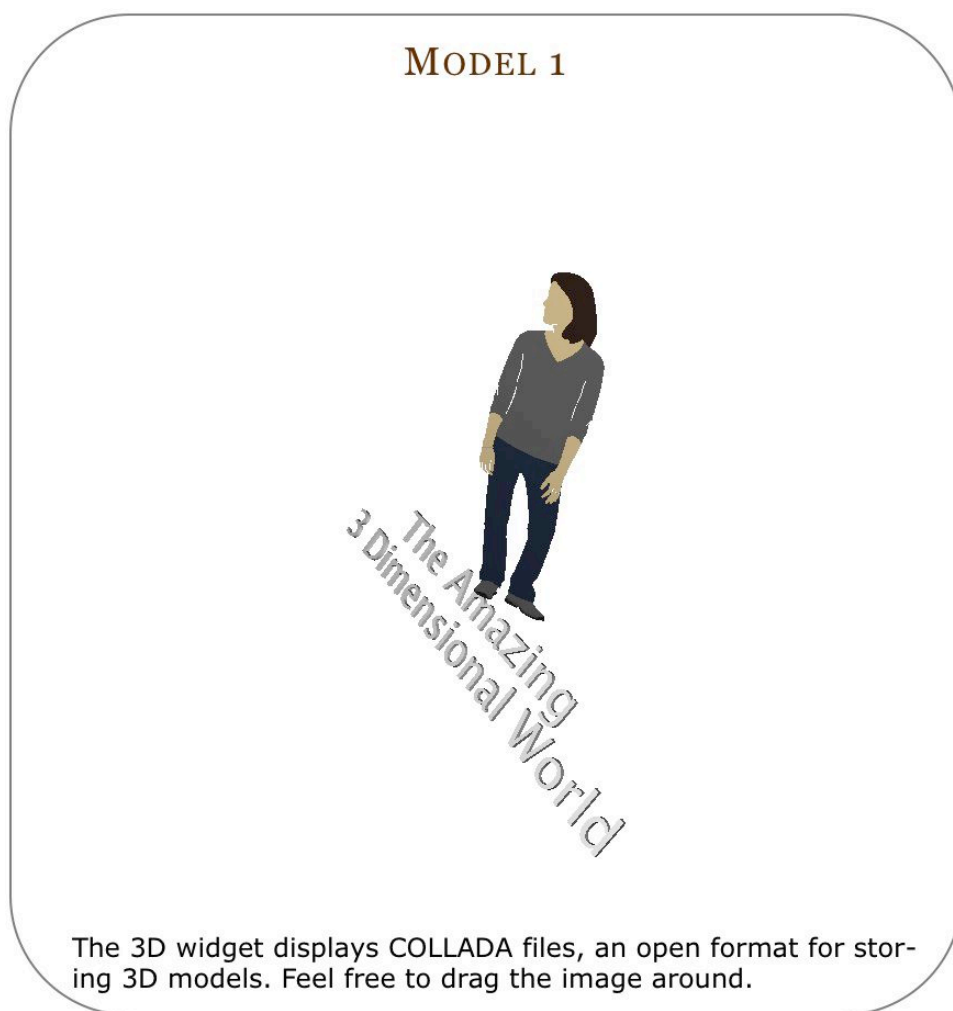


Figure 9: A 3D widget example.

Many 3D rendering programs can produce COLLADA files (they have a [.dae](#) file extension, should you happen to run across one).

Read [Add 3D Objects](#) to see how to put a 3D model in your book.

- **Scrolling Sidebars and Pop-Overs:** Print textbooks often have sidebars. A sidebar usually appears as a box set off from the main text, often in a different typeface and with a different background color to distinguish it. In print books, sidebars tend to be short, rarely taking up a full page, and the book’s main text flows around them. This layout technique lets the reader know that the content in the sidebar is a digression from the main content.

iBooks Author has a Scrolling Sidebar widget (**Figure 10**) that can present such ancillary but interesting information to accompany your book’s main text. Like a print-book sidebar, a Scrolling Sidebar can include images and shapes and even embedded text boxes. Unlike a print sidebar, however, the dimensions of a Scrolling Sidebar don’t limit what it can contain, because readers can scroll through it.

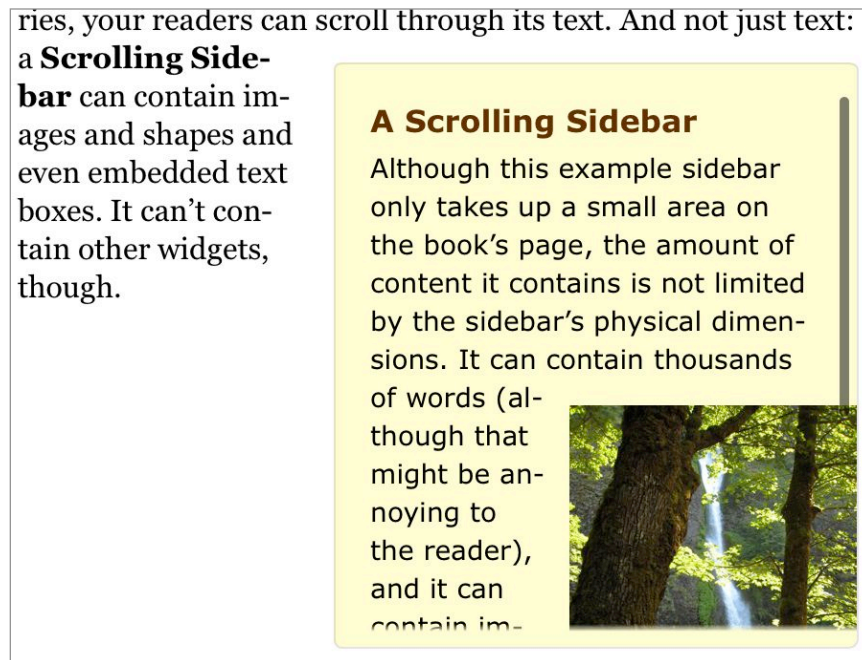


Figure 10: Example of a Scrolling Sidebar widget with scrollbar showing.

Another way to satisfy your readers’ hunger for additional information is with a Pop-Over—no, not the baked good (that’s a *popover* without the hyphen) but a widget that pops text and images over the page.

Pop-Overs are anchored to an image on the page, such as the picture of a baked popover shown in **Figure 11**. When the reader taps the image, the Pop-Over pops up. Like a Scrolling Sidebar,

a Pop-Over widget can contain a good deal of text—as well as images, shapes, and embedded text boxes. A Pop-Over can scroll like a Scrolling Sidebar can, too, so you can load a Pop-Over with as much content as you need. Remember, though, that unless you let your readers know that the image anchoring a Pop-Over is active, they may assume that it is just another graphic sitting on the page.

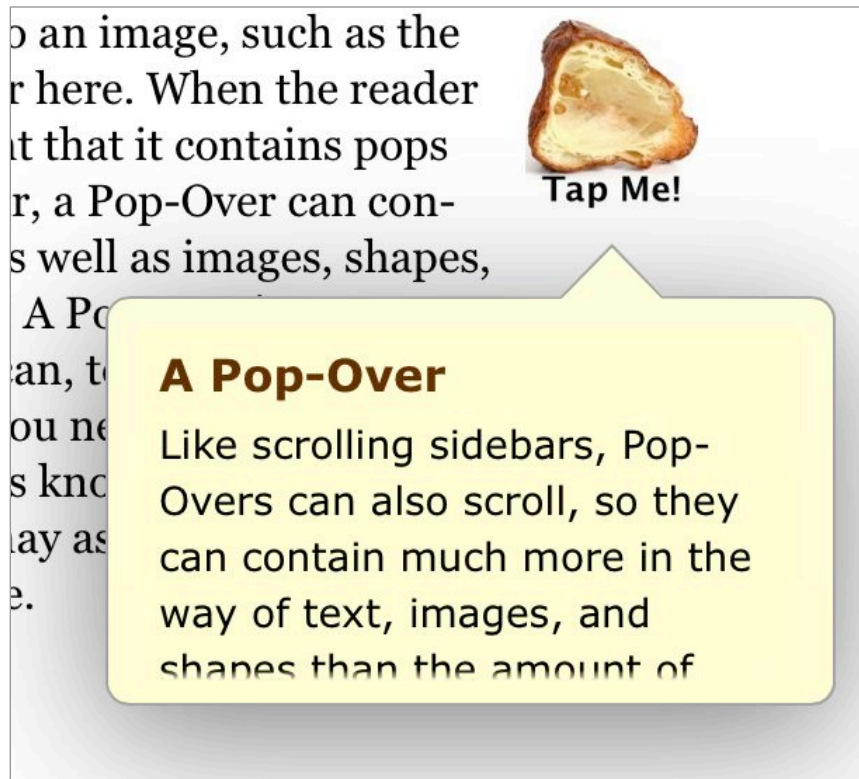


Figure 11: An example of a Pop-Over widget with an image of a popover as its anchor.

Find out how to add these two text-expanding widgets in [Add Scrolling Sidebars and Pop-Overs](#).

- **HTML:** In case none of the other widgets provide quite the illustrative or review capabilities you need, and you have basic programming chops, you can use an HTML widget (**Figure 12**). This widget doesn't accept any old HTML, though: it must be HTML that is packaged in a Dashboard-compatible widget. Dashcode, a part of Apple's free Xcode developer tool suite (<http://itunes.apple.com/us/app/xcode/id497799835>), can produce such files, and a number of other applications can as well.

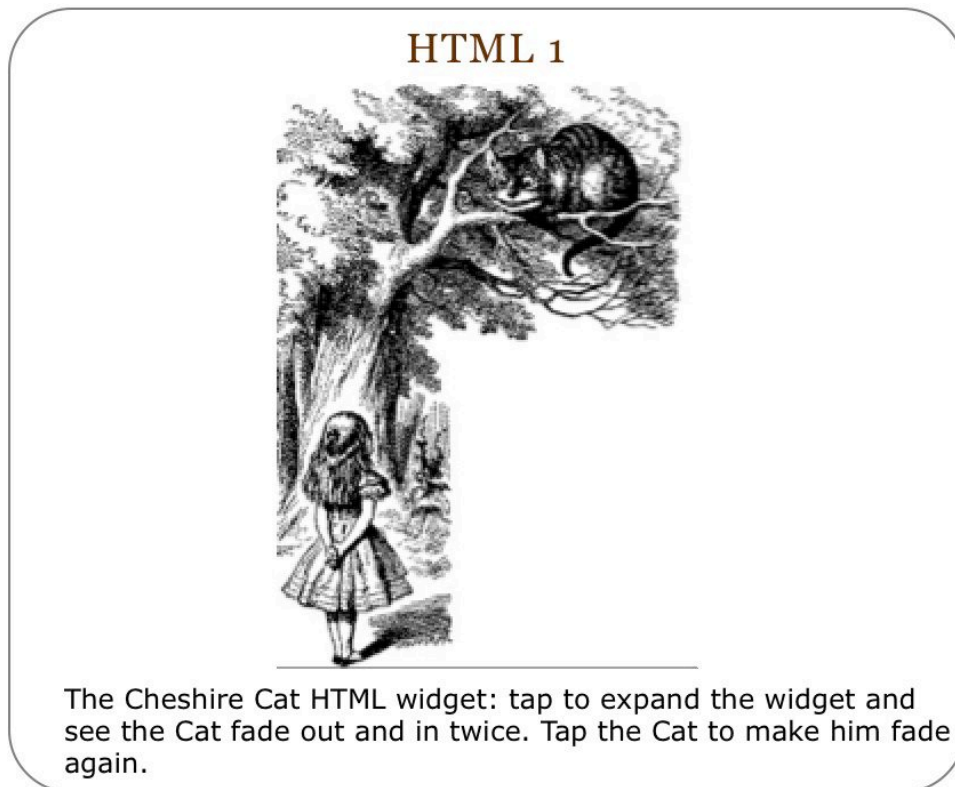


Figure 12: An example of a dynamic HTML widget.

As the wide range of available Dashboard widgets demonstrates (see, for example, Apple's collection of widgets at <http://www.apple.com/downloads/dashboard/>), you can do simulations, calculations, animations, and much more in a Dashboard widget. These widgets, however, do not provide their interactive capabilities directly on the page of a Multi-Touch book: the reader must tap the widget, at which point iBooks presents the widget in full-screen so that the reader can interact with it.

I discuss the care and feeding of HTML widgets in [Add HTML](#).

Try These Widgets in a Multi-Touch Book

This book has a free companion book, *Take Control of Getting Ready for iBooks Author*. It contains versions of a few chapters from this ebook, including the chapter you are now reading. However, *Take Control of Getting Ready for iBooks Author* was created in iBooks Author and exported in iBooks format, meaning, of course, that it can be read only on an iPad in Apple's iBooks app. The version of this chapter in *Take Control of Getting Ready for iBooks Author* includes the functional widget examples from which the figures in this chapter were captured: you can play the video, interact with the interactive image, spin the 3D image, and so on.

If you are reading *this* ebook on your iPad, you can tap the following link to download the 9.7 MB *Take Control of Getting Ready for iBooks Author* Multi-Touch book:

<http://www.takecontrolbooks.com/resources/0132/TCoGettingReadyforiBooksAuthor-1.1.ibooks>

Safari on your iPad may show a blank screen during the download, so keep in mind that the 9.7 MB file may take a few minutes to transfer over a typical Internet connection (or longer on a slow connection). Once the file is downloaded, tap "Open in iBooks" (or "Open in") to transfer the file to the iBooks app. Switch to the "Plan Your Book" chapter to view the "Plan for Interactivity" topic.

If you are reading this ebook on a Macintosh or Windows computer, you can also use the link above to download *Take Control of Getting Ready for iBooks Author*. It will download to your usual Web downloads location. To read the ebook, you must transfer it to an iPad: in iTunes, choose File > Add to Library and then, in the Add to Library file window that appears, navigate to the book, select it, and click Open. Next, select your iPad in iTunes, click the Books button on the button bar near the top of the window, and then make sure *Take Control of Getting Ready for iBooks Author* has a checkmark by it so that it will copy to your iPad next time you sync.

We distribute *Take Control of Getting Ready for iBooks Author* on the iBookstore, so you should be able to download it for free from the iBookstore as well.

Write Your Book

And then a miracle happens and one day you wake up and the elves have written it.

No, I won't cover the mysterious, ineffable process of writing nor whether elves have anything to do with it, but I will discuss the *mechanical* basics. After a look at how to install iBooks Author, I help you [Decide Where to Compose](#), with a look at the pros and cons of writing directly within the iBooks Author interface, and, similarly, the pros and cons of writing in your favorite writing environment and then importing your finished (or almost finished) text into iBooks Author. And, if you decide to import your text, I offer important advice on how to handle formatting and styling.

I next turn to a central task in making a Multi-Touch book when I describe how to [Choose a Template](#), with guidance about how to [Choose between Portrait and Landscape Templates](#), and then describe how to [Customize a Template](#), including how to modify the different layouts that comprise a template, and how to [Make Placeholders](#).

Finally, in [Format and Flow](#), I explain how your text flows from one column to the next and from one page to the next, and offer you options for customizing that stream, including how to [Create a Stand-alone Text Object or Shape](#), pointers for how to [Format Text](#), and an explanation for how to [Use Updating Text](#) to insert certain elements, such as automatic page numbers.

You have to provide the text-writing elves yourself.

Get iBooks Author

Before you can perform any magic with iBooks Author you need to have a copy of it on your Mac. You can obtain a free copy of it from the Mac App Store from your Internet-connected Mac:

1. Choose Apple  > App Store.

2. If you've already signed into the App Store on your Mac with an Apple ID, go to the next step; otherwise, do one of the following:
 - If you have an Apple ID, choose Store > Sign In, and then follow the sign-in instructions.
 - Choose Store > Create Account, and then follow the instructions for creating an account.
3. In the Search field at the top-right of the App Store window, type **iBooks Author**.
4. In the list of hits that appears, on the one for iBooks Author, click Free.
5. Click Install App, and provide your password when requested. The App Store downloads iBooks Author and presents its icon in your Mac's Launchpad.
6. Open Launchpad and then click the iBooks Author icon in Launchpad to launch it. (Or, open iBooks Author in whatever way you prefer to open Mac applications—you'll find it in your Applications folder.)

And with that easy but essential step out of the way, let's get started on making a book.

Decide Where to Compose

No, I'm not talking about deciding which room you write in and which chair you sit in while you do it. I'm talking about whether you want to work directly within iBooks Author as you compose the text of your book, or whether you want to do your writing with the word processing software you normally use and then import the text into iBooks Author for layout, editing, and tweaking. There is no right or wrong decision here: each strategy has its advantages and disadvantages.

Composing your Multi-Touch book probably will consume more time than will customizing your book's appearance, but I don't have nearly as much to say about the composing process. Mechanically, you have two choices: write within iBooks Author, treating iBooks Author as a word-processor, or import the bulk of your text into a prepared iBooks

Author template and fine-tune it. I talk about the pros and cons of each option next, and I offer important tips for working effectively.

Compose in the Shell

Here are some of the advantages of composing your book directly within iBooks Author:

- **It's WYSIWYG:** You get a clear idea of what your book will look like as you go, courtesy of the What You See Is What You Get environment. If seeing what your work will look like to your readers is important as you write, writing directly in iBooks Author is the only way you can do it.
- **It's interactive:** As you write in iBooks Author, you can also start embedding your interactive illustrations (see [Add Your Assets](#)). If your text needs to refer in detail to your book's interactive features, it is helpful to see and try them as you write.
- **It's testable:** As you work you can see not only what your book may look like, but you can actually try it on an iPad at any time, using the Preview feature (see [Proof and Fine-Tune](#)).

On the other hand, iBooks Author is not designed for collaboration. It offers no capability for tracking changes or for commenting on the text. Moreover, only one person can work on the book at a time, so if you have co-writers, the logistics of passing the One True Book-in-Progress file around can be troublesome and inefficient.

Also, unless you are familiar with Apple's Pages word processor, you'll have to take some time getting up to speed with iBooks Author. Nearly all the word processing commands and tools in iBooks Author are identical to those in Pages, and they usually work in the same ways (one might suspect that Pages and iBooks Author share many of the same software components). If you know Pages, you have a head start; if you don't, you have a learning curve to climb.

Here's some advice for anyone who is about to start writing directly within iBooks Author for the first time:

- **Make backups regularly and frequently:** Yes, your Mac is very reliable, but when you write in iBooks Author, all your eggs, as it were, are in one basket: your text, interactive illustrations, study questions, and glossary are all stashed within a single file (well, *package* really, but let's not quibble). It would be a shame

if something happened to it—so don't let it. (*Take Control of Backing Up Your Mac* can help you devise good backup practices.)

- **Stay focused:** With all the interesting and attractive capabilities that iBooks Author offers, and the proclivity of many writers to look for procrastinatory excuses, you might find yourself spending inordinate amounts of time trying iBooks Author features instead of writing. Don't get distracted: when you are supposed to be writing, write.
- **Give yourself time to play:** In direct contradiction to what I just said, you do need to spend nontrivial amounts of time trying features in iBooks Author so you can see how they work—and don't work. Particularly at the beginning of your first project, you should budget ample time for what I call *productive fooling around* (I don't always say *fooling*). Make two or three sample books that you don't care about to use for experiments in functionality and design, and then mess them up in as many interesting ways as you can.

To summarize: if you are writing your book by yourself, are familiar with Apple's Pages word processor, and feel a strong need to see your book come to life as you write, composing your book directly within iBooks Author is a reasonable way to go.

Import Text

Just as you don't need a printing press and bindery to write a book, you don't need to write within iBooks Author to write a Multi-Touch textbook (although, of course, you *will* need it to assemble and publish the final work).

Here are some good reasons to do the bulk of your writing outside of iBooks Author:

- **Less distracting:** iBooks Author has much attractive, distracting eye-candy to keep you from your task—tools, sidebars, Inspectors, all screaming *click me, please!* On the other hand, the current generation of writing tools, such as Pages or Scrivener (<http://www.literatureandlatte.com/>), have special full-screen modes that eliminate most distractions. If you need a distraction-free writing environment, using one of those writing tools is the way to go.
- **Collaborative possibilities:** As I remarked a page or so earlier, iBooks Author does not lend itself to collaborative workflows. If

you need to work with one or more co-writers, you may prefer working with Google Drive or another system that enables multiple people to work on the same document at the same time.

- **Access to tools and resources:** While iBooks Author is exquisitely tuned to produce Multi-Touch textbooks, it has few facilities for managing the research and ancillary materials that writing a textbook usually entails. If your access to materials goes beyond mining what's available in iBooks Author's Media browser, a writing tool like Scrivener, which provides the capability to store, organize, and access a wide range of research and other materials in addition to its capabilities as a word processor, may be where you want to do the bulk of your writing.

If you write in an environment other than iBooks Author, you can bring your text into your Multi-Touch books in two ways:

- **Import:** You can import documents stored in Pages format (.pages files) or Word format (.doc or .docx files). To import a document, you can either choose Insert > Chapter from Pages or Word Document or drag the document into the iBooks Author sidebar from the Finder.
- **Copy and paste:** You can copy text from any source to your Mac's clipboard and then paste it directly into the iBooks Author document. Pasted text appears in the default font family that is assigned to the text object into which you paste it rather than in the same fonts as the source.

Before you start copying and pasting or importing, however, you should consider what will become of your styles. And, if you import, you should give some thought to whether your chapters should be in one huge document or in a series of smaller files. (See [How Much to Import at Once](#), a few pages ahead.)

Let iBooks Author handle your fonts! When you import or copy and paste, some formatting may be lost. In addition, any font families you use that aren't available on the iPad are substituted. Therefore, don't spend much time on styling your text as you write it; instead, format the text after you bring it into iBooks Author.

When You Import Styles

When you import text from a Pages or Word document, whatever styles you used in that document can be imported as well. However, passages of text that have styles with names matching those in the iBooks Author template you are using don't take on the iBooks Author styles' look. Instead, the text appears as it did in your original document, and the styles have red arrows by their names in the iBooks Author Styles drawer (similar to the Styles drawer in Pages). The red arrows indicate that the text's appearance overrides the template's style.

Note: If the Styles drawer is not visible, choose View > Show Styles Drawer (Command-Shift-T).

You can use the Styles drawer to revert to the iBooks Author style or to redefine it to match the look in your source document (**Figure 13**).

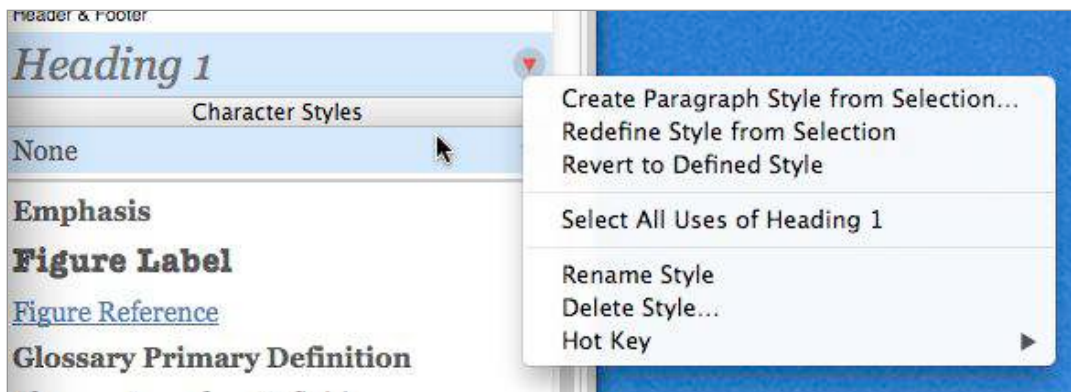


Figure 13: Options for a style that has been overridden upon import (note the red triangle).

Tip: To change all occurrences of an overridden style to the iBooks Author template's defaults within a chapter or section, place your cursor in a passage that has the overridden style, choose the Select All Uses item in the Styles drawer's pop-up menu, and then choose Revert to Defined Style. However, when you revert to a defined style, you lose any typeface variants within the text, such as italic or bold.

You may also find that a style you created in your source document, like, say, Quotation, should use a style supplied by the template instead, like Quote. Here's how to do that conversion after you import your text:

1. Click anywhere in a run of the style that you want to change, such as Quotation.
2. In the Style drawer, click the down triangle ▼ to the right of the selected style's name, and then, in the menu that appears, choose *Select All Uses of style name*.
3. In the Style drawer, click the style you want to use instead, such as Quote. The appearance of the selected text takes on the newly selected style's appearance, with typeface variants preserved.

Note that you have the option of discarding styles when you import; typeface variants like bold and italic are still imported, but the named styles are dropped—everything comes into iBooks Author using the default body style for the template.

Tip: Import the same document into two or more different layouts if you want to see how those layouts look with real text.

How Much to Import at Once

You can import no matter if your book is all in a single file or if each chapter is in its own file; however, *how* you proceed depends on how you have stored your Word or Pages source documents.

iBooks Author imports Pages or Word documents into one or more new chapters or sections, using the layout of your choice (**Figure 14**). The import process uses section breaks in the original document to break it up into chapters or sections in iBooks Author's sidebar. (Don't worry if you don't know what a *layout* is at this point; [Modify the Layouts](#), later, describes what they are and how you use them. For now, think of them as sets of page designs provided by iBooks Author.)

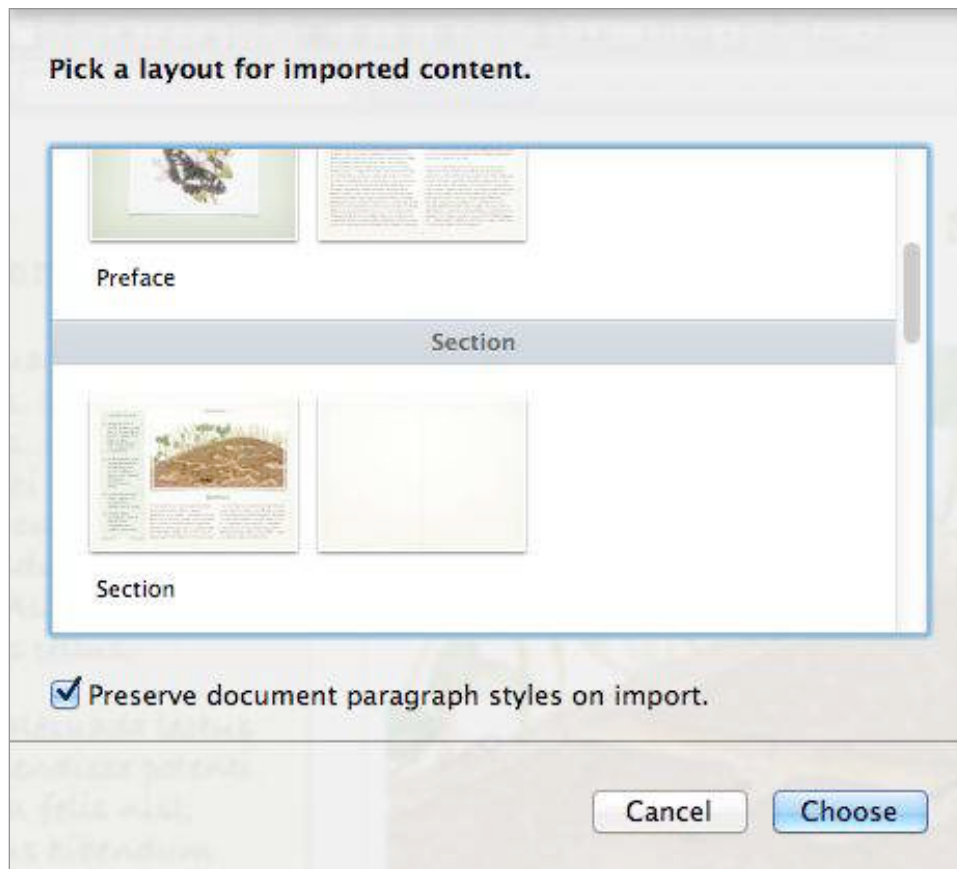


Figure 14: Choose a layout and optionally discard styles.

Here are two ways to handle importing your book:

- **Source document contains your entire book:** Pick a chapter layout in the Pick a Layout for Imported Content dialog, and iBooks Author imports your book, creating a new chapter whenever it encounters a section break in your source document.
- **Each chapter is in a separate file:** Pick a section layout from the dialog and during the import iBooks Author creates a new section whenever it encounters a section break in the source.

See [Importing Tips](#) for more detailed import strategies.

How I Created This Ebook

For both the Multi-Touch companion to this book and this book itself, I wrote my text outside iBooks Author. You can read the sidebar [My Outline Workflow for the Curious](#), earlier, to find out how I began the project with an outline in Scrivener. Once the outline was approved, I composed the text in Pages. As I neared the end of the first draft, several editors read the file in Pages, and we collaboratively used Pages' Change Tracking and Commenting features to discuss the text.

With the Pages manuscript completed, the Take Control production team created this ebook from Pages, using Pages' PDF and EPUB export features in our custom—and ever-evolving—production process. A MOBI version was also produced for Kindle users. The finished book was then made available for sale on the Take Control Web site, the Amazon Kindle store, the O'Reilly Media Web site, and Apple's iBookstore.

And what about Multi-Touch version? Although we didn't produce *this* book in iBooks Author, we did produce a related book: *Take Control of Getting Ready for iBooks Author*. To do that, I copied the first few chapters of it into iBooks Author so I could reformat them for a Multi-Touch book. We then prepared it as described in [Prepare an iTunes Store Package](#) and used an iTunes Connect account to upload the file to the iBookstore. We also made the ebook available as a free download from the Web. (Flip back to [Try These Widgets in a Multi-Touch Book](#) to learn how to download that ebook.)

Choose a Template

Every Multi-Touch book that iBooks Author produces starts from a template. Notably, unless you have changed iBooks Author's defaults, it doesn't make a difference whether you choose File > New (Command-N) or File > New from Template Chooser (Command-Shift-N): the result is the same—iBooks Author presents you with the Template Chooser (**Figure 15**).

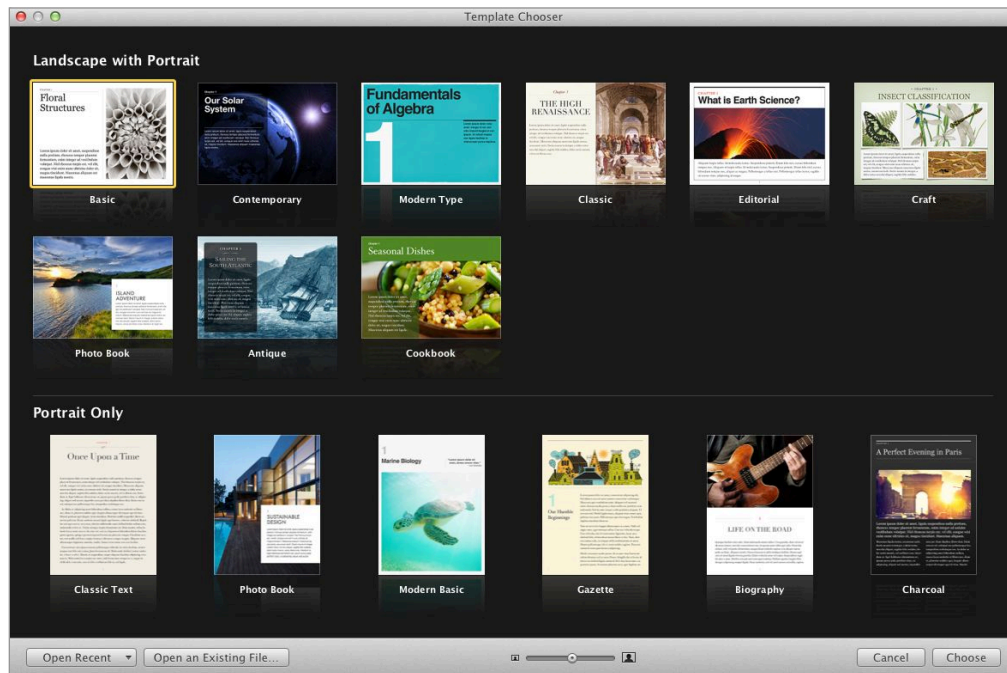


Figure 15: Every book begins with a template, and iBooks Author has 15 to choose from—though you can add others.

Choose between Portrait and Landscape Templates

The first choice you make is your book's default orientation. You may have noticed in **Figure 15** that the templates in iBooks Author 2 come in two varieties: Landscape with Portrait and Portrait Only. **Figure 16** gives you a slightly closer look at what iBooks Author offers.

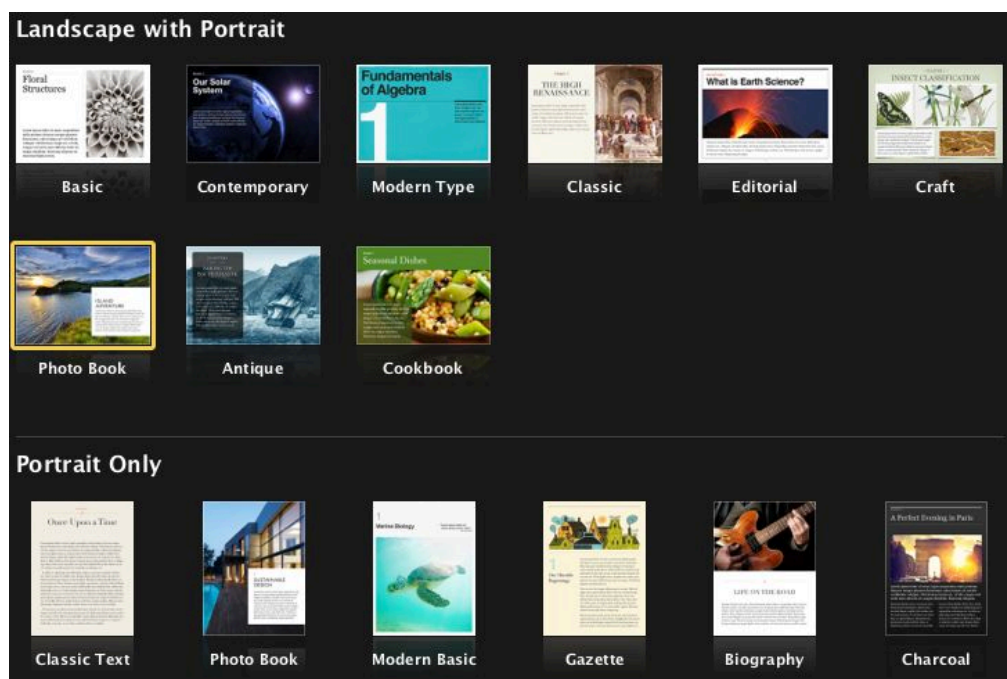


Figure 16: Templates, wide and tall.

A look at those choices makes clear that the Landscape with Portrait templates are iBooks Author’s favorites: this category provides three times as many templates as does the Portrait Only category. That’s not surprising when you consider that Landscape with Portrait was the only kind of template offered in iBooks Author 1.

Landscape with Portrait templates provide pages wider than they are tall, and usually present the text and graphics in a two-column spread; the Portrait Only templates provide pages that are taller than they are wide.

Figure 17 shows sample section opening pages from each kind of template.

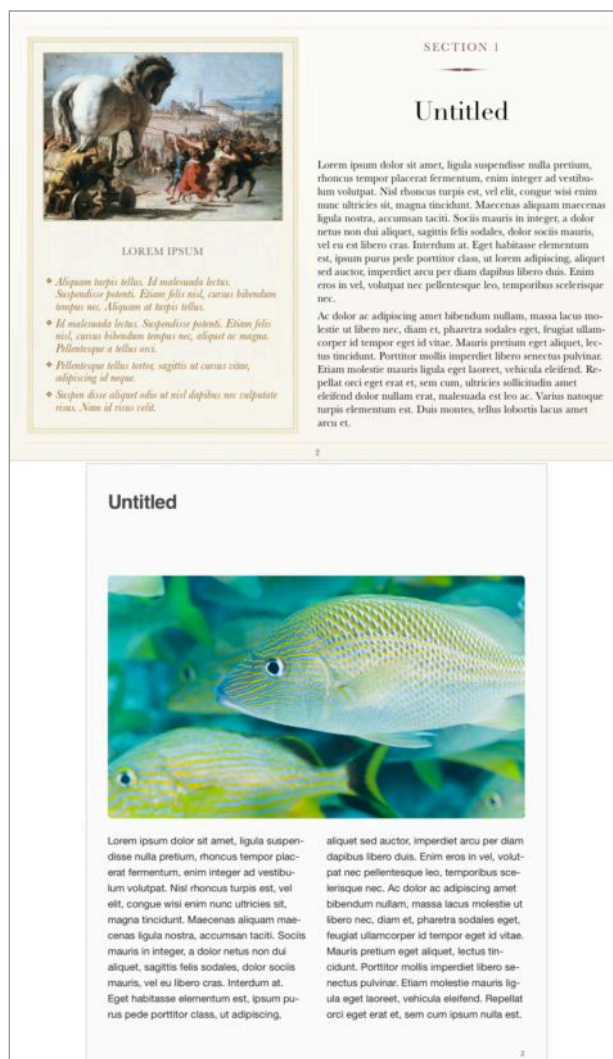


Figure 17: Landscape page (top) from the Classic template and Portrait page (bottom) from the Modern Basic template.

In the remainder of this section, I describe how to use a Landscape with Portrait template because that kind of template provides the most customization options. Don't worry: just about everything I describe also applies to Portrait Only templates, and, when it doesn't, I point that out.

The template I use most often to illustrate how to adapt and revise a template is the Craft template. I've chosen it because that template provides a robust set of text and image placeholders, and, as you find out very shortly, playing with placeholders is a big part of customizing an iBooks Author book.

You can't tell a template by its cover: *The book covers shown in the Template Chooser can be misleading since they might lead you to think that you must choose the template depending on the subject matter you intend to cover. That's not necessarily so; the title that appears on a book cover in the Template Chooser is merely a sample to give you a quick impression of that template's visual design and may have little to do with the kinds of content that it can handle.*

Meet the Book Elements

What every template provides are a set of *book elements*, and every template, no matter how it looks, provides the same ones. Where templates differ are in their visual designs and in the *layouts* provided for some of their elements: layouts are designs that you can modify and apply to certain book elements (see [Modify the Layouts](#) for more—much more—about layouts).

When you create a new book by choosing a template, iBooks Author presents its main window, with a set of toolbars at the top, a content work area to the right, and a Book sidebar to the left. The individual book elements appear in that sidebar (**Figure 18**).

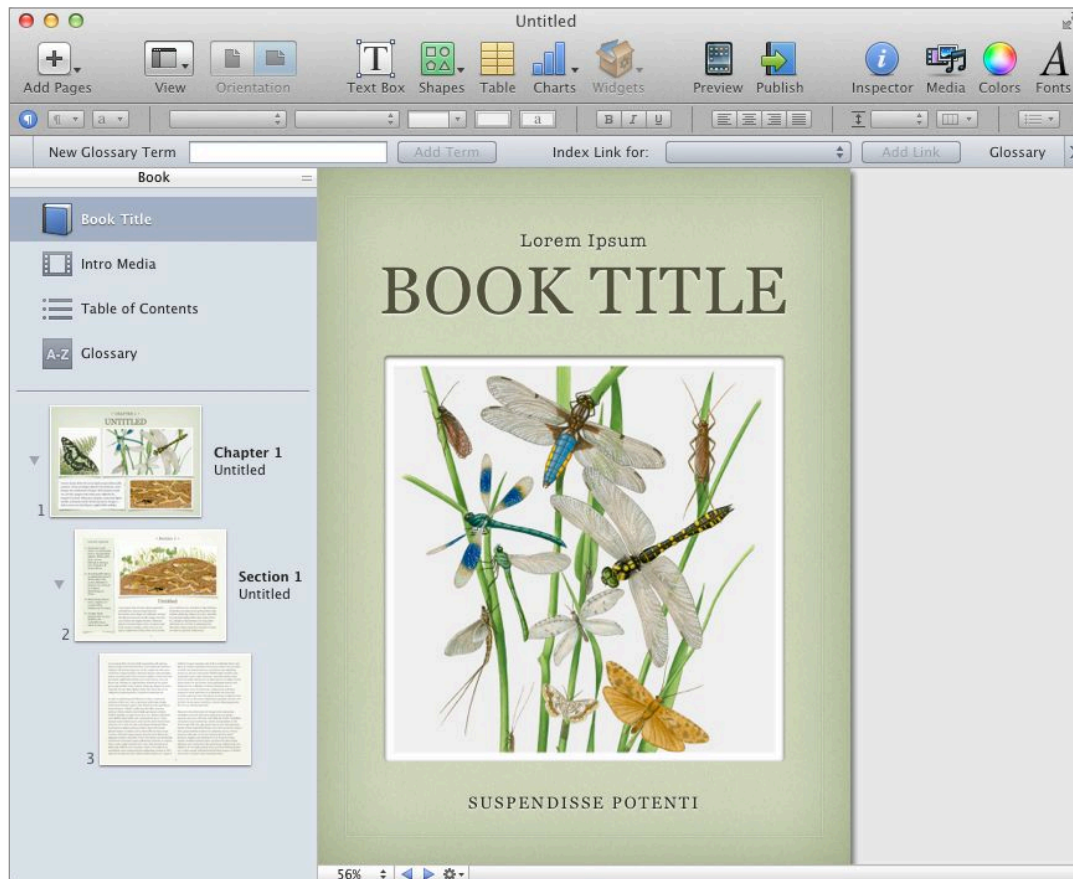


Figure 18: A new book, with its elements in the Book sidebar at left. This book uses the Craft template.

Here are the book elements that appear in a newly created Multi-Touch book:

- **Book Cover:** This is the cover of your book, as it appears on the iPad. The label it has in the Book sidebar in iBooks Author is the title you give the book; “Book Title” is the default name of every new book. See [Change the Book Cover](#).
- **Intro Media:** An optional element, it is the first thing the reader sees, or hears, when the book opens. It can display a picture, or play a video. See [Change the Intro Media](#).
- **Table of Contents:** This automatically generated element enables readers to navigate the book. See [Change the Table of Contents](#).
- **Glossary:** You can add terms and definitions to this optional element. If you don’t add any, though, the Glossary won’t appear in the published book. See [Create and Organize a Glossary](#).

- **Chapters:** By default, a book starts out with one chapter, which contains one section, which, in turn, contains one page. You can, however, create a book which consists only of sections and pages, or one that consists only of chapters and pages, but no sections. You can't create a book that contains only pages. The titles of the chapters (if any) and sections (if any) appear in the Table of Contents. Ordinarily, your book will contain chapters that are subdivided into two or more sections. See [Modify the Layouts](#), [Compose in the Shell](#), and [Import Text](#).
- **Sections:** These are usually contained within chapters, although you can add them outside of chapters as well. Most templates have certain specialized section layouts, such as a copyright page layout or preface layout, that you might want to place outside of a chapter. See [Modify the Layouts](#), [Compose in the Shell](#), and [Import Text](#).
- **Pages:** These contain the bulk of the text of your book. As you add text to your book, pages are automatically generated. You can adjust the layout of individual pages or groups of pages. See [Modify the Layouts](#), [Compose in the Shell](#), and [Import Text](#).

Tip: You can preview your book at any stage of development on an iPad that's connected to your Mac. I describe how to do this in (where else?) [Preview Your Book](#).

About Book Elements and Organization

The arrangement of the book elements in the sidebar controls the organization of your book. The first three book elements described in [Meet the Book Elements](#) always appear in the same order, and there's never more than one of each: the cover always appears first, the intro media (if any) always comes next, and that's always followed by the Table of Contents. (Ignore the Glossary for now; it's special.)

It's when you go below the line in the sidebar that the organizational fun begins. The area below that line is where your book's individual chapters, sections, and pages appear, and it's where you go when you want to tinker with how your book is arranged. Although you start with only one chapter, section, and page when you create a new book, that quickly changes: these three types of book elements are the ones that contain your book's content, and you can have as many of each of them as you require, creating and deleting them at need (to add any of these elements, select the element in the sidebar under which you want the new element to appear, and then choose an element type from the Insert > Pages command; delete elements by selecting them in the sidebar and pressing Delete).

Most importantly, in terms of your book's structure, the chapter and section elements can be moved around: you can drag a section from one chapter to another, or from one place in a chapter to another, or even move it outside of a chapter to stand on its own, and the pages it contains go with it. Similarly, you can move a chapter from one place to another in the sidebar, and all the sections and pages it contains move with it.

What you can't reorganize is the order of pages *within* a section or chapter. That's because pages are designed to hold text that flows from one page to the next, and this text flow is what dictates the order of pages in a chapter or section (see [Format and Flow](#)).

If you have done as I suggested in [Assemble the Outline](#), the chapters and sections in your book should correspond to the items in your book's outline. If the outline needs reorganization at any time while you are creating the book (and, chances are, it will), you can drag the chapters and sections in the sidebar to reflect the new arrangement.

Customize a Template

On the following pages, I walk you through the details of customizing a book's template to suit your needs: the good news is that iBooks Author gives you much that you can customize. The bad news is that this flexibility means that there are a lot of details to absorb, and it can be overwhelming at first. However, you don't have to do all your customizing before you start writing your book. You can customize your book's appearance at any time. Write and customize at the pace and in the order that works best for you.

You might also do what I did when I first encountered iBooks Author: spend a day or two making a "throw-away" book so you can play around with iBooks Author. And, in case anyone asks, playing that way is working. So don't feel guilty if you end up having fun in the process.

Customize the Opening

You can customize the first three items that appear in the Book sidebar: the book cover, the intro media, and the table of contents. I cover each of them separately.

Change the Book Cover

When you click the top item in the Book sidebar, the book's cover appears in the main working area of the iBooks Author window. No matter which template you choose, you will want to modify the cover if for no other reason than to put your title and author name on it.

Tip: It may be that you want to get rid of the template's book cover and its various pieces immediately, and supply one all of your own. You absolutely can do that; read on to find out what those various pieces are that you'll be discarding.

What follows may seem like a bit of work, but if you have the pictures you want already on hand, modifying the cover takes only a handful of minutes. They're minutes well-spent, too, since an automatically created thumbnail version of the cover is what your reader sees when browsing the bookshelves in the iPad's iBooks app or the iBookstore, and the full-size version is what the reader sees when the book first opens in iBooks. Make your cover distinctive and easy to recognize in the reduced thumbnail size provided in iBooks' bookshelf display and in the iBookstore.

Change the Text Placeholders on the Cover

Every Multi-Touch book template supplied by Apple has a book cover with three text *placeholders* on it (see [Make Placeholders](#) for more about those). One of those placeholders contains the book's title, which is, by default, "Book Title". The others can be used for a subtitle or the author's name. To change the text in any of the placeholders, select it and type your replacement.

The paragraph styles of these placeholders can tell you their intended purposes: *In the Craft template, the small text at the top of the cover has the paragraph style Edition; the text at the bottom has Author. You can see an assigned style in the Styles drawer (if it isn't visible, choose View > Show Styles Drawer [Command-Shift-T]) when you place your insertion point in a placeholder.*

The placeholder for Book Title is rather special: whatever text you type to replace the default title in the placeholder on the cover also appears as the label beside the book cover item in the Book sidebar.

Tip: You can also change the text in the book title placeholder by editing the label of the book cover item in the Book sidebar: click the label to make it editable, make your changes, and then press Enter. The label changes, and so does the title on the book's cover.

Note: The book's title on the cover is an example of an iBooks Author feature known as *updating text* (see [Use Updating Text](#)).

You can modify the typeface and type style of the text in any of the placeholders either by using the commands available on the Format menu, by using the formatting tools available on the Format bar above the main work area when text is selected (if it's not present, choose View > Show Format Bar [Command-Shift-R]), or by choosing a new style from the Styles drawer.

A Family Resemblance

iBooks Author uses text and object formatting tools and menu commands much like those in Pages, Keynote, and Numbers. If you are familiar with any of these programs, you already know how many of iBooks Author's text and graphic manipulation tools and commands work.

In this book, I focus on the tools and commands that are unique to iBooks Author and assume that you know how to do things like change a typeface or a paragraph's justification. If not, consult the iBooks Author Help (in iBooks Author, choose Help > iBooks Author Help); the topics Format Text (under Add and Format Text) and Object Basics (under Graphics, Media, and Other Objects) explain how these tools and commands work.

Change the Image Placeholders on the Cover

In addition to the text, you can change the background art, line art, and any other graphics on the cover. For example, **Figure 19** shows the unmodified book cover from the Craft template and the same cover after I edited the text placeholders and replaced the cover art.



Figure 19: A cover before and after editing.

Here's how I replaced the picture shown on the cover of the book and the background image that appears behind the text and cover picture.

Note: Not all templates provide both a placeholder foreground image and a background image. For example, the Contemporary template has no foreground placeholder image.

Is an image a placeholder? To find out, hover your pointer over it. If it's an image placeholder, you'll see a Help tag that says, "This image is a placeholder. Drag a new media file here to replace it."

The cover's foreground picture was the simplest to change: if a template has a cover picture, it comes as an image placeholder, so, to replace the placeholder picture, you drag a picture of your own over the placeholder and drop it. You can drag a picture from a folder in the Finder, or you can use the Media browser to get a picture from your iPhoto or Aperture library (to bring up the Media browser, click Media in the iBooks Author Toolbar, or choose View > Show Media Browser).

I replaced the dragonfly picture on the Craft template cover with my own picture of the moon above a palm tree, and then I adjusted the picture's mask and magnification to show just the part of the picture I wanted visible (**Figure 20**).

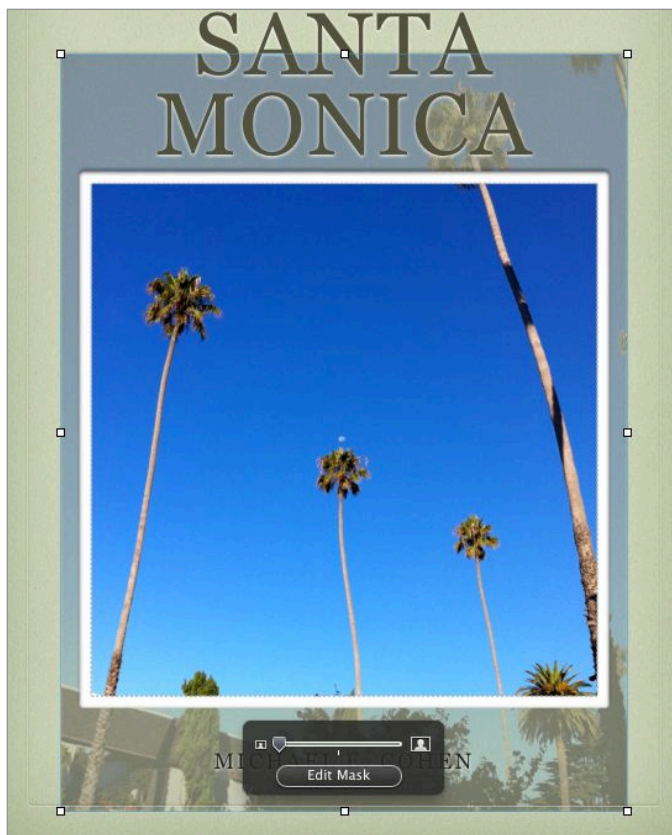


Figure 20: Adjusting the mask and magnification of an image.

To adjust the mask and magnification of a placeholder image, click the picture and then, in the popover that appears, do either or both of the following:

- Drag the slider to adjust the magnification.
- Click Edit Mask, and then drag the image to position it within the placeholder's frame

If you drag without clicking Edit Mask, you can drag the placeholder itself rather than the image within it; you can also use the placeholder's size handles to change its size.

Note: The replacement image that you drop becomes a placeholder as well. You can replace it by dropping another image file on it.

Changing the background image in the Craft template was only slightly more difficult. Instead of being a placeholder image, the background in the Craft template is nothing more than an ordinary image that is layered behind the other items shown on the book cover; replacing it meant that I had to remove it and put another picture in its place. Here are the steps I followed, generalized:

1. Click somewhere on the background image to select it, making sure not to click an item that is on top of the background image (choose View > Show Layout Boundaries [Command-Shift-L] to see the edges of text placeholders). You know you have clicked the right object if you see the square image control handles at each corner of the cover background image (you may not see all of the handles if the image extends beyond the borders of the window).
2. Press Delete. This removes the image, and it gives you a white background.
3. Drag a picture from a folder or from the Media browser and drop it on the cover (but *not* on the placeholder image—you don't want to replace that image). The picture appears, selected, on top of the other items on the cover.
4. If the picture has a frame around it, use the Graphic Inspector to set the picture's Stroke to None (**Figure 21**). Choose View > Inspector (Command-Option-I) if the Inspector is not visible.

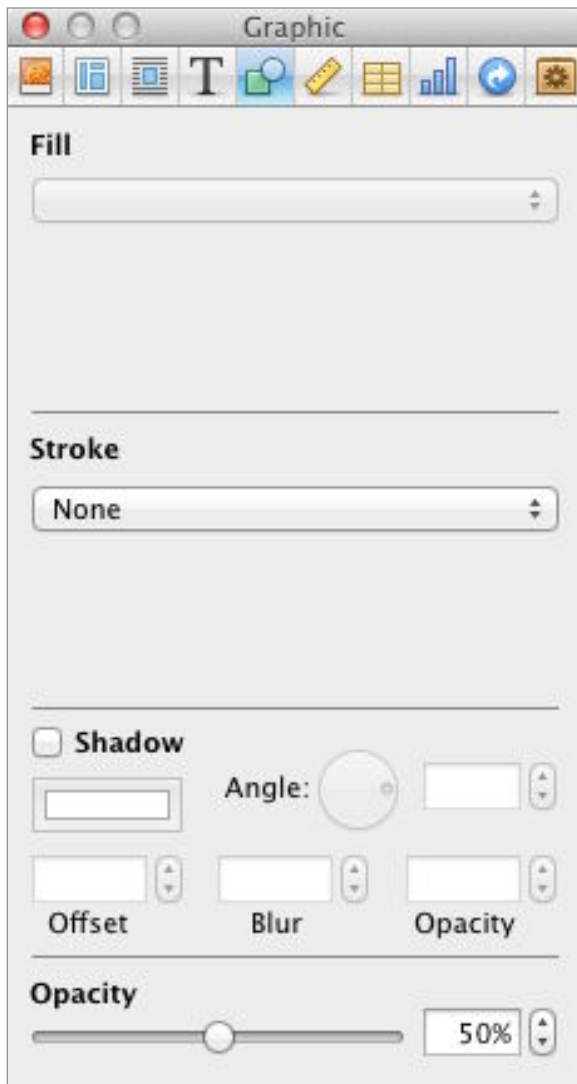


Figure 21: The Graphic Inspector, one of the ten Inspectors available in the Inspector window, is selected at the top of the window.

5. Use the control handles at the edge of the picture to adjust its size, and drag the picture so that it completely overlaps the cover.
6. Choose Arrange > Send to Back (Command-Shift-B).

Tip: You can open more than one Inspector at once: choose View > New Inspector to open a new Inspector, or Option-click an icon at the top of an already-open Inspector to open the Inspector that the clicked icon represents.

Change the Intro Media

Every template provides an Intro Media element as the first thing the reader sees after the cover when the book opens for the first time. It occupies the entire screen. You can use the Intro Media to display a picture (like a traditional book's frontispiece), or to play a video file that introduces the book. To add a graphic or video file, drop it on the Intro Media page from the Finder or from the Media Browser.

You can use most standard image formats for the Intro Media: TIFF, JPEG, PNG, and even Photoshop files work. When you drop an image file on the Intro Media page, you get the same image manipulation popover that I described in [Change the Book Cover](#) (see [Figure 20](#), a few pages earlier). Use this popover to adjust the magnification and positioning of the visible portion of the image on the Intro Media page.

Although previous versions of iBooks Author were somewhat picky about what kinds of media files you could use in a book, including for the Intro Media page, iBooks Author 2 can handle any media type supported by QuickTime. When you drop a video file on the Intro Media page, iBooks Author optimizes it for playback; this may take a minute or so to complete, depending on the size of the video.

A video initially appears centered over a black background on the Intro Media page with a big play button centered on it ([Figure 22](#)).



Figure 22: An Intro Media movie with a friendly Play button.

You can click the big play button to see a preview, but note that this button appears only within iBooks Author. Instead, readers of the book have the standard iPad video playback controls. The Intro Media video begins playing the moment the reader opens that page.

Keep your intro short: Use a short video file (no more than a minute or two) for your Intro Media. This feature is meant to be used as a simple introduction and not anything more substantive. Short and simple is best strategy here.

To adjust the size of the video and its position against the background, use the Metrics Inspector (**Figure 23**). However, you probably won't have to: iBooks Author adjusts the size and position automatically to fill the page and center the video within it.

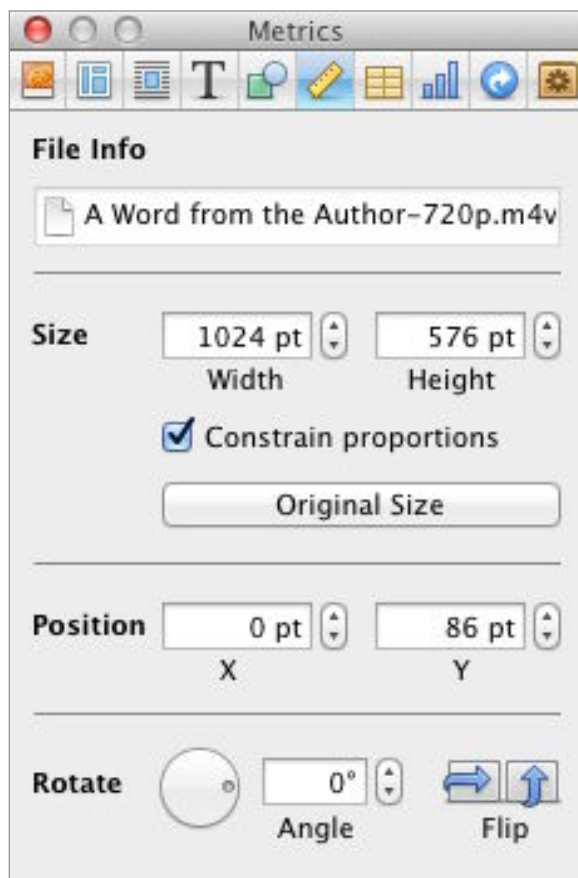


Figure 23: The Metrics Inspector handles resizing and positioning of items on the page.


What about audio? In previous versions of iBooks Author, you could have audio-only Intro Media. However, it was an unsatisfying experience for the reader: The audio had no controls, so the reader saw a black page while the audio played and had no way to pause or rewind the audio.

If you must have an audio introduction, make it into a video file with an image that displays while the audio plays (you can easily make such a movie in iMovie, for example). That way, your reader has something to look at instead of a completely black iPad screen.

Note: If you don't put anything on the Intro Media page, the page doesn't appear in the final Multi-Touch book that you produce.

Change the Table of Contents

For Multi-Touch books based on a Landscape with Portrait template, you have not one Table of Contents but two of them to customize: the one that appears when the user's iPad is held in landscape orientation and the one that appears in portrait orientation. (As you might expect, for Portrait Only books you only customize a single Table of Contents.)

When customizing a Landscape with Portrait template's Table of Contents, you can use the Orientation  control in the iBooks Author Toolbar to view your book in each orientation. I talk more about designing your book for these two orientations in [Flip It for a Different View](#), but here's what you need know about how the Table of Contents appears in each view:

- **Landscape Table of Contents:** In this view, the reader sees the contents list for each chapter on a separate page (**Figure 24**). By default, each chapter's sections are listed on its contents page, and thumbnails of the chapter's pages appear across the bottom of the contents page. In a published book, your readers can tap a thumbnail to go to the corresponding page in the chapter, although in iBooks Author those thumbnails are represented by faint gray translucent rectangles (almost invisible near the bottom of the left-hand image in **Figure 24**) and have no navigational capabilities.

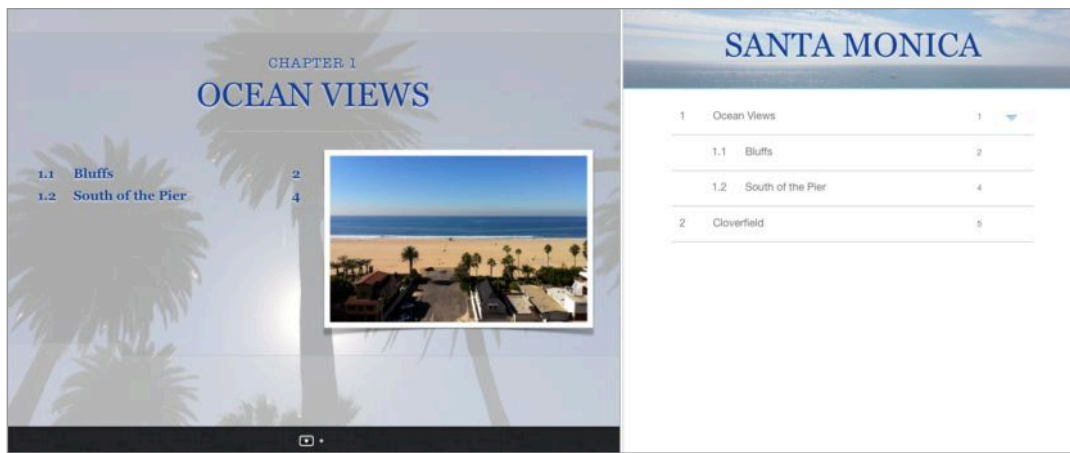


Figure 24: Two views of a Table of Contents, with landscape orientation on the left and alternate portrait orientation on the right.

The different chapters' contents pages in the landscape Table of Contents are reached by clicking the white dots at the very bottom of the contents page; the number of dots indicates the number of chapters (you won't see any dots if you have only one chapter). Unlike the page thumbnails, the white dots *do* work in iBooks Author.

- **Alternate Portrait Table of Contents:** When a reader views your book in portrait orientation, the Table of Contents appears as a scrollable list below a header containing the book's title. Each chapter is listed, and a disclosure arrow to the right of a chapter name expands the list to show that chapter's sections. None of Apple's current templates provide more artwork on the page than a background for the book title banner, so it's quite easy to customize the portrait layout: there's not much to customize!

In neither view can you edit the text that displays the chapter's name, its number, or its sections; that text is automatically generated based upon the chapters and sections currently in the book. You can, however, change the appearance of the text in the Table of Contents. You can also change the background art in either view.

Tip: You can show or hide the page numbers for sections and other headings that appear in the Table of Contents with the Show Page Numbers in TOC checkbox in the Document Inspector's TOC pane.

What about customizing a Portrait Only Table of Contents?

The sole Table of Contents available in a Portrait Only template offers the same features as a Landscape Table of Contents. The techniques for customizing the Portrait Only Table of Contents are the same as for the Landscape Table of Contents, presented just ahead.

Change a Landscape Table of Contents


To change the appearance of the landscape Table of Contents' chapter name and chapter number text items, click the chapter name or number item. Width control handles appear at either end of the item. Now you can do any or all of the following:

- **Change the look of the text:** Use the Font and Text commands on the Format menu or the controls on the Format bar.
- **Adjust the item's width:** Drag the width controls.
- **Reposition the item on the page:** Click within the boundaries of the item and drag.

The text box in the landscape Table of Contents that contains the list of sections within the chapter is just as easy to customize:

- **Adjust the section list's size and shape:** Click within the text box to select it, and then drag any of its control handles.
- **Reposition the section list:** Click within the text box to select it, and then drag.
- **Change the appearance of the section titles:** Double-click any section title shown to select all of them, and then use any of the text formatting tools and commands from the Format menu or the Format bar.

To replace the background, you may be able to follow the same procedure I described for changing the background on the book cover in [Change the Book Cover](#), earlier in this chapter. I say *may* because different templates can implement their backgrounds in other ways:

- **Check for a locked background:** A template might have locked the background image so that you can't inadvertently drag or delete it. You can tell a locked item by very faint X  symbols at its corners and sides where its control handles would normally appear.

To unlock a locked item, click to select it and then choose Arrange > Unlock (Command-Option-L). Once it is unlocked, you can delete it.

- **Check for a placeholder background:** Templates that have placeholder backgrounds are the easiest to change, since you don't need to do anything more than drop a new image on the placeholder to replace the current picture. The Contemporary template, for example, uses a background placeholder on its landscape Table of Contents.

Don't change the foreground placeholder from within the table of contents! Some templates, such as the Craft template that I use to illustrate this chapter, include a foreground placeholder image on the landscape Table of Contents (the dragonfly image in the unaltered Craft template; the view of the ocean in my modified Table of Contents shown in **Figure 24**, slightly earlier). Don't mess with it: that placeholder links to a placeholder image on the first page of each chapter. iBooks Author doesn't give you the ability to remove it from the Table of Contents, and if you replace the placeholder image in the Table of Contents it won't show the image that you use on the first page of the corresponding chapter. See [Make Placeholders](#).

Change an Alternate Portrait Table of Contents

The portrait Table of Contents supplied with a Landscape with Portrait template has very few items that you can change. Each of the nine templates that Apple provides in iBooks Author 2 have portrait tables of contents that contain a text item displaying the book's title; in a few templates this text item appears above a background image. None are more complicated than that.

If the portrait Table of Contents in a template has a background image, you can change it using the same procedure that I describe for changing a book cover's background in [Change the Book Cover](#).

Just as you can with the book title on a book's cover, you can select and edit the text item that displays the book's title on the portrait Table of Contents. Furthermore, just as with the title on the cover, changing the title text on the Table of Contents layout changes the actual title of the book. You also can adjust the title's typeface, size, and position as you can the text on the book's cover.

Additionally on a portrait Table of Contents, you can adjust the height of the banner that contains the book title and background:

1. Position your pointer on the boundary between the banner and the contents list. Your pointer changes to a horizontal drag pointer and a pair of arrows appears (**Figure 25**) on the separator line.
2. Drag up or down to adjust the banner's height.



Figure 25: You can drag the separator in a portrait Table of Contents to adjust the height of the banner.

You cannot change the appearance of the items listed in a portrait Table of Contents: the typeface and layout of the list is hard-wired.

Modify the Layouts

Every template that Apple supplies in iBooks Author has a variety of layouts stashed in it that you can use and modify. Each chapter, section, and page in your book is based upon a layout stored in the template. These layouts dictate where text appears, where page numbers and titles appear, where various graphic elements appear, and what they all look like.

Think about the layouts as being the clothes that the chapters, sections, and pages in a template wear. Just as the same suit can be appropriate for wearing to the office or to the theater, the same layout can be used for very different kinds of content. For example, the layouts in the Classic template, which in the Template Chooser looks like an art history book, could just as easily be used for a botany textbook as could the Basic template, which resembles a botany textbook—just change the artwork in its layouts.

Some layouts are special: *A few templates do have specialized layouts suitable for specific types of content: for example, the Cookbook template offers a Section Recipe layout, and the Photo Book template has layouts designed for photos. Such specialized layouts are a convenience, but don't let the absence of one from a template lead you not to choose that template if it otherwise suits your need: you can make similar specialized layouts in any template with the capabilities that iBooks Author provides.*

When you change the appearance and arrangement of a layout, all your book's pages that use the changed layout take on the new look. You can also create new layouts for chapter openers, section openers, and text pages and save them in your template.

To create new layouts, or to change existing ones, you first must be able to see and select the layouts. iBooks Author has a command for that: View > Show Layouts (or use the View control on the Toolbar to reveal the layouts). When you show layouts, they appear in the left sidebar above the Book sidebar (**Figure 26**).



Figure 26: The Layouts list appears above the Book sidebar when you choose View > Show Layouts.

Note: When you use a Landscape with Portrait template, the layouts you see in the sidebar depend on the orientation you are viewing.

To create a new layout, you must first show the Layouts list in the sidebar and then click a layout to select it. This makes the Insert > Layouts command available, and from it you can choose to insert a new Chapter layout, Section layout, or Page layout into the Layouts list. All new layouts come with the name Untitled master; I suggest that you immediately rename a new layout when you create it, giving it a name that identifies its purpose, such as Answer Key Chapter.

To rename any layout, select the layout in the Layouts list, click within its name to get a text cursor, and then edit as you would any text.

Easier to clone than to create: *New layouts that you insert in the Layouts list are blank, containing none of the graphics and type settings from the template you chose. In most cases, it is much more convenient to duplicate an existing layout from the template, change its name, and then customize the duplicate. To duplicate a layout, select it in the Layouts list and choose Edit > Duplicate.*

Tip: The headings above each group of layouts in the sidebar are editable, and iBooks Author uses them for title prefixes. For example, if you change the Chapter heading in the Layouts sidebar to “Learning Module,” the Chapter Number placeholder on the first page of a chapter uses that as the chapter number prefix: “Chapter 1” becomes “Learning Module 1” and so on.

Tip: Many of the techniques I described for modifying text and image objects in the previous section, [Customize the Opening](#), come into play when you modify a template’s layouts as well, so if you haven’t read that section, you might want to cast your eye back a few pages.

In the pages ahead, I explore the details of how to [Change a Main Chapter Layout](#), [Change a Section Layout](#), and [Change a Text Page Layout](#). With those topics covered, I answer a question that you may begin wondering about as you learn about editing the layouts—how to [Make Placeholders](#). Finally, I describe how to [Save a Template](#) if you want to use it within a different iBooks Author project. But first, some useful terminology.

Tip: As you work through the following sections, remember that you can add new chapters, sections, and pages with the Insert > Pages command. A newly inserted element appears just below the selected element. You can delete an element by selecting it in the sidebar and pressing Delete. To move a chapter or section (though not a page), you can drag it in the sidebar. So feel free to experiment!

Know Your Chapter Layout Terms and Views

The chapter layouts for the landscape layout of Landscape with Portrait templates and the chapter layouts provided by Portrait Only templates offer similar features. I call these layouts *main chapter* layouts, as opposed to the alternate portrait layouts that you also get in Landscape with Portrait templates (see [Choose between Portrait and Landscape Templates](#)).

Tip: To view a main chapter layout if you are working in a Portrait Only template, just select it in the Layouts sidebar. To view a main chapter layout in a Landscape with Portrait template, first switch to Landscape view and then select the layout from the Layouts sidebar.

In Apple’s templates, each main chapter layout consists of two pages or *spreads*: an opening (or *head*) spread and a following text (or *body*) spread. These are presented horizontally so if you can’t locate the second spread, scroll to the right, not down.

In Landscape with Portrait templates, the alternate portrait chapter layout—which you see in Portrait view, like the alternate portrait Table of Contents I describe in [Change the Table of Contents](#)—comprises a large heading area followed by a single, possibly blank, expandable text page area. In the following sections, I deal with changing a main chapter layout and an alternate portrait chapter layout separately.

Change a Main Chapter Layout

The head spread of a main chapter layout typically contains some or all the labeled items shown in **Figure 27**:

- **Chapter title (A):** This text object is hard-wired to display the chapter’s title when a new chapter is created (iBooks Author’s Help calls this an *updating text field*). You don’t change its wording in the layout, but when you change its text in a chapter that uses the layout, whatever you type there changes the name in the sidebar and in the Table of Contents. Double-click the object to see a

popover with which you can make this object display the book's title instead. You can also, of course, move this object around, change its appearance, add your own text to either side of the hard-wired text, and even remove the object.

- **Chapter number (B):** This item contains an updating text field that displays the chapter's number in chapters you create from this layout. Double-click the text to see a popover, from which you can select whether the field displays just the chapter number, the chapter number prefaced by the word “Chapter”, or just the word “Chapter”. (In iBooks Author 2.0, this popover is misleadingly labeled Section Number, even though in this context it controls the chapter number field.) You can modify the appearance of its text, you can add your own text to either side of the updating text field, and you can remove this object. You can override the settings you make here in the individual chapters of your book.

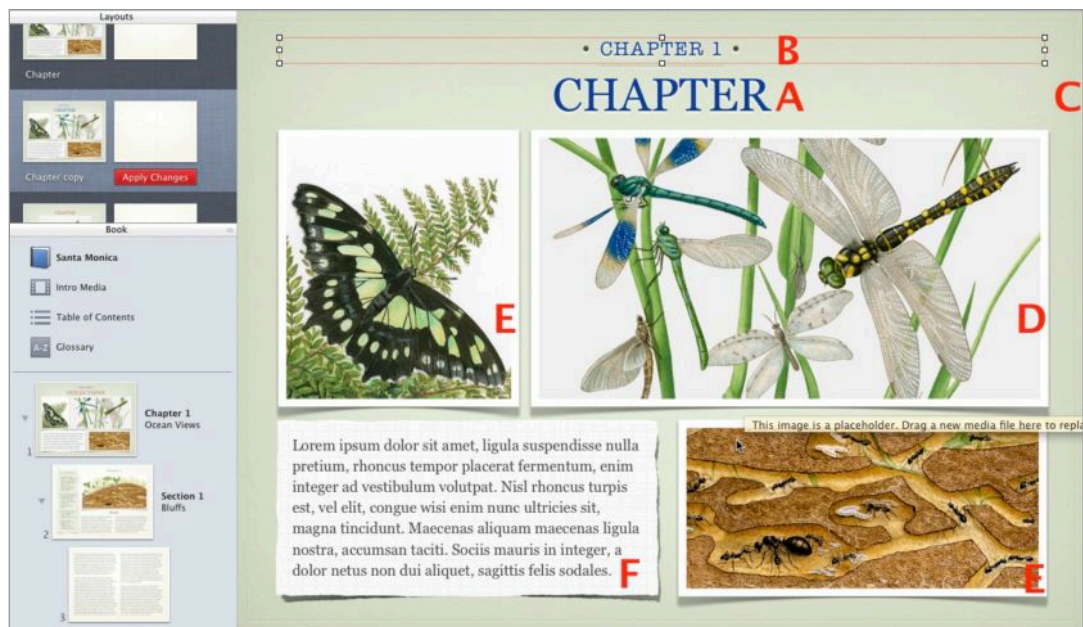


Figure 27: Modifying a main chapter layout from the Craft template with the following parts: chapter title (A), chapter number (B), background (C), main image (D), other placeholder images (E), and introduction (F).

- **Background (C):** This graphic object, when present, is on a layer behind all the other objects on the layout. Just as with Tables of Contents and book covers (see [Change the Book Cover](#) and [Change the Table of Contents](#)), some templates use a placeholder image and others, such as the Craft template in **Figure 27** (above), use a locked image:
 - If the layout uses a placeholder, you can change the background on a chapter by chapter basis by dropping a different image on it in each chapter.
 - If, like the Craft template, it uses a locked background, you can change it in the layout by selecting it, unlocking it (choose Arrange > Unlock [Command-Option-L]), deleting it, and placing a new image behind the others. You can even make it a placeholder image (see [Make Placeholders](#)) in the layout.
- **Main image (D):** Only some templates have a main image object. To find out if yours has one, open the Layout Inspector to its Layout pane. On the main chapter layout, select an image. If the Tag field in the Layout pane says `main image`, then the main image object is selected (see [The Helpful Layout Inspector](#), a page or so ahead).


The main image object is a placeholder: you don't change it in the layout, but whatever you drop on it in a chapter head replaces it for that chapter. This image also automatically appears in the chapter's entry in landscape Table of Contents. You can move this placeholder in the layout and you can resize it—but don't delete it. iBooks Author does not allow you to remove the corresponding placeholder main image object from the Table of Contents, so if you remove it from the chapter layout you'll have to provide an image manually for each chapter displayed in the Table of Contents.

- **Other placeholder images (E):** These are added for decorative purposes, and you can resize, move, or delete them at will.
- **Introduction (F):** You replace the placeholder text in this object with introductory text in each chapter. You can move this object around, adjust its size and appearance, and delete it. It does not participate in the text flow of a chapter (see [Format and Flow](#)), so it is constrained by its size. Note, by the way, that the object in **Figure 27** (above), which comes from the Craft template, has a decorative frame and background; you can adjust it using the Graphic Inspector.


The body spread in a main chapter layout has a body text object, and it is the default layout for the text pages in your chapter that immediately follow the chapter's opening page. The body text object is designed so that text flows from one column to another; if you add a second text page, the text will flow from the first page to the body text object on the second, and so on (see [Format and Flow](#)).

You can replace the background of the body spread, and, if it contains placeholder text, you can change the style, font, size, and other characteristics of its body text object (double-click the placeholder text and use the Format bar, Styles drawer, and various Inspectors as desired). This spread typically also contains a page number text object (it's an updating text field); you can adjust this object's size, location, and appearance as you wish.

Tip: If the body spread in a main chapter layout contains no placeholder text, you can add some to the layout and specify its text characteristics; see [Make Placeholders](#).

When you make changes to either of the spreads of a chapter layout, a red Apply Changes  button appears in the Layouts sidebar. Click it to apply the changes you have made to both the layout and to all the pages in your book that use it.

Tip: You can drag a different chapter layout from the Layouts sidebar and drop it on a chapter in the Book sidebar to apply that layout to that chapter, making it easy to try out different looks for a chapter.

Tip: When thumbnails are showing in the Book sidebar, you can also click the Change Chapter Layout  arrow that appears when your pointer is over a chapter thumbnail to choose a different chapter layout.

The Helpful Layout Inspector

The Layout Inspector is a useful tool when you're noodling around in a layout (**Figure 28**). It has two panes: a Layout pane and a Numbering pane:

- ♦ **Layout pane:** With the Layout pane, you can adjust the size and number of columns of any text object in a layout, specify how placeholders behave (see [Make Placeholders](#)), specify for each object in a layout whether it can be edited on the pages in your book that use the layout, and see if any of the placeholders have names. This last can help you figure out what some of the items in the layout are for (click an object and look at the Inspector's Tag field).
- ♦ **Numbering pane:** You use the Numbering pane to manage how automatic page, section, and chapter numbers appear.

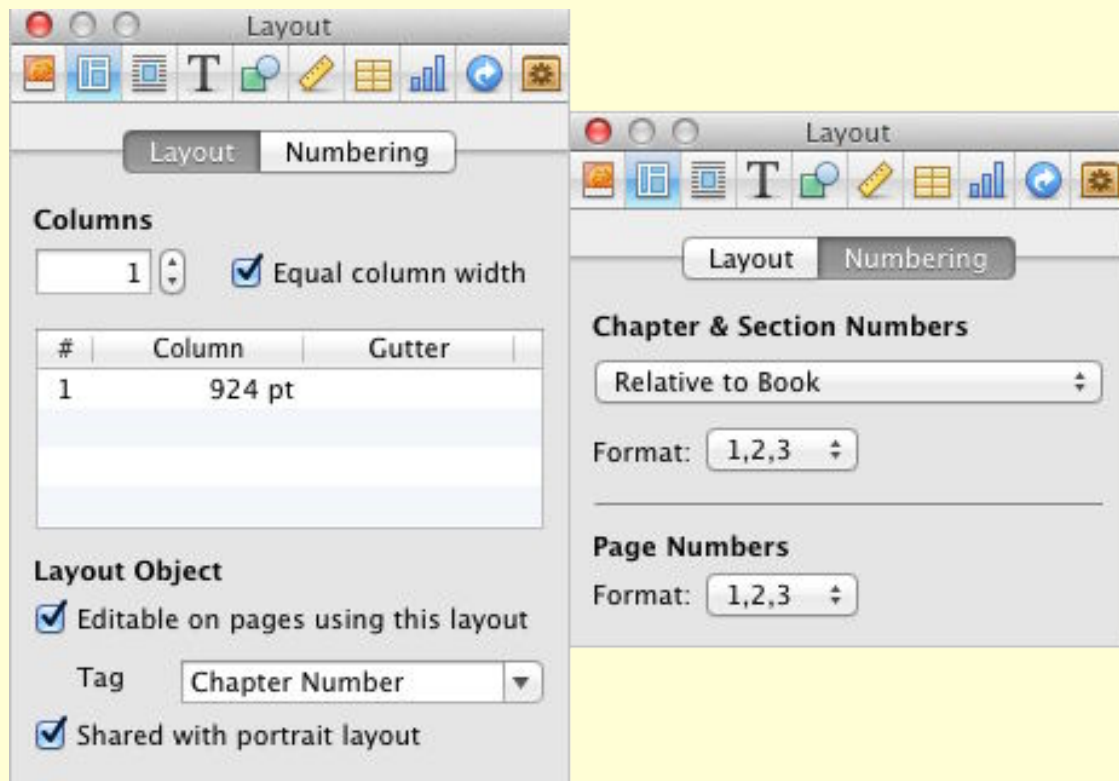


Figure 28: The two faces of the Layout Inspector.

Change an Alternate Portrait Chapter Layout

The alternate portrait chapter layout available in Landscape with Portrait templates typically contains some or all the labeled items shown in **Figure 29**. The chapter title (A), chapter number (B), main image (C), introduction (D), and background of the top (or *banner*) area, function identically to those in the main chapter layouts, as described just previously. However, this layout handles the body text object differently, as does the way it displays images.

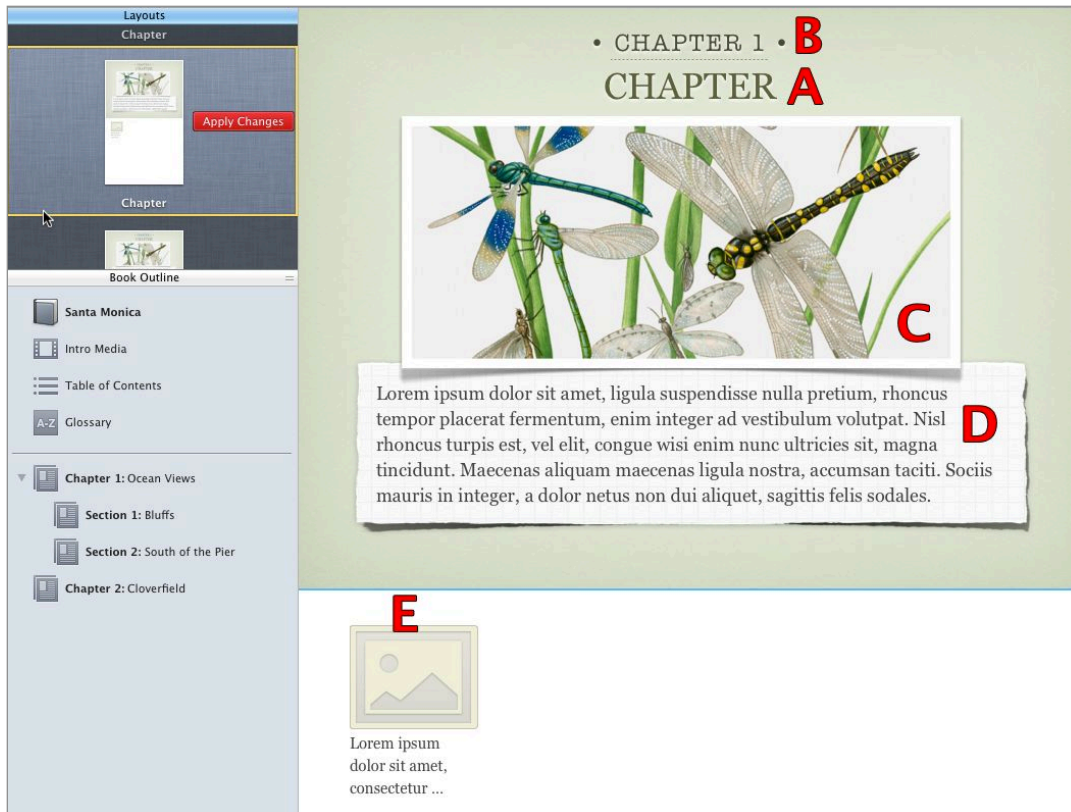


Figure 29: A portrait chapter layout, showing these parts: chapter title (A), chapter number (B), main image (C), introduction (D), and thumbnail track (E).

Some alternate portrait chapter layouts include a body text object with placeholder text below the header. When that is present, you can't adjust its dimensions or the number of columns, but you can adjust its text properties (such as the typeface, size, and so on).

In other alternate portrait chapter layouts, instead of a body text object, you get—nothing. If the corresponding spread in the landscape orientation has text, iBooks Author handles the portrait view text object's dimensions automatically, and applies whatever body text formats you specified in the landscape layout's body spread.

In either case, when you view a Landscape with Portrait book in portrait orientation, the text for a chapter or section appears in a single page below its banner, and the body text object on that page, along with the page itself, grows to accommodate the amount of text it contains, much like a Web page does.

When readers view your book in portrait orientation, floating and anchored graphic objects that you place in the text in landscape view appear as thumbnails in portrait view (I discuss floating, anchored, and inline items in [Add Illustrations and Figures](#)). Readers have to click the thumbnails to see these items at full size. You can use the Layout Inspector when in the alternate portrait chapter layout to hide the thumbnail track of the chapter layout (deselect Show Thumbnail Track), in which case these items don't appear at all in the alternate portrait view.

Note: To appear in the thumbnail track, floating or anchored graphics must have either a title or a caption or be enabled to view as full-screen (described in [Lay Them Out like Widgets](#)). Inline items and widgets always appear within the text in both landscape and portrait orientations.

The Virtues of the Preface Layout

The Apple templates each have two standard chapter layouts: one named Chapter and one named Preface. I've concentrated on the Chapter layout in this section, but the Preface layout has its virtues: in every template it's much less cluttered with items than the Chapter layout. Just because this layout is called Preface doesn't mean that it's only good for book prefaces.

If you desire a sparer, less fussy opening for your book's chapters, consider duplicating the Preface layout and customizing it for all your book's chapters.

Change a Section Layout

Sections allow you to divide the content of your book's chapters into smaller units. For example, suppose your book is *Lives of the Great Poets*, and it has chapters devoted to the poets of different historical periods; your chapter on "English Romantic Poets" might then have individual sections that discuss Shelley, Wordsworth, Coleridge, and

Byron, with the opening pages of the chapter devoted to describing the historical period in which they lived.

iBooks Author can easily support a book structured like that: as you’ve seen in [Know Your Chapter Layout Terms and Views](#), chapters in a book begin with a head page and then, optionally, one or more body text pages; in the alternate portrait view of a Landscape with Portrait book, they begin with a banner and then, optionally, one expandable body page. Following the chapter’s body pages, you can place one or more sections (usually more, because a chapter with only one section would seem odd).

Sections in chapters always appear at the end of chapters:

A chapter doesn’t have to contain sections, but if it does, the sections always follow the body pages, if any, of the chapter; if a chapter has no body pages, the sections follow the chapter’s head page or banner.

Note that “end” does not imply “an addendum following the chapter’s main contents.” In many cases, most of a chapter’s contents will appear within the chapter’s sections and not in the body pages following the chapter’s head page. In such cases, the end is much larger than the head (as is the case, I fear, for many of us).

Also note that sections do not *have* to be part of a chapter: you can place sections outside of chapters, standing on their own at the same level as the book’s chapters. For example, **Figure 30** shows the outline for a book in which a stand-alone section follows the second chapter.

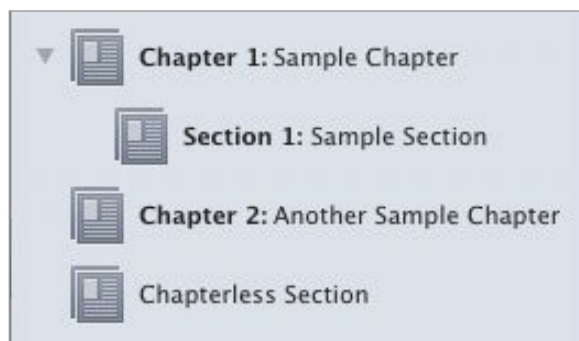


Figure 30: A book with one section inside a chapter and one section standing on its own.

Tip: You can switch what's displayed in the Book sidebar between Page Thumbnails and Book Outline (shown in **Figure 30**, above) with either the View menu or the View tool on the Toolbar.

iBooks Author provides several standard section layouts that you may want to place on their own outside of any chapters; for example, the Copyright and Foreword section layouts. **Figure 31** shows the standard section layouts provided by iBooks Author's Classic template; different templates may provide a somewhat different assortment.

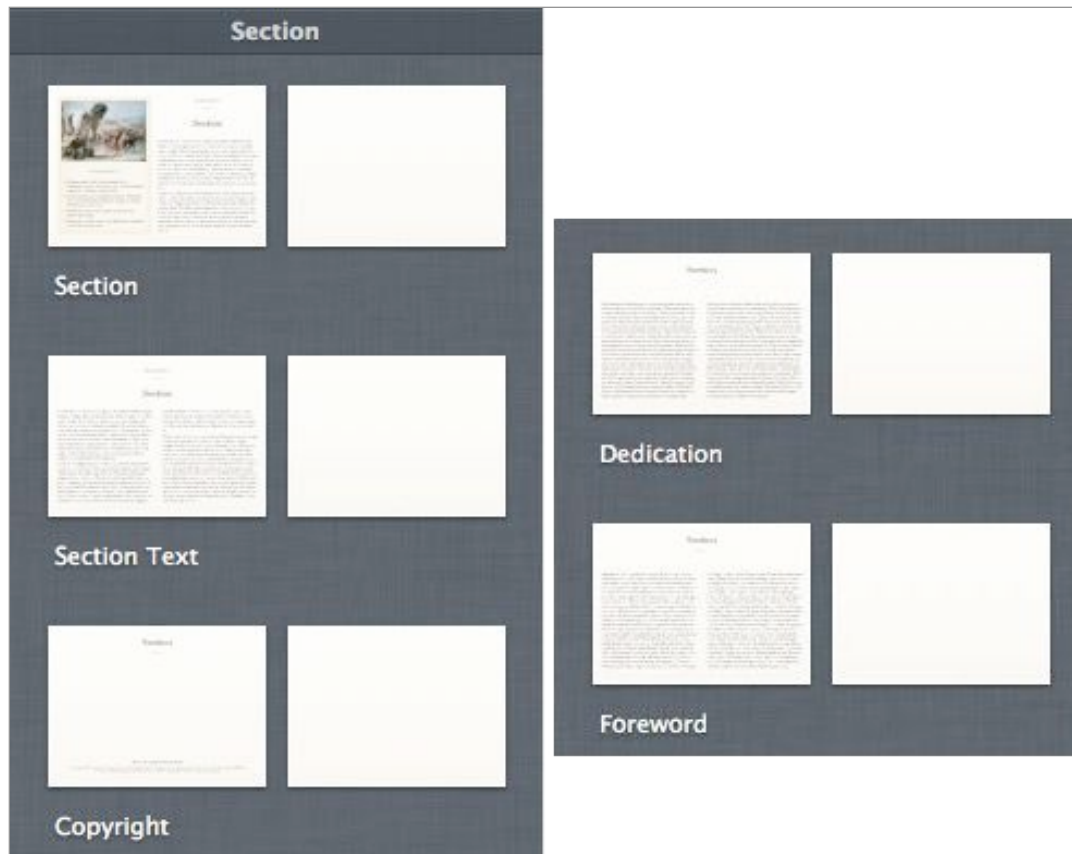


Figure 31: The section spread layouts in a template (this one is from the Classic template).

Here are descriptions of typical section spread layouts in the Apple templates:

- **Section:** Most book templates include one or more section layouts with names that begin with *Section*: Section, Section Text, Section 1 Column, and so on. These layouts are designed to hold the bulk of your content and you'll typically use one or two of them for most of the sections in your book.

Some Section layouts have a *section image* placeholder (sometimes accompanied by a text placeholder for a caption). All of them have a *body* text placeholder that flows into subsequent body pages in the section (see [Format and Flow](#)). They also tend to have *section title* and *section number* placeholders with updating text items similar to those in the chapter title and chapter number placeholders (discussed in [Change Main a Chapter Layout](#)). Section layouts typically include a page number placeholder with an updating text item that supplies the number.

Sometimes a Section layout has an *objectives* text placeholder. This is where you would put the learning objectives for that section, or a list of the main points covered in the section; the objectives placeholder's default format is an automatically numbered text list with a heading. **Figure 32** depicts the Section layout from the Editorial template.



Figure 32: A typical Section layout; this one is from the Editorial template (it must have been a very inflammatory editorial).

Tip: If your section needs neither an objectives item nor a picture on its opening page, you can usually find a layout that is text-only, such as the Section Text layout shown in **Figure 31**, just a little earlier.

- **Copyright:** Use this section layout for the copyright page(s) of your book. It contains a section title text object with an updating text item that controls the section's name in the Table of Contents just like the other section and chapter layouts do.

The default name for a newly created section is “Untitled,” although you will probably change it to something like “Copyright” if you use this layout for its intended purpose. It has no section number placeholder because copyright pages are seldom numbered. The body text placeholder is typically bottom-justified in the Copyright layout for each template: as you add information, the text grows toward the top of the page. If you supply a great deal of copyright information, this text object flows its contents into the body text pages of the section (see [Format and Flow](#)). The updating text item in the page number placeholder is usually set to show lowercase Roman numerals, though you can change that in the Numbering pane of the Layout Inspector (read [The Helpful Layout Inspector](#)).

- **Dedication:** If your book has a dedication, you can use this layout. It has the typical section title placeholder that links to the Table of Contents, a page number placeholder set up to show numbers in Roman numerals, and a body text item set for italics (though you can change this). It has no section number placeholder. Most dedications are short, but if you have a large number of dedicatees, the text of this placeholder flows into subsequent text pages.
- **Foreword:** Use this for books with forewords. Like the other section layouts designed for a book's front matter, the section title links to the Table of Contents, the page number is set to show Roman numerals, and it lacks a section number placeholder. Some Foreword section layouts include an italicized quotation block for an epigraph along with an attribution block followed by normal body text in the body text placeholder (**Figure 33**), though you can delete or modify the appearance of any of these blocks if you want.

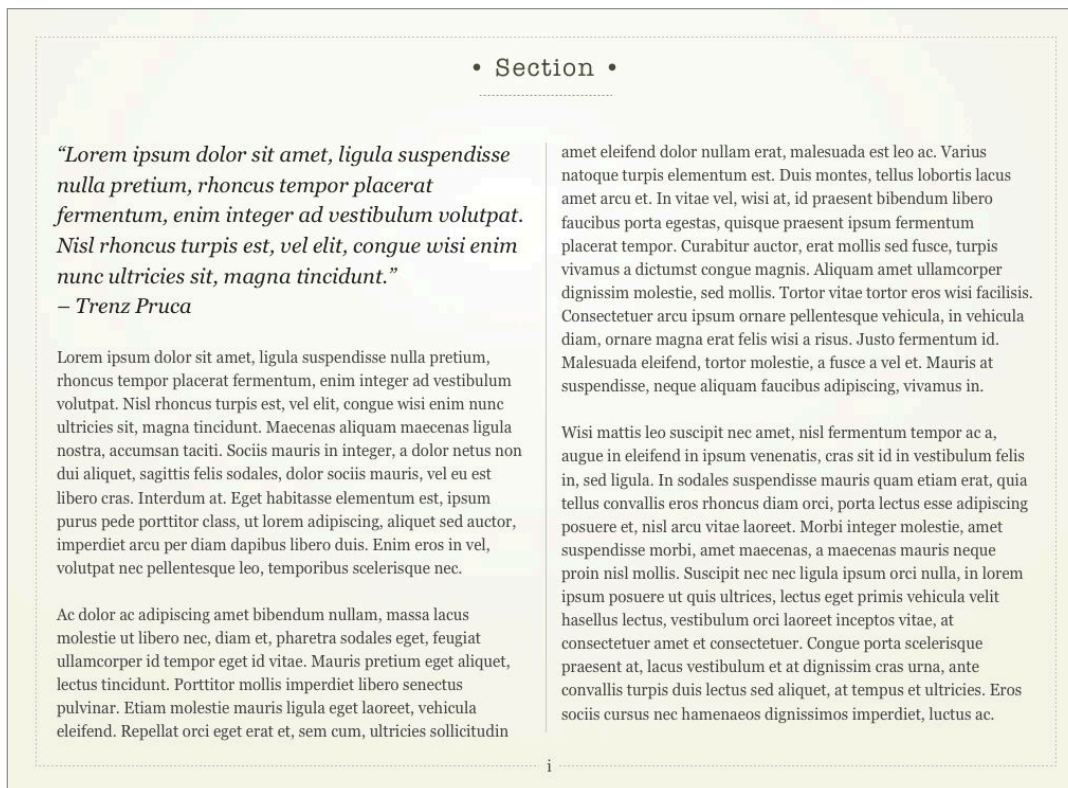



Figure 33: The Foreword layout from the Craft template, including placeholder text blocks for both an epigraph and its attribution.

Tip: As with chapters, when thumbnails are showing in the Book sidebar, you can click the Change Section Layout  arrow that appears when your pointer is over a section thumbnail to choose a different section layout.

Each landscape view section layout has a matching alternate portrait view section layout in a Landscape with Portrait template. The alternate portrait view layouts for sections are similar to the alternate portrait view chapter layouts described in [Change an Alternate Portrait Chapter Layout](#): they each have a resizable header area that has text and image placeholders, and a scrolling page below that contains an optional thumbnail track. And, like some alternate portrait chapter layouts, you can modify the text format of the scrolling page in alternate portrait section layouts.

Generally, you should duplicate any layout you want to modify so you can revert to the original if necessary. You use the same techniques for changing the appearance and objects that you use when modifying chapter layouts (see [Change a Main Chapter Layout](#)), so I won't describe them here.

Tip: You can make modified versions of the special purpose section layouts for other standard book parts. For example, the Dedication layout can easily be used for Acknowledgements, and the Foreword is equally useful for a Conclusions section.

Importing Tips

As you learned back in [Import Text](#), you can import Word or Pages documents as chapters or sections. What's more, if the document you import has section breaks in it, the import process uses those breaks: if you import the document into a chapter layout, iBooks Author creates a new chapter at each break; if you import into a section layout, iBooks Author creates a new section at each break.

This has some drawbacks. When you import into a chapter layout, you end up with a series of chapters that have no internal sections. If you want those chapters to have internal sections, you have to create those sections in iBooks Author and then cut and paste from the chapter's body text into each section.

Similarly, when you import into a section layout, the text is split up into sections within the chapter currently selected in the iBooks Author sidebar, skipping the body text of the chapter opening. If, however, you want the first section that you imported to be the body text of the chapter opening, you have to cut its text from the first section, paste it into the chapter's body text, and then delete the first (now empty) section.

Or, instead, you can carve your document up ahead of time:

1. In your word processor, cut the first section, create a new document, paste the text, and save the new document as a separate document. For a typical chapter, you end up with two documents: a chapter opening document and a chapter section document, with the second document containing all but the first section of the chapter.
2. Import the chapter opening document into a chapter layout.
3. Import the chapter sections document into a section layout for that chapter.


Sure, it sounds tedious, but you can carve up an entire book-length manuscript in this fashion in less than an hour.

Change a Text Page Layout

Each of the Apple templates comes stocked with individual page layouts, usually offering a main text placeholder with varying numbers of columns, and sometimes offering sidebars or placeholders for images in addition to a main text placeholder. You use the page layouts either to change the layout of an existing page in your book or to add blank pages with a specific layout following the existing pages in a chapter or section.

Note: Remember that in a Landscape with Portrait layout, page layouts only can be applied to the landscape view of your book; in the alternate portrait view, the body of a chapter or section is one long ever-expanding page.

To replace the layout of an existing page with another layout, do the following:

1. Select the page in the Book sidebar (if necessary, choose View > Page Thumbnails first).
2. Click the Change Page Layout arrow  that appears to the right when your pointer is over the thumbnail.
3. On the Change Page Layout menu that appears, choose the layout you want to apply to the page (**Figure 34**). The text reflows to accommodate the new layout. Note that if you apply a blank page layout to an existing page that contains text, the text flow jumps over the blank page to the next available text body page in the chapter or section.

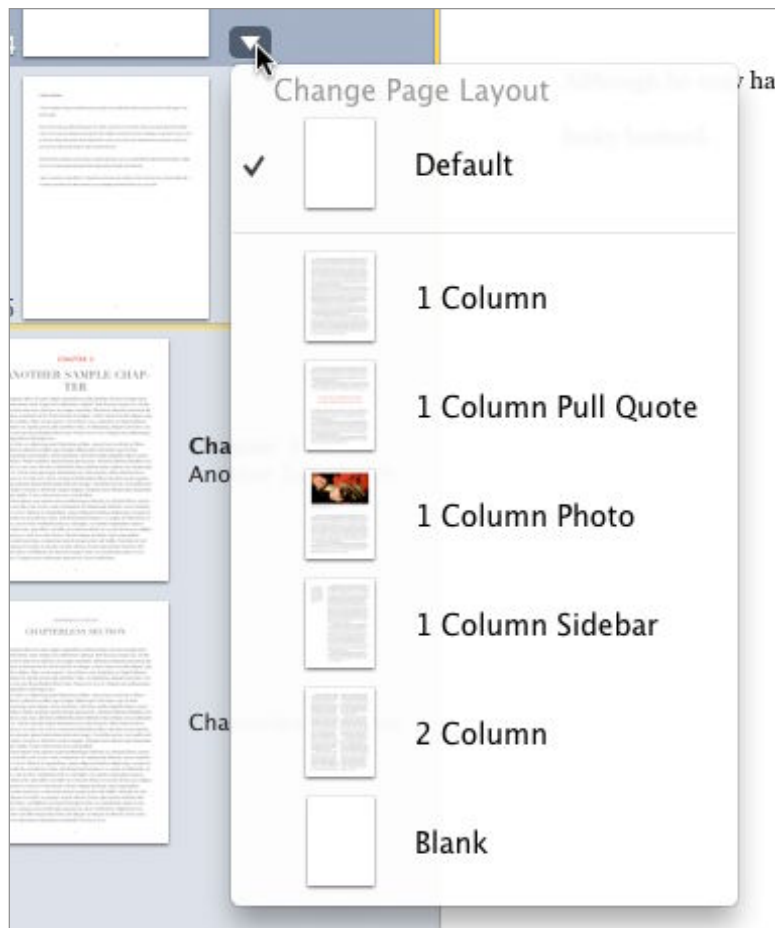


Figure 34: Applying a new layout to an existing text page.

Adding a page to a chapter or section is even easier: click the Add Pages tool on the Toolbar, or choose Insert > Pages, and choose a page layout from the Pages submenu. A page with the layout you have chosen appears at the end of the currently selected chapter or section.

You can create new page layouts in the Layouts sidebar or modify existing ones as you can with section and chapter layouts. As with chapter or section layouts, I suggest you duplicate any layouts you want to change and modify the duplicates; the duplicates, which you can—and should—rename, appear on the Pages and the Change Page Layout submenus when you create them.

The page layouts are mostly about the body text, so when you're modifying a page layout, most of your work will involve changing the main text placeholder's typeface, default justification, and other characteristics, though, if a layout has additional text placeholders, such as one for a sidebar, you may want to change that, too.

Here's a general guide to changing a text placeholder in a layout (or, for that matter, on any given page in your book):

- **Default justification, tab stops, list characteristics, line spacing, and paragraph indents:** Select a text placeholder in a page layout and use the various controls in the Text Inspector.
- **Border and background fill of the body text:** Select a text placeholder and use the controls in the Graphic Inspector.
- **Typeface, size, color, and style:** Select the placeholder text *within* a text placeholder and use the controls on the Format bar or the commands on the Format > Text submenu.
- **Number of columns, column widths, and gutters:** Select a text placeholder and use the controls in the Layout Inspector.

Tip: Except for a Blank page layout, which has none, the body page layouts all have a body text placeholder object through which the text of the chapter or section flows. You can, however, have more than one body text placeholder object through which text can flow if your page design requires it. For details, read [Format and Flow](#).

Make Placeholders

If you've been reading along in this chapter, you probably already have an idea of what placeholders are, since they appear as standard parts of the book parts and layouts I've been describing. Here's a closer look at these very useful items.

A *placeholder* in iBooks Author is either any contiguous run of text or a media element (including simple graphics) that you, as the book's author, can replace in one fell swoop (this should particularly appeal to authors of falconry textbooks). For a media placeholder, you drop new media on the placeholder to replace it. For a text placeholder, you just click the text: the entire placeholder text is selected and the next thing you type—or paste—replaces that text.

A placeholder has no distinct appearance to set it apart; the placeholder simply contains the replaceable text, graphic, or media. Think of *placeholderishness*, if you will, as an optional property that text or media can have within iBooks Author. When you publish a book, the placeholder property evaporates in the published book,

leaving the contents of the placeholder behind: placeholder text becomes text, and placeholder media becomes media.

How you make a placeholder depends on where it is: placeholders can exist both in your layouts and on individual pages. Placeholders on a book page are best for marking individual items you know you want to change before you publish; in this case the placeholder is a reminder for the thing to be changed. A placeholder in a layout appears every time you use the layout, and is suitable for marking where a replacement is needed for each occurrence of the layout.

Because iBooks Author doesn't make it easy for you to spot a placeholder, you should use text or images that remind you of the sort of information that the placeholder represents (for example, AUTHOR'S NAME is good placeholder text for where you want to insert the author's name).

Make Placeholders on a Book Page

Although placeholders really reveal their full splendor in layouts, they can have practical uses on individual pages. For example, you may want text placeholders on your book's copyright page for the ISBN and Library of Congress Cataloging-in-Publication (CIP) information that you'll replace just before you finish your book, or you may want a media placeholder for an image that has several alternatives upon which you haven't decided yet (or for which you haven't yet obtained rights).

Here's how you make a text placeholder:

1. Select the text you want to make into a placeholder.

Leave the final paragraph marker alone: If the selected text comprises one or more paragraphs, make sure not to include the final paragraph mark (you can see those with View > Show Invisibles [Command-Shift-I]); otherwise, when you replace the placeholder text, the last paragraph of your replacement becomes the opening text of the following paragraph because the concluding paragraph break in the placeholder text has vanished.

2. Choose Format > Advanced > Define as Placeholder Text (Command-Option-Control-T).

As you might expect, you can turn a text placeholder back into ordinary text just as easily:

1. Click the placeholder text to select it.
2. Choose Format > Advanced > Define as Placeholder Text (Command-Option-Control-T) to uncheck the command and make the selected placeholder text ordinary.

How to Edit Placeholder Text

If, as you work on your book, you realize that you need to edit placeholder text but still keep it as a placeholder, Choose Format > Advanced > Enable Placeholder Text Authoring.

When this command is enabled, you can edit your text placeholders with impunity. Just remember to disable placeholder text authoring when you're done fiddling so your text placeholders behave like placeholders again.

Here's how to make a media placeholder:

1. From the Media browser in iBooks Author or from the Finder, drag the media you want to make into a placeholder and drop it on the page.
2. Modify the media object as you wish, such as adding a border or a shadow.
3. Choose Format > Advanced > Define as Media Placeholder (Command-Option-Control-I).

Media placeholders remain placeholders until you publish your book, even when you replace their media with different media, or until you select a media placeholder object and choose the Format > Advanced > Define as Media Placeholder command again to deselect it. Unlike text placeholders, there is no command for enabling or disabling media placeholder editing.

Make Placeholders in a Layout

The procedures for making text and media into placeholders on a chapter, section, or page layout are identical to those for making placeholders on a book page. However, the helpful Layout Inspector has a few controls that appear when you edit objects on a layout.

Collected under the heading Layout Object, these controls affect placeholders and how they behave (**Figure 35**).

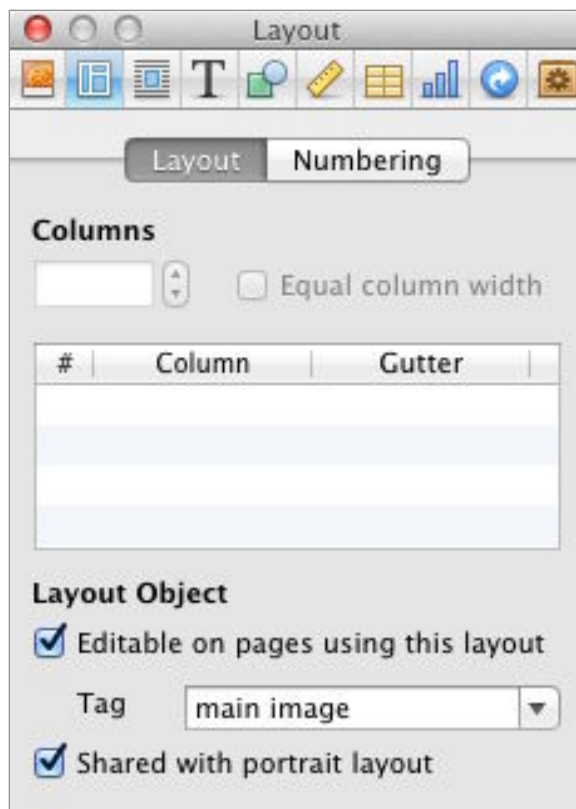


Figure 35: The Layout Object section in the lower half of the Layout pane in the Layout Inspector has controls for placeholder behavior.

Here's what the Layout Object controls do:

- **Editable on Pages Using this Layout:** Select this box if you want to be able to replace the placeholder contents on pages that use this layout. When this box is not checked, you can replace placeholder contents only when you edit the layout itself, but not when you edit pages that use that layout. In most cases, you want to have this box selected so you can replace the placeholders' contents on the pages that use the layout.
- **Tag:** This item is enabled only if Editable on Pages Using this Layout is checked. You can type a tag in this item in the Layout Inspector, or you can choose an existing tag from the pop-up menu. Individual tags can only appear once in each layout.

Tags allow placeholders on different layouts within a book to share contents. The main image placeholder object, described in [Change a Main Chapter Layout](#), is implemented with a tag that says `main`

[image](#). That is how the chapter entries shown in Table of Contents in the Craft template, each of which has a placeholder with a [main image](#) tag, keep their images in sync with your book's chapters (see [Change a Landscape Table of Contents](#)): whatever image you put in the main image placeholder in a chapter opening appears in the corresponding chapter entry in the Table of Contents.

- **Shared with Portrait Layout:** As you have seen in [Change an Alternate Portrait Chapter Layout](#) and [Change a Section Layout](#), not all items in a landscape layout appear in the alternate portrait layout in a Landscape with Portrait template. You can make a layout item you create in a landscape layout appear in the alternate portrait layout by checking this option. (This checkbox, by the way, is present in Portrait Only templates, but is always disabled.)

Save a Template

If you go to the trouble to customize a template, you might want to leverage your labors by saving the template so you can use it in another book. That's easy enough to do:

1. Choose File > Save as Template.
2. Optionally, rename the template (if you don't, the template has the same name as your book).
3. Click Save.

By default, templates are saved in the depths of the Library folder in your user account, at `~/Library/Application Support/iBooks Author/Templates/My Templates/`. Templates in that location appear in the Template Chooser. If you save them somewhere else, they don't appear in the Template Chooser; the only reason to save them elsewhere is if you plan to archive them or give them to someone else.

Note: Your user account's Library folder is normally invisible in Lion and Mountain Lion. That's why the steps below use the Go command to reveal the folder.

To remove a custom template from your Template Chooser:

1. In the Finder, choose Go > Go to a Folder (Command-Shift-G).
2. In the dialog that appears, type (or copy and paste from this ebook) the full path from the Library folder in your user account to your My

Templates folder ([~/Library/Application Support/iBooks Author/Templates/My Templates/](#)) and then click Go.

3. Drag the template out of the folder to the Trash.

If you want to add an iBooks Author template from some other source (say, from your publisher) to your Template Chooser, put it in the My Templates folder.

Format and Flow

Back in [How to Think about Your Book](#), I talked about how your book's text forms the spine of your book. However, just as the human spine isn't a single piece but comprises separate vertebrae, your book's text spine comprises individual text flows that are contained within your book's separate sections and chapters.

Note: You can move these text-flow-containing sections and chapters around in your book and replace them, but you can't rearrange or replace the pages that participate in a specific text-flow. Remember, the smallest units you can drag around in the Book sidebar are chapters or sections.

Here are some of the things you can do with the text in your book:

- You can insert new text blocks on a page so that the text flows through them (described just ahead).
- You can break a text flow off. Read the details ahead, in [Break a Text Flow](#).
- You can create text blocks that are independent of a text flow. For details, see [Create a Stand-alone Text Object or Shape](#), later in this chapter.
- You can [Format Text](#). This includes changing the typeface, style, size, and other visual characteristics of any text within your book, whether it is part of a text flow or not.
- You can [Use Updating Text](#)—such as a section or page number—in a text flow or a stand-alone text object.

Note: The following discussions of modifying a text flow are irrelevant when it comes to the alternate portrait view of a Landscape with Portrait book. As I explore more fully in [Flip It for a Different View](#), each section and chapter in the alternate portrait view has only one scrollable page.

Create a New Text Object within a Flow



All the flowing text in your book appears within text objects and, usually, you get these from the layouts used in your book. You may, however, need to create new text objects within a text flow for any pages that have special layout requirements where none of the standard page layouts serve. For example, if you need a page with text objects at the top and bottom but a large middle area for an illustration, you can do this by inserting a blank page between two existing pages that are part of the chapter's or section's text flow, creating a new text object at the blank page's top that receives the flow from the previous page, and then creating a new text object at the bottom that receives its flow from the top object.

Each text object that is part of a text flow shows controls at its borders, when selected, that you can use to alter the text flow. To select a text object, as opposed to selecting the text *within* it, click the object's border. If the text object has no visible border, move your pointer over the object: when you get near any of its edges, a dashed-line appears that represents the border of the text object.



Tip: Choose View > Show Layout Boundaries (Command-Shift-L) to see the borders of a text object and to make it easier to select the object.

If the text object is at the beginning or in the middle of a text flow, you see a small blue ■ rectangle at its upper-left and lower-right. If the text is at the end of a text flow, the rectangle at the lower-right displays a small arrow ➤ symbol instead of a blue rectangle. To also see blue connection lines showing the links between text objects in the flow; choose Format > Text Box > Show Connection Lines.

Spotting Unflowed Text with the Clipping Indicator

If the text object is at the end of a text flow but has additional text that hasn't yet been flowed into another text object, a clipping indicator  appears at the bottom-center of the object. You'll see this indicator often when you edit text objects in a chapter, section, or page layout because the placeholder text in the templates frequently extends beyond the objects in the layout. The clipping indicator  also appears at the bottom of stand-alone text blocks that contain more text than they have room to display.

To create a new text object that is part of a text flow, do the following:

1. Click the edge of the text object that contains the flow that you want to divert into a new text object so that you see the text flow control rectangle at its lower-right (either a blue  rectangle or an arrow  symbol).
2. Click the text flow control rectangle. Your pointer changes its appearance and instructions appear (**Figure 36**).

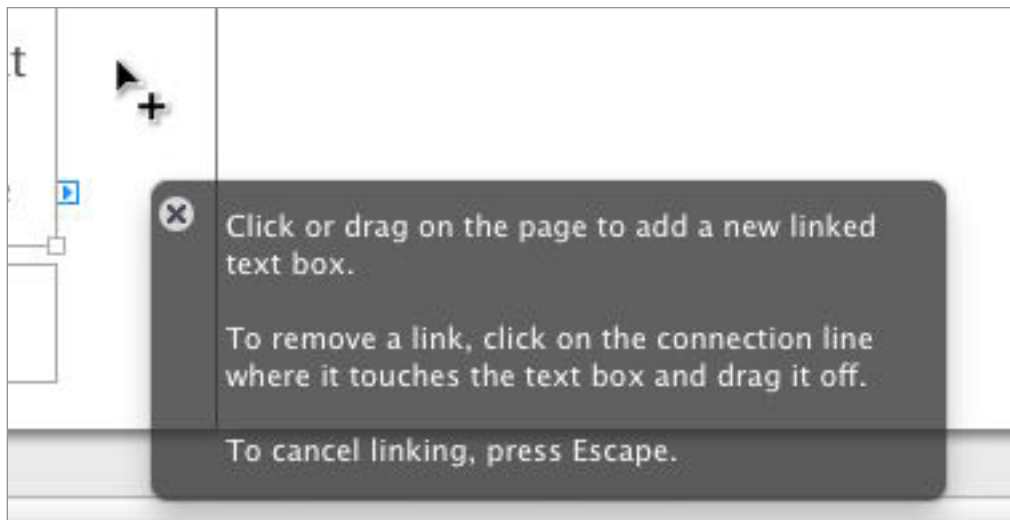



Figure 36: In the process of diverting the text flow to a new text object, the plus (+) badge on the pointer indicates that a new text object linked to the flow will be created where you click or drag.

3. Elsewhere, either on the same page or the following page (and preferably in a blank area on the page), confirm that your pointer has a plus (+) badge and then drag to create a new text object with the shape and dimensions that you desire. (If you prefer, you can, instead, click to create the object and then move it and adjust its dimensions separately.)

When you finish, the text flows from the previous text object to the new one and from there, if necessary, into the flowing text objects that follow it in the section or chapter.


Break a Text Flow

In the rare case that you need to break a text flow, you use the same control rectangles described in [Create a New Text Object within a Flow](#). When you break a text flow off, you don't lose the text that was broken off, though: it remains, metaphorically dammed up, within the current last object in the flow. The clipping indicator  appears at the bottom-center of that object to let you know there is more text available to flow.

Note: Don't confuse deleting a page with breaking a text flow. When you delete a page that is part of a text flow, the text flow continues downstream to the next available page, if any, in the current chapter or section.

Break with caution! *The text objects downstream of where you break a text flow no longer participate in the flow, and cannot be made to join it again. You either have to create new pages for the text to flow into, apply a page layout that contains a flowing text block to a page that follows the break-off point, or make new objects to pick up the flow from where you broke it using the techniques described in [Create a New Text Object within a Flow](#).*

Here's how to break the text flow:

1. Select the text object by clicking its border so you see its text flow control rectangles, and then click the blue rectangle  near the bottom-right of it to keep the text from leaving it. Instructions appear, and the pointer changes its appearance (as shown in **Figure 36**, previously).
2. Whether you have chosen to show connection lines or not, move the pointer away from the text flow rectangle control and then back to it. Your pointer changes to show a minus (-) badge (**Figure 37**).
3. Click the text flow control rectangle. An animated puff of smoke appears, and the link is broken.

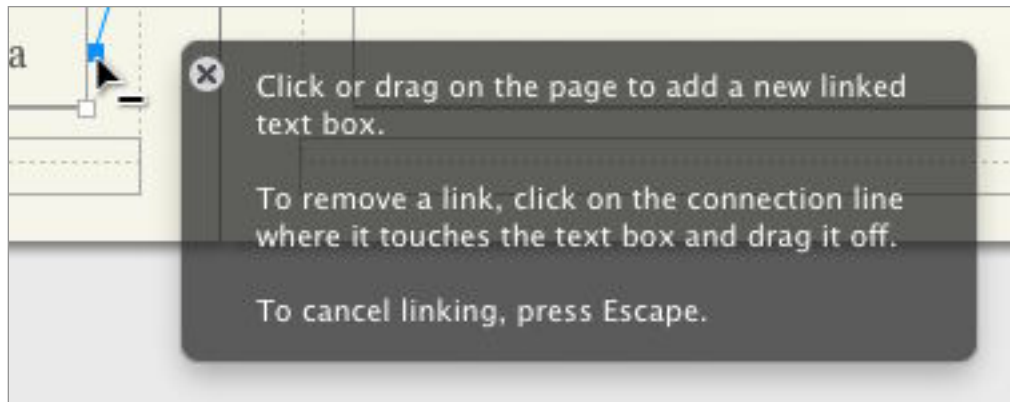


Figure 37: On the verge of breaking the text flow where it flows out of the selected text object, note the minus (-) badge on the pointer.

When you break a text flow, the text object remains selected so you can click a visible text flow control rectangle to redirect the flow elsewhere.

Create a Stand-alone Text Object or Shape

Although flowing text constitutes the spine of your book, it's not the only sort of text you can have in your book. You've already seen some examples, such as the Introduction text that can appear at the beginning of chapters (see [Change a Main Chapter Layout](#)) or the Objectives text object that appears in some section layouts (see [Change a Section Layout](#)). iBooks Author has two tools on its Toolbar that enable you to add stand-alone text items to a page: Text Box and Shapes (**Figure 38**).

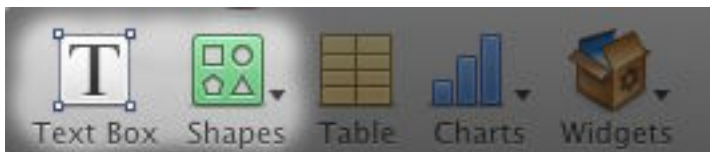


Figure 38: The two leftmost tools at the center of iBooks Author's default Toolbar provide ways to add stand-alone text to a page.

To add a text box to a page, click the Text Box tool (or you can, if you prefer, choose Insert > Text Box). A small text box appears at the center of the currently displayed page, containing the placeholder text, "Type to enter text." You can use the control handles to reshape and resize it, and you can use iBooks Author's text formatting tools to alter the appearance of the text in it (**Figure 39**, left).

Similarly, many of the shapes available from the Shapes tool (or from the Insert > Shape submenu) can hold text (**Figure 39**, right). These

shapes include rectangles, stars, ovals, diamonds, callouts, polygons, and quote bubbles—in fact, any available shape that has sufficient width and height to enclose text. Like a text box, shapes containing text can be reshaped, resized, moved around, and have their appearances modified.

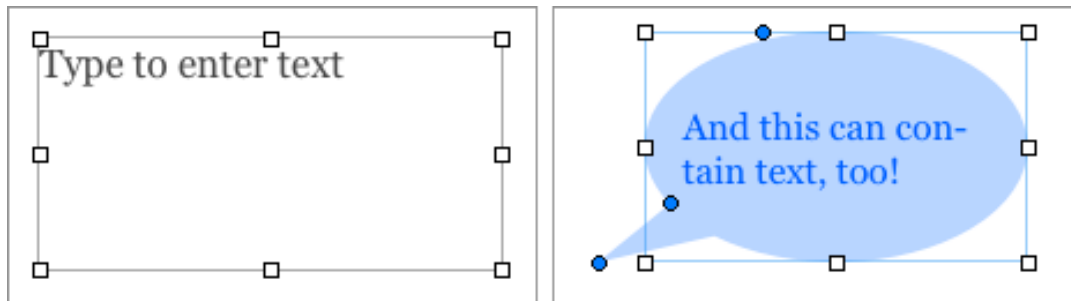


Figure 39: A text box (left) and a filled shape (right) can both contain text, and they can be resized, reshaped, and moved around.

I'm not going to cover in detail all the ways you can modify the appearance of a text box or shape. However, here are the Inspectors you likely will use to do that:

- **Graphic Inspector:** Use this to provide and customize a fill, stroke (that is, a visual boundary), and a shadow. You can also adjust the object's opacity.
- **Metrics Inspector:** This can modify the box's or shape's size, position, and its rotation (yes, you can have a text box displaying text at a 30-degree angle if you want).

Tip: To rotate the shape but make the text horizontal, choose Format > Shape > Reset Text and Object Handles after you rotate it.

- **Text Inspector:** This powerful Inspector gives you control over a whole range of text-related properties, including text color, background color, character spacing, inset from the borders of the object, bullets and numbering, text alignment, and much more. I suggest you spend some time playing with this Inspector and a text-filled shape to discover what effects it can achieve. It's a metric ton of power in a small floating window.

In addition, you can, of course, format the text itself, which I cover next.

Format Text

iBooks Author, like most other Apple applications that provide word-processing capabilities, provides myriad menu commands, Inspectors, and tools for modifying text appearance and layouts. As I pointed out earlier, in [Change the Book Cover](#), iBooks Author's text manipulation commands are nearly identical to those in Pages, Keynote, and Numbers, and I won't go into the details of how they all work here.

However, I want to make one important point about text formatting in iBooks Author: the Format bar, which is visible by default in the iBooks Author main window (and, if it isn't, choose View > Format Bar [Command-Shift-R]), is the best place to go first when you need to format text in your book (**Figure 40**). Why? Because iBooks Author produces books that can be read only on the iPad, and although the other tools available, such as the Fonts window (Format > Font > Show Fonts [Command-T]), work just dandy in iBooks Author, the menus on the Format bar provide only those fonts and styles that are available on the iPad.



Figure 40: The Format bar. From left to right, here are the tools you can use to format text: Font Family menu, Typeface menu, Type Size menu, Text Color tool, Text Background Color tool, Text Style buttons, Justification buttons, Line Spacing menu, Columns menu, and List Styles menu.

Along with the Format bar, you can, and should, use the Styles drawer to format paragraphs and arbitrary runs of text. This drawer, much like the Styles drawer in Pages, enables you to create standardized styles for characters, lists, and paragraphs, and to apply the styles in Apple's templates. Formatting the text with styles helps you achieve visual consistency in your book. The iBooks Author Help topic, *Format Text Using Styles*, provides a concise illustrated description of how styles work in iBooks Author.

Use Updating Text

Updating text fields are runs of text that iBooks Author generates for you. To insert one of them into your text, choose it from the Insert menu. iBooks Author provides these updating text fields:

- **Section Title:** This is something of a misnomer, since it doesn't always insert a section title. For example, if you are working on

a chapter page that is not part of any section, choosing Insert > Section Title inserts the chapter title.

- **Section Number:** Again, a misnomer, this inserts either the current section number or, if you are working on a page that isn't part of a section, the current chapter number. By default, iBooks Author prefaces the number with the word *Section* or *Chapter*.
- **Page Number:** Use this to insert the current page number in your text. This updating text is of particular use in chapter, section, or page layouts to provide a page number at the bottom or top of the page. Note that when you view a Landscape with Portrait book in portrait orientation, any updating page number within your text will show up as 1 (see [Flip It for a Different View](#)).
- **Page Count:** Use this field to insert the current number of pages in your book.

You can change what the Section Title and Section Number updating text fields say when you insert them: Control-click (or right-click) the updating text to modify what they display. You can Control-click a Section Title updating text field to have it show the chapter title or book title instead; for Section Number fields you can choose whether the section or chapter number is displayed, and whether it is prefaced by the word *Section* or *Chapter*.

Take care when editing updating text fields! If an updating text field displays a chapter or book title and you edit it, you also end up editing not just the field but also the actual title of the chapter or book.

Add Your Assets

Textbooks, as I said back in [What Is a Textbook?](#), contain much more than text. They're usually loaded to the bindings with pictures, figures, charts, tables, and other non-textual items. These are not included merely to grab and hold the attention of otherwise bored students (though any teacher who's wrangled a roomful of active 10-year-olds will smile and say that is reason enough), but to provide additional instruction and insight.

Multi-Touch books created by iBooks Author expand the range of available content to include audio, video, 3D models, interactive presentations, and more. I strongly recommend that you start by reading [Add Illustrations and Figures](#) (just ahead), to learn the essentials of how to add the available kinds of non-textual assets to your book so they appear how and where you want them, with the correct label, number, and caption.

Once you've mastered the basics of asset placement, feel free to skip around to learn how to add different kinds of assets to your book:

- [Add Images, Shapes, Tables, and Charts](#)
- [Add Audio and Video](#)
- [Add Galleries](#) (these are like slideshows)
- [Add Keynote Presentations](#)
- [Add Interactivity](#) (these images have clickable labels that provide more details and zoom the image)
- [Add Scrolling Sidebars and Pop-Overs](#)
- [Add 3D Objects](#) (these COLLADA images can be rotated in your book)
- [Add HTML](#) (these Dashboard widgets can be complex to create, but they can also add sophisticated options to your book)

Finally, you can learn how to sanity-check a book's alternate portrait view in [Flip It for a Different View](#).

(And what about quizzes, glossary items, and index entries? I cover *those* in the next chapter, [Include Study Aids](#).)


Add Illustrations and Figures

iBooks Author provides you with many ways to illustrate your text. Some illustrations may consist of nothing more than page art, such as a separator line between columns of text, or a decorative image to fill out a page. Others may be complex assemblages of shapes and labels, such as a flowchart. Still others may be bar charts or pie charts, or tables of figures. And then there are images, videos, and the widgets described earlier in [Plan for Interactivity](#). When I write “illustration” here, I mean any of these items, including widgets.

Getting illustrations into your book is one thing; making them look the way you want once you get them there is another. In this topic I explain not only how to position them where you want them, I also explain how to add labels that automatically update, such as figure or chart numbers.

Learn to Wrap

How your book’s text flows over or around an illustration, and whether the illustration moves as you add or remove text, depends on the illustration’s placement properties; that is, whether it is a *floating*, *inline*, or *anchored* object:

- **Floating:** A *floating* object stays on the page where you put it, and only moves when you manually reposition it.
- **Inline:** An *inline* object is part of the text flow itself. It moves every time the characters surrounding it in the text move. For example, the small arrow pointer image following this word  is an inline image.
- **Anchored:** When an object is *anchored*, it has an anchor point within the text, but can appear anywhere on the page that you place it. Anchored objects stay on the same page as their anchors; if you add or remove text from the text flow and cause an anchor to move to a different page, the anchored object moves to that page as well, but retains its position on the page.

For example, you can anchor an image to text that appears near the top of the page, but place the image itself in the lower-right corner; if the anchor moves to a different page, the object moves to that page as well and takes up its position in the lower-right corner.

See the next section, [Lay Them Out like Widgets](#), to find out how to manipulate the anchor point.

Remember the alternate portrait view: As noted in [Change an Alternate Portrait Chapter Layout](#), unless a floating or anchored object in landscape view has a title or caption or can be made full-screen (see [Lay Them Out like Widgets](#)), it vanishes in the alternate portrait view of a book based on a Landscape with Portrait template. You can use this feature to your advantage: untitled and uncaptioned floating or anchored graphics can be decorative in the normal landscape view, but not clutter the thumbnail track in the alternate portrait view.

You control an object's placement properties, and how text wraps around it, with the Wrap Inspector (**Figure 41**); a subset of wrapping options are available on the Format bar when an object is selected (**Figure 42**).

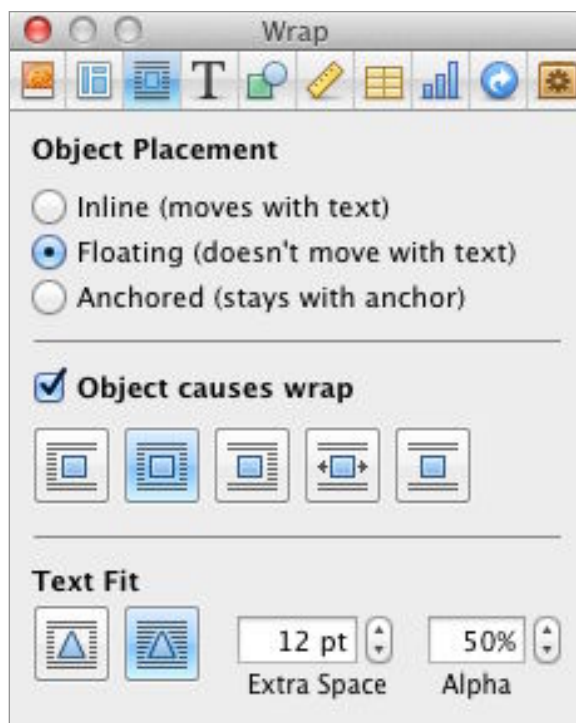


Figure 41: The Wrap Inspector controls (what else?) how text wraps around a non-text object in your book.



Figure 42: The Format bar offers quick access to wrap controls when an object on the page is selected.

iBooks Author imposes some rules on which objects can have which object placement properties:

- Only images, single shapes, and grouped shapes (see [Add Images, Shapes, Tables, and Charts](#)) can be made inline. This rule implies the following rules...
- Widgets, as well as shapes and images that have titles, captions, or both (see [Lay Them Out like Widgets](#), immediately following), cannot be placed inline. However...
- Any object can be made to float or be anchored.

Note: You can slide an object that appears in the thumbnail track of the alternate portrait view anywhere along the track in that view without affecting its position in the landscape view.

Tip: Hover your pointer above each of the wrap control icons in the Wrap Inspector to see what the control does.

Lay Them Out like Widgets

You might guess that you would modify how objects placed on the page lay out by using the Layout Inspector, but you'd be wrong: whether it is a shape, a picture, a widget, a text box, or a chart, you actually lay it out with the Widget Inspector. For layout and interactivity purposes, iBooks Author treats *every* object on the page—with the exclusion of inline objects and text boxes that are part of the text flow—as a widget.

With the Widget Inspector's Layout pane (**Figure 43**) you can add titles and captions to an object, specify where they appear, put a background behind the object and specify its margin.



Figure 43: The Layout pane of the Widget Inspector, where you can arrange the titles, captions, and backgrounds of on-page objects, and include a description that the iPad can read aloud to vision-impaired readers.

For some objects, you can use the Widget Inspector's Interaction pane (covered near the end of this topic) to specify whether the object expands to fill the screen when the reader taps it, and whether it appears on the page as a thumbnail or at a size you set manually.

Figure 44 shows the parts of a typical object on the page; in this case, the photograph laid out by the settings shown in **Figure 43**, above.

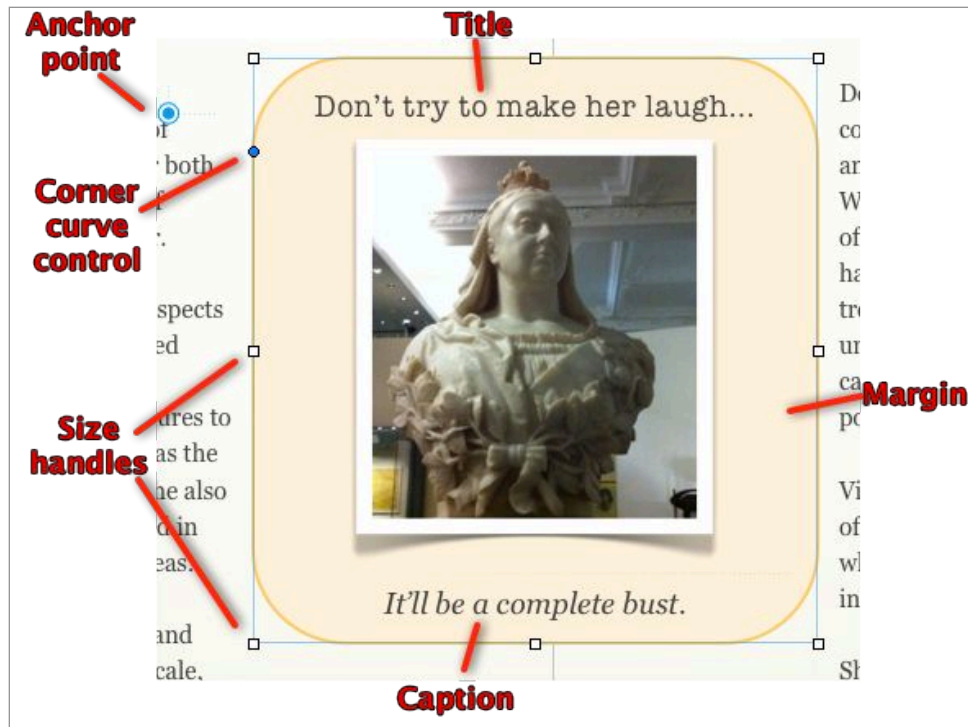


Figure 44: An object on the page, with various parts labeled.

Here are how the labeled items in **Figure 44** (above) work, moving clockwise from the top:

- **Title:** Check the Widget Inspector's Title checkbox to include a title with a selected object. When you give an object a title, the object is placed within a default frame for the template. You replace the placeholder title text with the title you want.

If you pick an option other than None from the Inspector's Label pop-up menu, the title is prefaced by a label, such as [Figure](#), and, optionally a number. Choose Edit Label Styles from the pop-up menu to modify the list of labels that can preface a title, the character style that is applied to the title, and the numbering scheme used for the title, if any.

- **Margin:** The amount of space, in typographer's points (about 1/72nd of an inch), between the object and its frame. The Margin slider in the Inspector controls this.
- **Caption:** When this option is checked in the Inspector, additional placeholder text appears. Use the caption to provide additional text to describe the object. You can write more text than fits in the space provided: in the book, your reader can scroll through the text.
- **Size handles:** These appear around any object on a page when it is selected. You know how they work: drag them to change the size and shape of the object. The size handles shown in **Figure 44** (above) affect the frame around the image; if you click the object within the frame, you see size handles around it instead.
- **Corner curve control:** This tiny blue control appears at the top-left of a framed object when you give it a title or caption with the Widget Inspector. Drag it along the edge of the frame to control the curvature of the frame's corners.
- **Anchor point:** This appears somewhere on the page for every anchored object. Drag it to whatever place in the text you want to be the object's anchor (see [Learn to Wrap](#)).

Tip: You can control where the title and caption appear in relation to the object within the frame by choosing an item from the Layout pop-up menu in the Widget Inspector.

Tip: You can specify whether the object has a colored or graphic background behind it in the Widget Inspector. You must select Title or Caption (or both) and then you can select Background. To adjust the appearance of the background and the border, or *stroke*, of the frame, use the Graphic Inspector or the Format bar.

Be accessible: *If you're concerned about vision-impaired readers (and you should be whether or not your book must comply with Section 508, the U.S. government's requirement for providing access to the disabled—see <http://www.section508.gov/index.cfm?fuseAction=Laws>), you can type text that describes the object in the Accessibility Description field of the Widget Inspector. By default, iBooks Author populates this field with the title and label, if any; if there is a caption but no title, iBooks Author uses the caption. VoiceOver on the iPad reads the accessibility description aloud when a reader taps the object in the book or drags a finger over it.*

Finally, the Widget Inspector has a second pane: Interaction. Although this pane comes fully into play when managing an interactive object, as you'll see elsewhere in this chapter, it has two options that affect the layout of floating and anchored objects: the Make Full Screen on Tap and the Full-Screen Only checkboxes.

These two checkboxes work together like this:

- For an object to appear on the page at any size you manually set, but to expand to fill the iPad screen when the reader taps it, check Make Full-Screen on Tap.
- For an object to appear as an automatically-sized thumbnail in the text but to expand to fill the screen when the reader taps it, check Make Full-Screen on Tap and then check Full-Screen Only. You cannot check Full-Screen Only unless Make Full-Screen on Tap is already checked.

When an object appears as a thumbnail in the text, you get an Edit Frame button attached to the thumbnail: click it and you can customize the frame of the full-screen version that your reader sees in iBooks.

Make Full Screen on Tap and the Alternate Portrait View: *In a book based on a Landscape with Portrait template, floating or anchored objects appear as thumbnails in the alternate portrait view when Make Full Screen on Tap is checked, whether or not the object has a label or caption.*

Add Images, Shapes, Tables, and Charts

As you saw in [Change the Book Cover](#), you can drag an image from the Media browser or the Finder (or even, for that matter, from another application such as a Web browser) into an image placeholder in iBooks Author. However, dragging images isn't just for placeholders: you can drag any compatible image (that is, JPEG, PNG, or GIF) into iBooks Author to put it on a page. By default, the dropped image becomes an anchored object, but you can change that with the Wrap Inspector or the Format bar (see [Learn to Wrap](#)).

Tip: If you hold down Command while dragging and dropping an image, iBooks Author places it on the page as an inline object rather than as an anchored one.

As I also described previously in [Create a Stand-alone Text Object or Shape](#), you can use the Insert menu or the respective tools on the Toolbar to put shapes and text boxes onto a page. By default, the objects are placed as floating objects, but, again, a trip either to the Wrap Inspector or the Format bar can change that.

You can build complex objects by adding shapes, images, and text boxes to a page, customizing their appearance, moving them around, arranging them with the commands on the Arrange menu, and then grouping them all together by choosing Arrange > Group (Command-Option-G). **Figure 45** shows a simple grouped object that has been given a title and a background with the Widget Inspector.

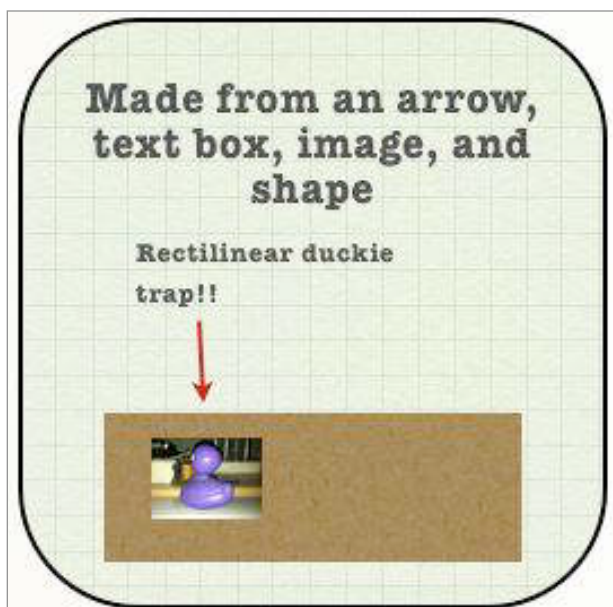


Figure 45: Build your own diagram from shapes and text boxes.

Tip: Once you group several objects into a grouped object you can group it with other objects, themselves either simple or grouped. Groups within groups within groups...

You can even build tables or charts out of assemblages of objects—but you don’t have to: iBooks Author provides both a Table tool on the Toolbar that inserts a table on the page and a Charts tool right next to it from which you can choose a chart type from a healthy assortment. **Figure 46** shows a pie chart and grain table created by these tools.

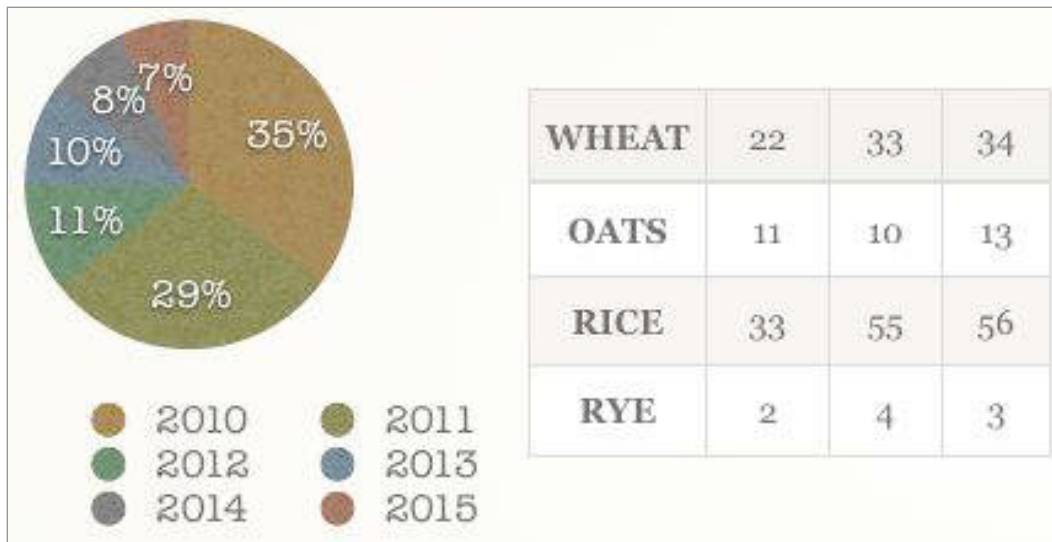


Figure 46: The Table and Charts tools make the presentation of statistics and tabular data easy.

You can produce sophisticated charts and tables with their respective Inspectors: the Table Inspector and Chart Inspector provide almost exactly the same functionality as their counterparts in Apple’s Pages. The iBooks Author Help topics, Tables and Charts, are reasonably thorough, so I won’t dwell on the functionality of the available Inspectors and commands here.

Neither charts nor tables are static within iBooks Author: the Table Inspector even provides a basic formula editor so your table can do simple calculations, and the Chart Inspector has a Chart Data Editor that updates the chart’s appearance when you change the data. However, the calculation and chart update capabilities only exist in iBooks Author: the charts and tables that the reader sees in iBooks are static snapshots of your charts and tables.

By the Numbers

iBooks Author can even represent complex mathematical equations in a Multi-Touch book using LaTeX and MathML. Read the Apple article, “iBooks Author: About LaTeX and MathML support” (<http://support.apple.com/kb/HT5321>) for a complete description of this capability, along with specific examples.

Add Video and Audio

The tools and templates provided by iBooks Author go to great lengths to create the illusion that Multi-Touch books are “just like real books.” Once a book begins to talk and its illustrations start to move, however, that illusion is shattered. But that’s a good thing.

Adding a movie or an audio clip to your book consists of a single step: drag a compatible video or audio file from the Finder or from iBooks Author’s Media browser to the page. When you do, iBooks Author immediately creates a Media widget and places the media you dragged within it (**Figure 47**).

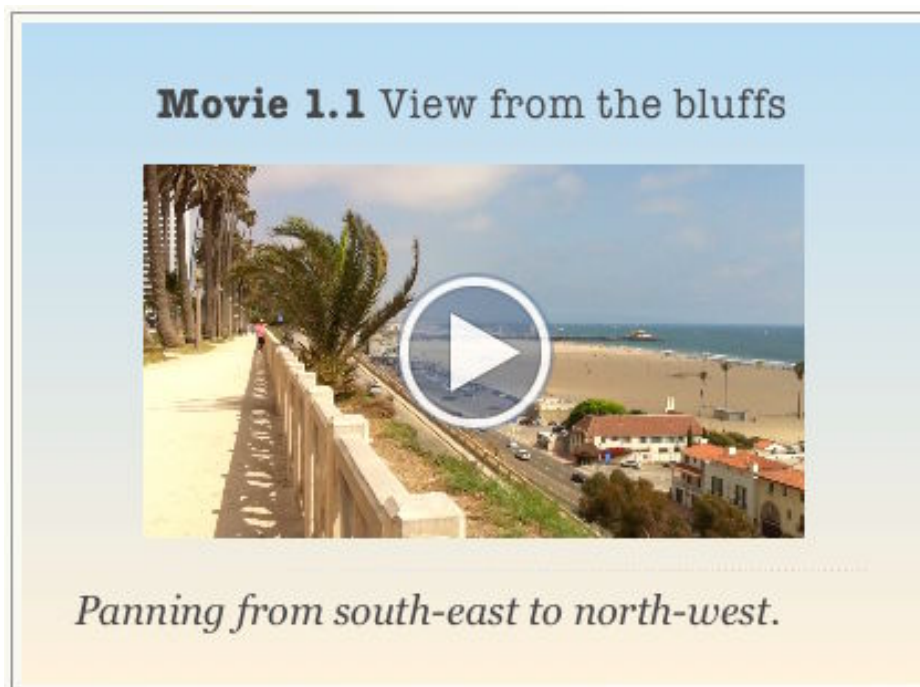


Figure 47: Media widget with a video and a customized background.

iBooks Author 1 limited you to just a few specific audio and video formats; iBooks Author 2 loosens those restrictions by making use of the QuickTime software included in Mac OS X to convert and optimize the media you place in your book into a format that the reader's iPad can handle.

Note: The media conversion and optimization step can take some time, ranging from seconds for a very short media file to many minutes for a longer file. See <http://support.apple.com/kb/ht3775> for a list of the media formats that QuickTime can support.

Once your Media widget is in place, you can customize it with the tools and techniques described earlier in this chapter, in [Add Illustrations and Figures](#): change its background, adjust its size and borders, modify its title and caption, and so on.

You also want to look at, and possibly adjust the settings, on the Interaction pane of the Widget Inspector (**Figure 48**).



Figure 48: The Interaction pane of the Widget Inspector provides these controls when a Media widget containing video is selected.

With the Interaction pane, you can do the following with a Media widget:

- **Control playback:** You, as the book's author, can use the controls under the Controls heading to preview your media. These controls do not affect the published book; they're for your convenience.

Tip: Although you can't use the controls under the Controls heading to set a start and stop point for your media's playback, QuickTime Player in Mac OS X offers a Trim function you can use to trim a video or audio file before you import it into iBooks Author.

- **Control looping:** The Repeat pop-up menu controls whether the widget loops back to the beginning and starts playing again or simply stops when it reaches the end. Looping media might be used when your readers need to listen repeatedly to short pronunciation samples or to view short videos of complex processes that require repeated viewings to understand.
- **Restrict playback to full-screen:** Available only for video, the Full-Screen Only option restricts the widget to play its contents only in full-screen (in which case the widget on the page is displayed as a thumbnail that the reader must tap). You should consider choosing Full-Screen Only if the media contents require the iPad's full screen to appear to their best advantage, or if space is at a premium on the page where the widget appears.
- **Choose a poster frame:** A *poster* frame is the video frame that appears before the video starts playing; this option is not present for audio-only media widgets. If the video in a widget begins with a blank frame, moving the Poster Frame slider to select a nonblank poster frame from elsewhere in the video gives your widget a more interesting appearance. When you click the poster frame in iBooks Author, the video plays from where you set the poster frame; however, when a reader taps the poster frame in the finished book on an iPad, the video plays from the beginning.

When you add an audio file, the top portion of the Layout Inspector's Interaction pane provides three options for playback controls (see **Figure 49** a little bit ahead for examples):

- **Button:** This option presents the audio playback control as a simple button within the frame that contains the widget's label and caption. In the finished book, your reader can tap this button to start and stop playback. If the reader stops playback before the audio has reached the end, the next tap picks up where the playback left off. iBooks Author tries to conserve space on the page with this option: you cannot adjust the width or height of the frame containing the widget. I recommend, therefore, that you keep your captions and labels short when you use this option so you don't end up with long skinny swaths of text in the widget frame.
- **Scrubber bar:** Use this to provide readers with the most control over audio playback. Readers can drag the playback head in the bar to move to any part of the audio they wish to hear. You can control the width and height of the widget on the page: the wider you make the widget, the wider the scrubber bar becomes, making it easier for a reader to position the playback head accurately.
- **Image:** An image that you drop on the widget provides the playback control with this option; for example, you might use a picture of Thomas Edison as a playback control for an audio recording of the inventor. When the reader taps the image on the iPad, the playback commences, a second tap stops playback, and a third tap starts playback again from the beginning of the audio. In iBooks Author, however, clicks on the image do not start or stop playback: instead, you can use the playback controls in the Widget Inspector's Interaction pane to play the audio.

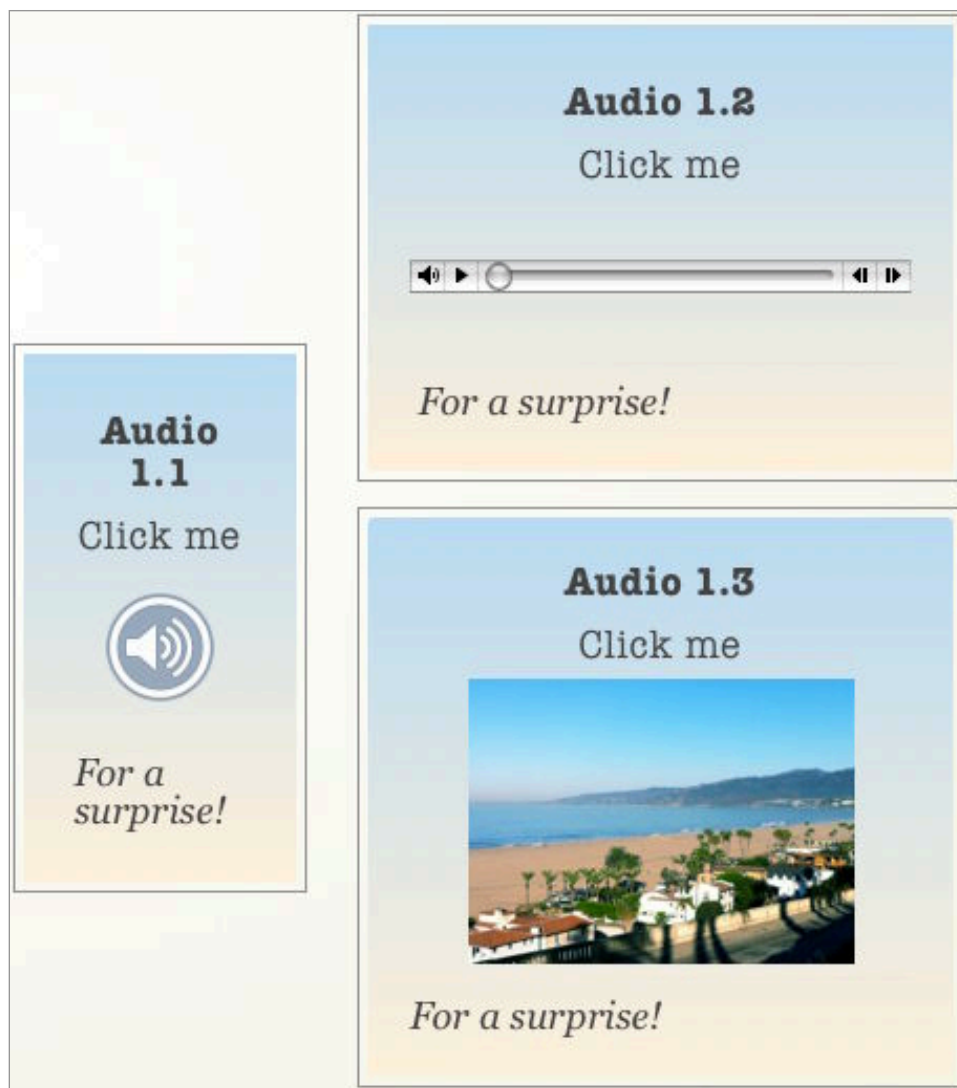


Figure 49: Media widgets with audio, showing the three ways that audio can be presented.

Note: The playback controls in Media widgets look somewhat different in the iBooks Author environment than they do on the iPad, which presents the standard iPad audio and video playback controls that users are accustomed to seeing.

Go light on the heavy media: *As compelling as video and audio can be, and although Media widgets make for great demos when you show your book, I suggest that you use video and audio sparingly. Media files, especially video files, can consume huge amounts of storage space and bloat your book. Remember that students will read your book on iPads that may not have more than 16 GB of storage. Don't overload the student's virtual backpack with an unnecessarily data-heavy book.*


Add Interactive Presentations

Way back in [Plan for Interactivity](#), I provided a tour of the widgets that iBooks Author offers. Then, in the preceding section, [Add Video and Audio](#), I described the Media widget. Here in this section, I describe how to set up the rest of iBooks Author's widgets—except for the Review widget, which I cover in [Add Study Questions \(and Answers\)](#).

Add Galleries

A page provides a constrained area within which to present your text and pictures. The Gallery widget offers a good solution when you need more than one or two pictures to accompany, illustrate, or amplify a point in your text: it can contain an arbitrary number of pictures and display them one at a time with just a tap or swipe.

To put a Gallery widget in your book, do this:

1. From the Widgets pop-up menu in the Toolbar, choose Gallery, or choose Insert > Widget > Gallery. An empty Gallery widget appears on the page.
2. From the Finder drag one or more image files, or even a folder of images, to the Gallery widget or to the Gallery Media field in the Widget Inspector's Interaction pane (**Figure 50**). If you prefer, you can, instead, click the Add  button below the Inspector's Gallery Media field and choose files from a dialog. Or you can drag images to the widget or to the Interaction pane from the Media Browser.

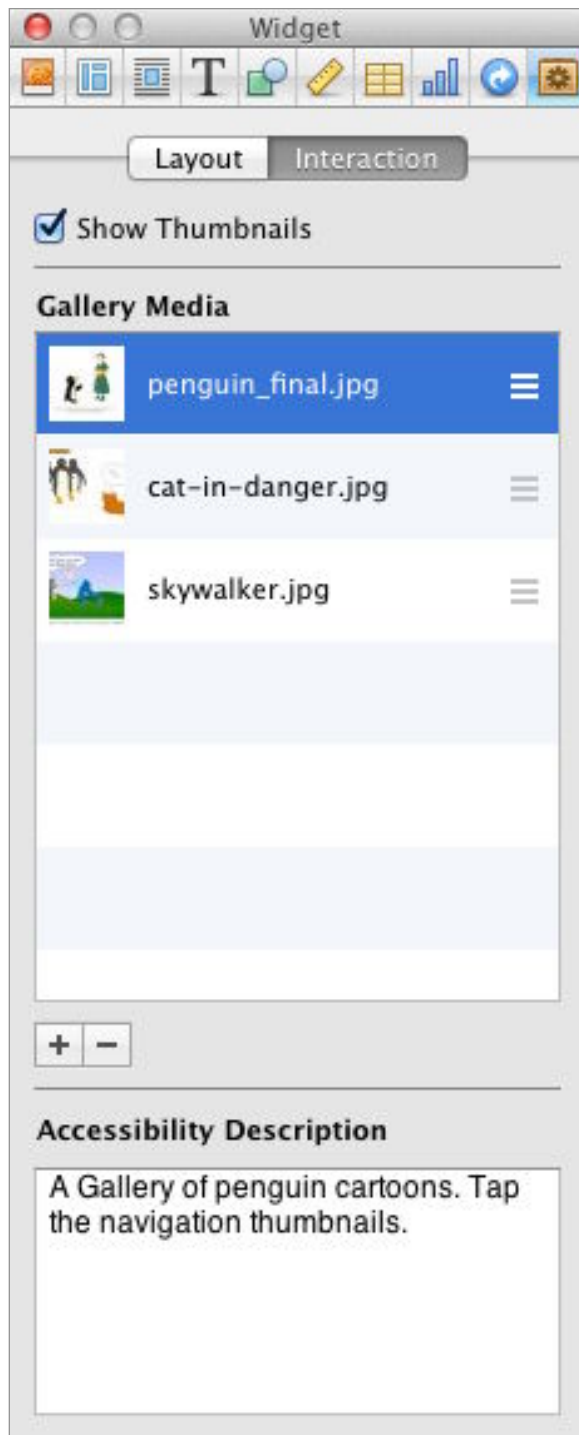


Figure 50: Use the Interaction pane to add, remove, arrange, and provide accessibility descriptions for images in a Gallery widget.

3. Use the controls in the Interaction pane to arrange the order of the images, to add or remove images, and to provide accessibility descriptions (see the earlier note, [Be Accessible](#)).

4. Choose whether the widget displays thumbnails to allow readers to choose a specific picture in the Gallery widget to view (**Figure 51**). Without thumbnails, readers swipe through the images to navigate.



Figure 51: Gallery widget showing thumbnails and a caption. Each image can have an individual caption.

5. On the Widget Inspector's Layout pane, choose whether the Gallery widget provides separate captions for individual images.
6. Customize the placement and appearance of the widget on the page using the techniques described in [Lay Them Out like Widgets](#).
7. If necessary, adjust the widget's anchor point (it is anchored by default) or make it float (see [Learn to Wrap](#)).

You can use a JPEG, GIF, or PNG image file in a Gallery widget. On an iPad with a Retina display, the widget can display images having no more than 2048 pixels along their longest sides, and will scale large ones down. On iPads with less commodious displays, pictures are

scaled to a longest side dimension of 1024 pixels. The maximum size for a Gallery image is 25 megapixels (5000 by 5000 pixels), and the maximum file size is 50 MB.

Tip: For better performance on all iPads, especially older ones, use images having no more than 1024 pixels along their longest sides.

Tip: Click each image in the widget and use the Edit Mask popover that appears to scale the image within the widget and adjust which part of it is visible.

Add Keynote Presentations

As I mentioned in [Plan for Interactivity](#), you can present Keynote presentations (and PowerPoint presentations that you have converted to Keynote) with the Keynote widget. Keynote presentations present narratives that comprise both pictures and text (usually in bullet-point form), and they are often useful for providing an animated and illustrated overview of a topic.

However, the Keynote widget in iBooks Author does not have all of the presentation capabilities of the Keynote application. In particular, it has these limits:

- Some slide transitions are not available.
- Self-playing presentations are not available.
- Voice-over narrations are not available.
- Presentations larger than 2048×1536 pixels on Retina-screen iPads or 1024×768 on other iPads are scaled down.

Note: iBooks Author requires Keynote version 5.2 or later, and can import only Keynote files that have been exported as HTML. If Keynote is installed on your Mac, you can choose Keynote files directly (they have `.key` filename extensions), and iBooks Author launches Keynote and silently exports the file into HTML form before importing it. Keynote is available from the Mac App Store.

Here's how to add a Keynote presentation to your book:

1. From the Widgets pop-up menu in the Toolbar, choose Keynote, or choose Insert > Widget > Keynote. An empty Keynote widget appears on the page.
2. Drag a Keynote file, or a folder containing a Keynote file that has been exported as HTML, onto the widget. Or, choose a Keynote file from a dialog by clicking the Choose button in the Widget Inspector's Interaction pane (**Figure 52**).

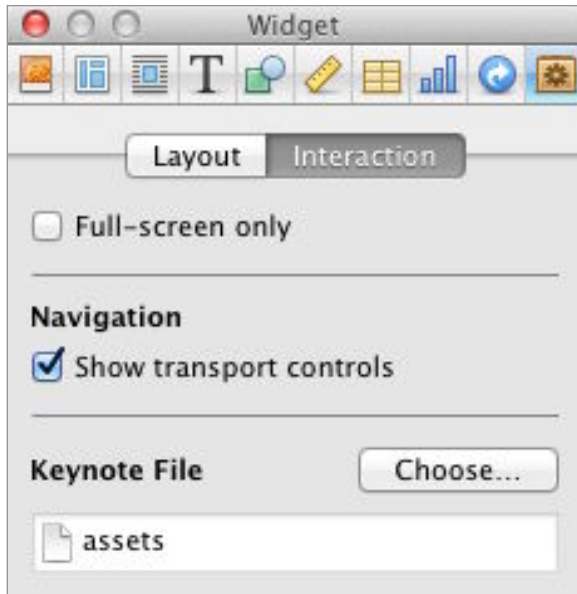


Figure 52: You can choose a Keynote file and display navigation controls within the Keynote widget using the Widget Inspector's Interaction pane.

3. Choose whether to display navigation controls in the widget (see **Figure 53**), and whether to restrict it to full-screen display only (I describe full-screen only display in [Add Video and Audio](#)).

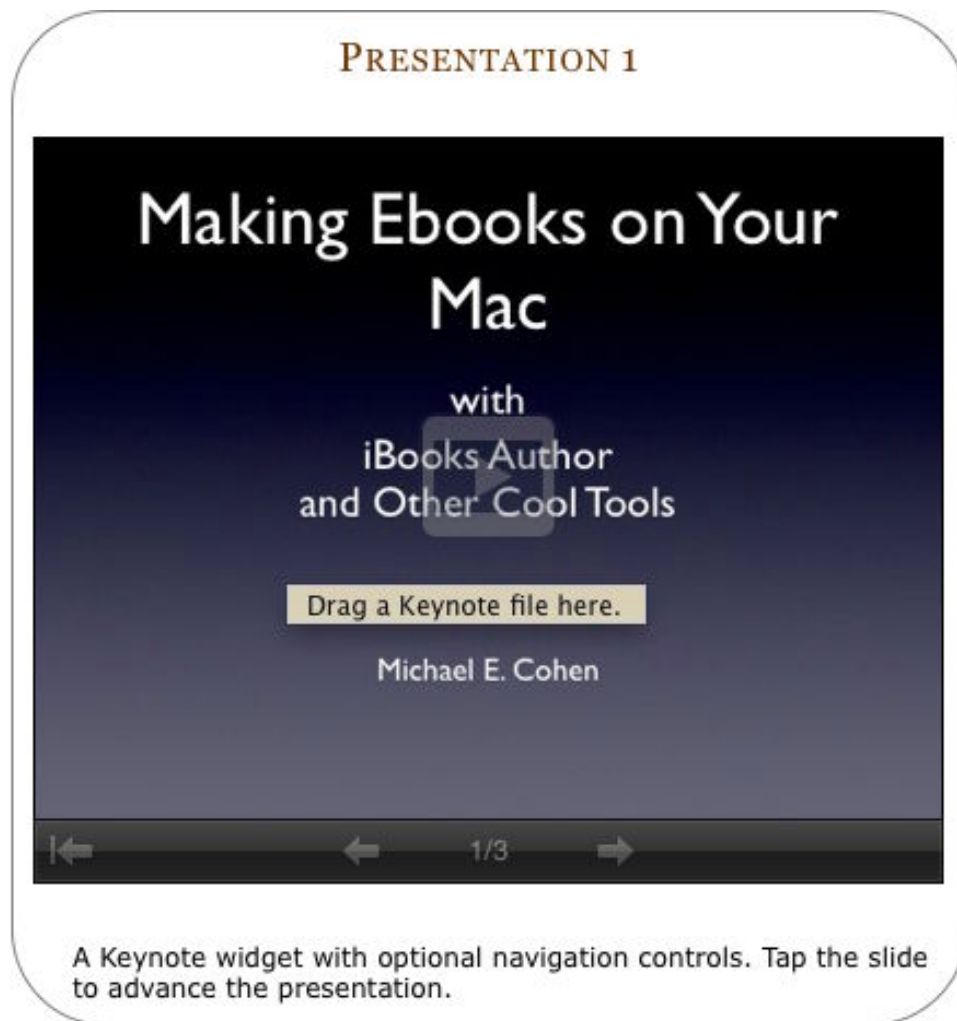


Figure 53: A Keynote widget with a label and a caption, and with transport controls that the reader can use to page through the presentation.

4. Using the techniques described in [Lay Them Out like Widgets](#), adjust the placement and appearance of the widget on the page.
5. Optionally, adjust the widget's anchor point or make it float (see [Learn to Wrap](#)).

Note: You can replace the Keynote file in the widget by dragging a different file to it; the Keynote file shown in iBooks Author behaves like a placeholder, as you can see in **Figure 53** (above).

But it doesn't work! Well, no and yes: a Keynote widget in iBooks Author on your Mac shows you only a static image of your presentation. Presentations do work in your book when you read it on the iPad, of course; otherwise, what would be the point of them?

Add Interactivity

Here's the difference between the Gallery widget that you've already seen ([Add Galleries](#)) and the Interactive Widget: galleries use one space to show multiple pictures, while Interactive Images use one space to show multiple *views* of a single picture. Use the Interactive Image widget to present labeled, detailed close-ups of different parts of a large picture. An Interactive Image has one or more labels that, when tapped, zoom the image in to show a more detailed view and, optionally, display a detailed description.

When your reader first opens a page with an Interactive Image widget, the widget presents its default appearance, which is normally the full image with its labels visible (although you can be perverse and hide some labels in the default view, I don't recommend it). **Figure 54** shows an Interactive Image widget with three labels.

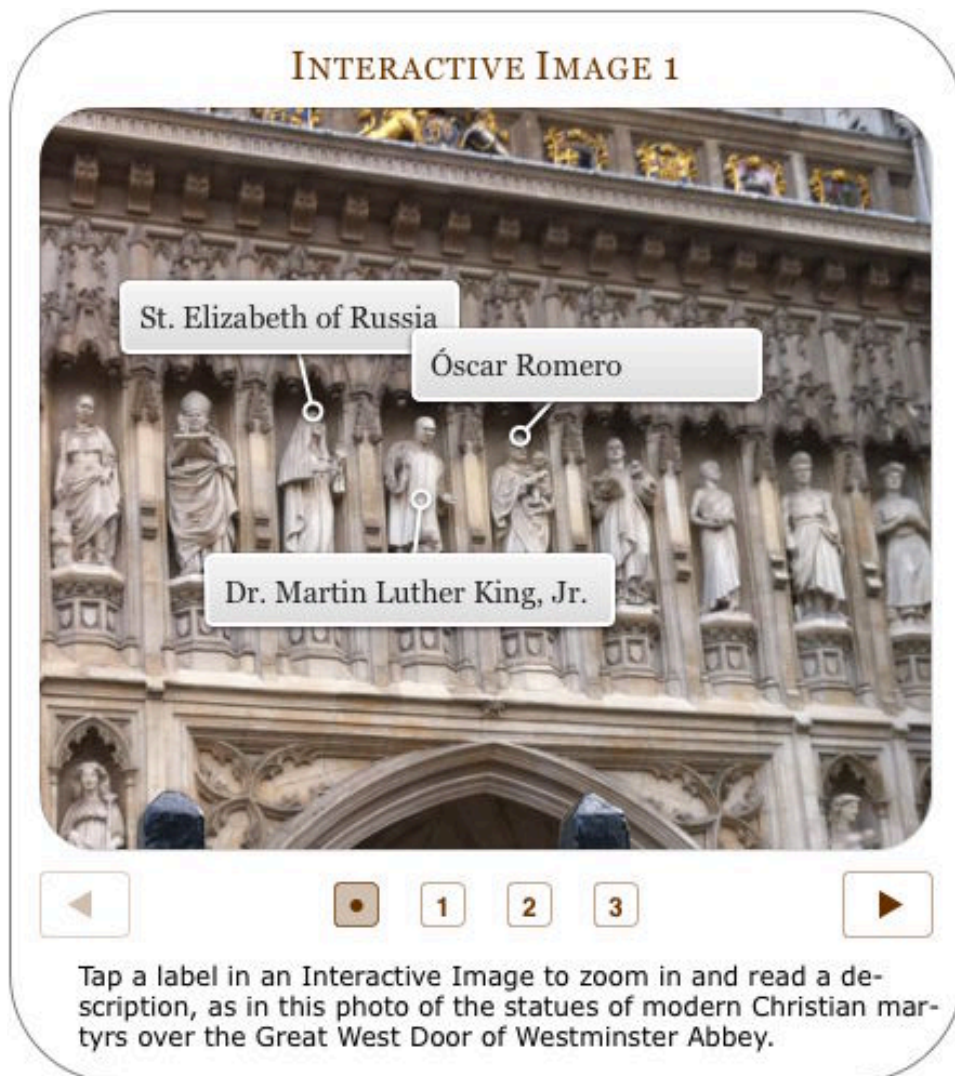


Figure 54: An Interactive Image with labels and transport controls.

Follow these steps to insert and configure an Interactive Image widget:

1. From the Widgets pop-up menu in the Toolbar, choose Interactive Image, or choose Insert > Widget > Interactive Image.

An empty widget appears on the page showing two placeholder interactive labels.

2. Drag an image to the widget from the Finder or Media browser.

Because Interactive Image widgets are meant to show large images, you can use an image on an iPad with a Retina display that has a dimension along its longest side of 4096 pixels; larger images are scaled down to 4096 pixels. Although you can use such images on an iPad with a lower-resolution display, images with a longest dimension of 2048 pixels provide improved performance.

3. Click a label.

The widget zooms in on the label and expands it to show a description (**Figure 55**).

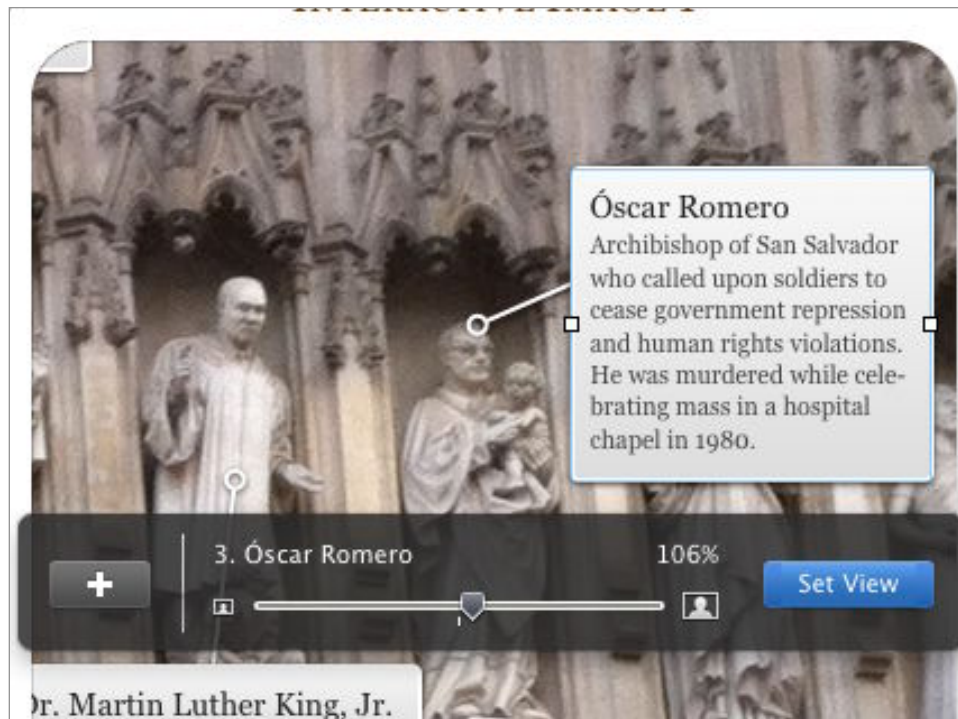



Figure 55: Adjusting a view's label position in an Interactive Image.

4. Connect the label to the part of the picture you want to label by dragging the endpoint of the line. If necessary, use the popover's slider to zoom out so you can see more of the picture, or to zoom in so that you can place the endpoint more precisely.
5. Position the label on the picture by dragging the line near where it enters the label.
6. Customize the label's name by clicking the text at the top of the label and then editing it.
7. Customize the label's description (or delete it)—click the text to activate it for editing.
8. Adjust the view of the image that will appear in iBooks when the label is tapped by moving the slider in the popover below the image and dragging the image in the frame. To finalize and record the view's magnification and position, click Set View.
9. Click Default View in the Widget Inspector's Interaction pane (**Figure 56**, ahead slightly) so you can see the full image, click another label, and repeat Steps 4–8.

Tip: You can also use the Inspector to show transport controls below the image, and to place the label's description in a sidebar that appears over the image instead of attached to the label itself.

10. If you need additional labels and views, in the Widget Inspector's Interaction pane, click the Add  button, set up the label and view using the steps above, and then, if desired, go back to the default view and add another view.
11. Once you've added all your views, I recommend that you provide accessibility descriptions in the Widget Inspector's Accessibility Description area for each view. Use the Inspector's pop-up menu to choose the accessibility descriptions for each part of a view: the view's label, the target that the label points to, and so on. The VoiceOver feature on the iPad reads these descriptions aloud to users. (Note that choosing Default View shows the accessibility description for the widget as a whole.)

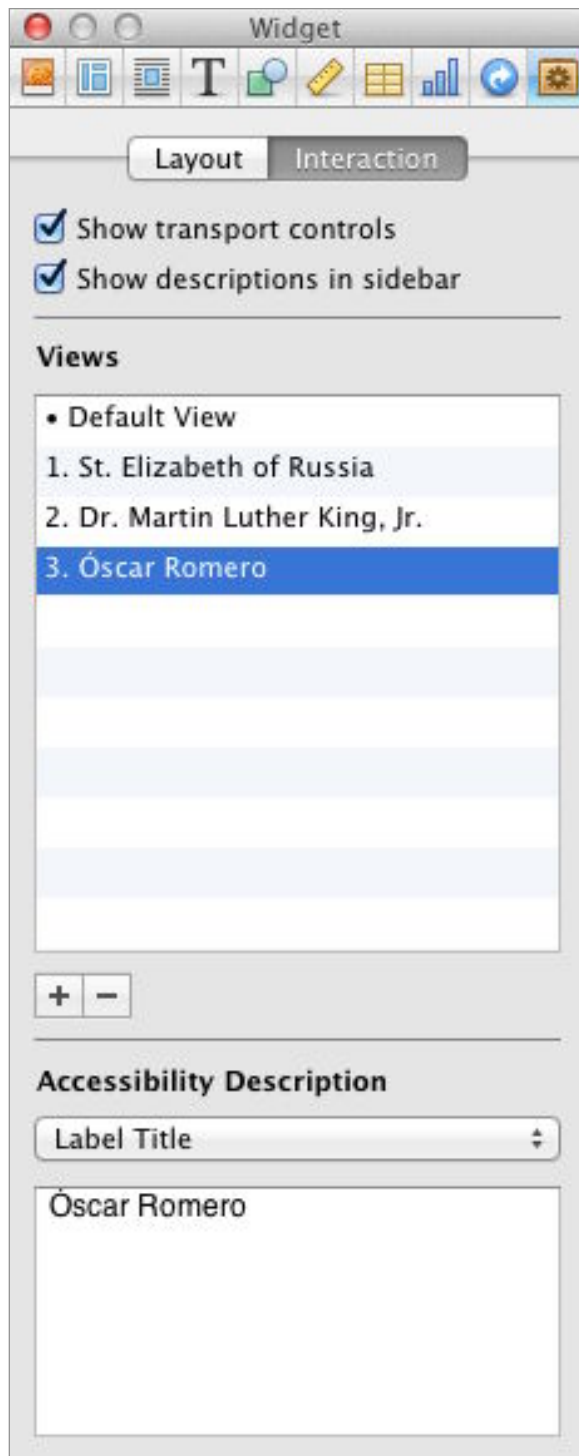


Figure 56: Set multiple accessibility descriptions, show optional controls, and rearrange the views with the Interaction pane.

Tip: In the Interaction pane of the Widget Inspector, you can drag any of the listed views (except the Default View) up or down to change the order in the list.

Add 3D Objects

You probably won't need the 3D widget for a literature textbook, but for many other kinds of textbooks—chemistry, engineering, biology, mathematics—displaying a three-dimensional object and allowing the reader to move it around is a wonderful capability.

iBooks Author's 3D widget can display any 3D model that uses the COLLADA format (file extension `.dae`). Unfortunately, you can't manipulate the object in iBooks Author; to take your model for a spin, you must preview or export your book and view it in iBooks on an iPad.

What's a COLLADA file? *If you don't know what a COLLADA file is, this widget may not be for you. If you do know, you probably know more about such files than I do. If you're curious about COLLADA, go to <http://en.wikipedia.org/wiki/COLLADA>. To create a 3D model, try Trimble SketchUp (<http://www.sketchup.com/>).*

Like the other widgets we've seen, getting the model into your book is a drag-and-drop operation:

1. From the Widgets pop-up menu in the Toolbar, choose 3D, or choose Insert > Widget > 3D. An empty widget appears on the page showing two placeholder labels.
2. Drag a `.dae` file to the widget from the Finder, or, in the Interaction pane of the Widget Inspector (**Figure 57**), click Choose and select a file from the dialog.

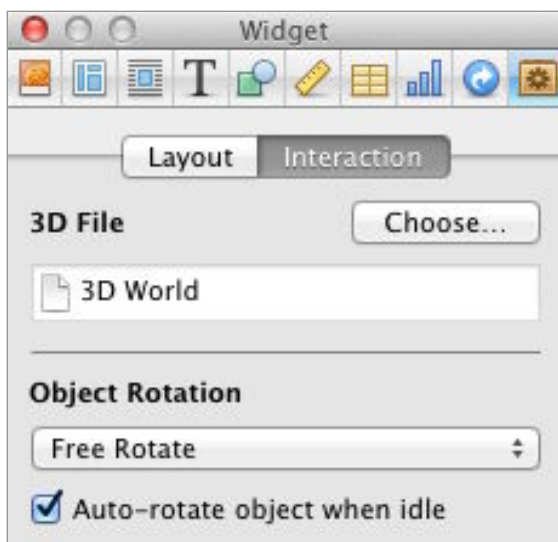


Figure 57: Adjust the rotation of a 3D object with the Widget Inspector's Interaction pane.

3. From Object Rotation pop-up menu, choose whether the object can rotate freely, only on the horizontal axis, or only on both axes.
4. Optionally, select whether the object automatically rotates when the reader comes to the page that has the widget.

Like any other widget, you can modify its frame, position, wrapping, anchor point, labels, and background using the techniques described in [Lay Them Out like Widgets](#) and [Learn to Wrap](#).

Your 3D image will initially appear in your published book laid out as you created it, but when a reader taps it in order to manipulate it, the image zooms to full-screen size, with its label and caption showing.

Add Scrolling Sidebars and Pop-Over

iBooks Author provides two widgets meant for textual digressions and supplements: the Scrolling Sidebar and the Pop-Over. These widgets can contain large quantities of formatted text, along with images, shapes, and additional text boxes—whatever you need, other than a widget, to make your point. You’ve read about what they are good for and seen examples, much earlier, in [Plan for Interactivity](#); now, here’s how to create them:

- **To add a Scrolling Sidebar:** Display the page to which you want to add the sidebar and then choose Insert > Widget > Scrolling Sidebar. The sidebar is placed as an anchored object on the page, with a background and text style suitable for the template you are using (**Figure 58**).

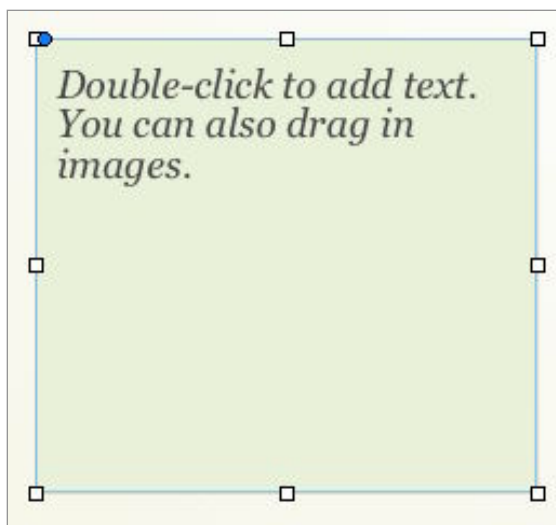


Figure 58: A new unpopulated Scrolling Sidebar, ready to be customized and filled with content.

- **To add a Pop-Over:** Display the page on which you want to put the image that triggers the Pop-Over and then choose Insert > Widget > Pop-Over. A placeholder for the image, along with the revealed Pop-Over, is placed as a floating object on the page (**Figure 59**). You can then drag an image onto the placeholder to serve as a trigger for the Pop-Over.

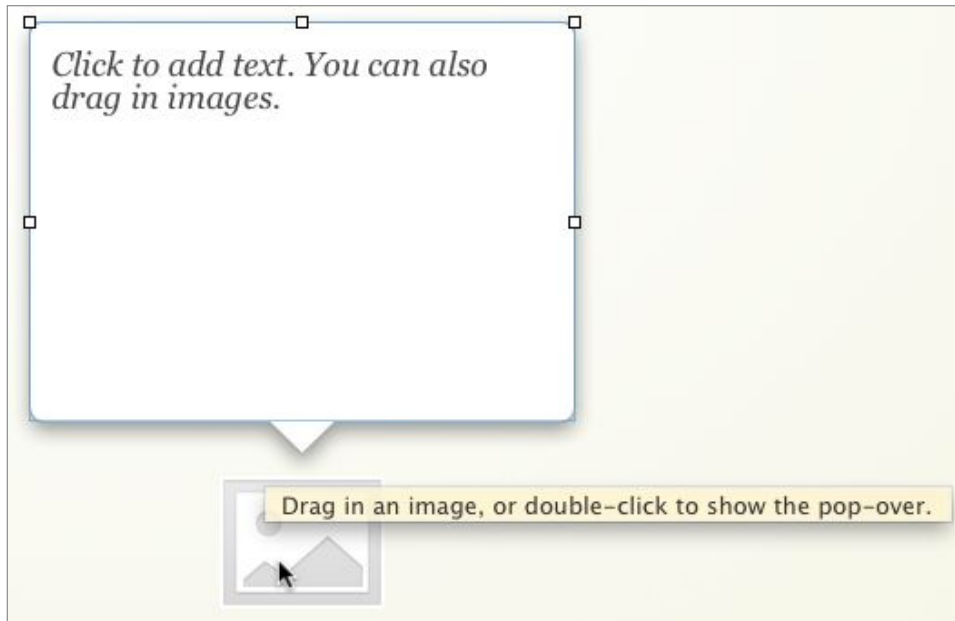


Figure 59: A new Pop-Over, ready for its picture and content.

Note: For a Landscape with Portrait book in its alternate portrait view, a Pop-Over does not appear when you double-click its trigger image in iBooks Author; the Pop-Over does appear as expected, however, when you view the alternate portrait view on an iPad.

Here are some of the ways you can customize these two widgets:

- **Add text and objects:** Type or paste text directly into the Scrolling Sidebar or Pop-Over; iBooks Author provides helpful placeholder text that tells you how you can get started. You can add text boxes and shapes to the contents of either widget by selecting it and then choosing the appropriate command from the Insert menu.
- **Add labels and captions:** By default, Scrolling Sidebars and Pop-Overs have no labels or captions, but you can add them with the Widget Inspector. Select the Scrolling Sidebar or the image that triggers the Pop-Over and use the controls in the Widget Inspector's Layout pane.

- **Change the text background and border:** You can change the color of the background behind the text and the border that surrounds it in a Scrolling Sidebar or Pop-Over. Select the Scrolling Sidebar, or double-click the Pop-Over's trigger image, and then use the Fill and Stroke controls in the Graphic Inspector. In addition, you can use the Graphic Inspector to add a shadow to a Scrolling Sidebar or to a Pop-Over's image trigger.
- **Adjust its size:** Drag the size handles around a Scrolling Sidebar or Pop-Over. A Scrolling Sidebar also offers a corner curve control (see [Lay Them Out like Widgets](#)) you can adjust to give it rounded corners.

Conserve space: *You can make the trigger image of a Pop-Over as big as you like (or, at least, as big as 5000×5000 pixels); however, remember that a Pop-Over's main benefit is to conserve space on the page for the book's main content by concealing a large digression "inside" of a small image.*

- **Adjust how text wraps around it:** Select a Scrolling Sidebar or a Pop-Over's image trigger and adjust how text wraps around it using the Wrap Inspector (see [Learn to Wrap](#)).

Tip: The image trigger for a Pop-Over is the one widget component that can be made inline. You can use this to create a small graphic object inline with your text that produces a Pop-Over when readers click it—perfect for annotations.

Add HTML

The HTML widget can provide forms of interactivity not anticipated by the iBooks Author developers. The name is a misnomer because it really displays Dashboard-type widgets, like the ones that appear on your Mac's Dashboard. Although Dashboard widgets contain HTML code, they also contain other kinds of code, and can contain and display images and even audio and video.

These Dashboard-type widgets (not to be confused with iBooks Author's own widgets) are often developed with Apple's free Xcode developer tool suite (<http://itunes.apple.com/us/app/xcode/id497799835>). Other applications, however, such as Tumult's Hype (<http://tumultco.com/hype/>) can also produce Dashboard-type

HTML widgets (I used Hype to create the Cheshire Cat widget that you'll see shortly).

Note: You can insert only widgets with HTML, CSS, or JavaScript code; for example, Dashboard widgets with Cocoa plug-ins or similar compiled code can't be added to an HTML widget. See the support document "iBooks Author: About HTML widget creation" (<http://support.apple.com/kb/HT5068>) for more about how to prepare HTML widgets and the restrictions on what they can contain.

Note: HTML widgets can contain and play `.mp4` video files and `.m4a` audio files only. Unlike the Media widget, which uses QuickTime to optimize audio and video for use in your book, the media inside of an HTML widget must already be in one of those two formats. In addition, DRM-protected media won't play in an HTML widget (well, what did you expect?).

If you have a widget handy that you want in your book, here's how to put it there:

1. From the Widgets pop-up menu in the Toolbar, choose HTML, or choose Insert > Widget > HTML. An empty widget appears on the page just waiting for your widget.
2. Drag the widget file (they have a `.wdgt` file extension) to the HTML widget from the Finder, or, in the Interaction pane of the Widget Inspector, click Choose and select a file from the dialog.

The widget appears in your book as a thumbnail: HTML widgets play only in full-screen when the reader taps them.

You can, however, select the widget in iBooks Author and click the Edit HTML button that appears. This puts the widget in full-page view in iBooks Author, where you can possibly try it out, but definitely adjust its label and caption (**Figure 60**). I say *possibly* because iBooks Author's Help says that not all compatible HTML widgets work in iBooks Author, even if they do work iBooks on an iPad. However, the widget I created (shown in **Figure 60**) does work in the Edit HTML view (that is, the Cheshire Cat fades out and back in when it is clicked).

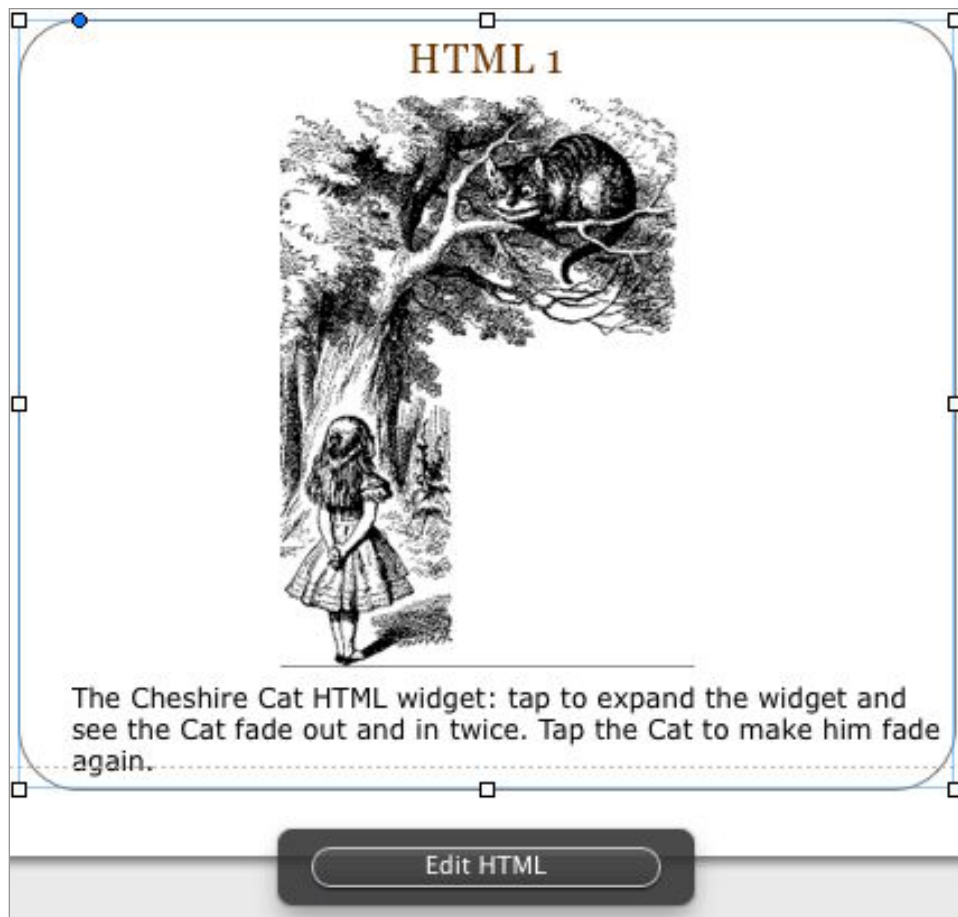


Figure 60: An HTML widget being edited.

Flip It for a Different View

When you make a book using a Landscape with Portrait template, the landscape view of your book provides more features and layout capabilities than its alternate portrait view. Nonetheless, if you allow readers to read your book in its alternate portrait view, you should take care that your book looks the way you want in that view.

Wait, what? Portrait view is optional? Yes, kids, it is. To restrict a Landscape with Portrait book to the landscape view only, go to the Document pane of the Document Inspector and check *Disable Portrait Orientation*. Now you don't have to mess with it at all. And, if you use a Portrait Only template, none of what I describe in this section pertains to that template. Nonetheless, you should still read this section, because you may change your mind for your next book, if not your current one.

First, consider what the alternate portrait view does to your content and think about why your readers might want to use that view. In alternate portrait view, the text of each chapter and section appears in its own single page: at the top is a title banner, which is followed by a scrollable page that accommodates the entire text flow of the chapter or section—rather like many common Web page designs. Any widgets or illustrations (other than inline objects) may appear as thumbnails in the margin beside the text.

As a result, the alternate portrait view presents text front and center, while it relegates any Scrolling Sidebars and attractively distracting illustrations, whether passive or interactive, to unobtrusive thumbnails until a reader's tap summons them. The alternate portrait view, therefore, helps readers focus on the main textual content of a book.

Generally, the alternate portrait view works best for books that rely primarily upon the main text flow and that contain relatively few figures and interactive illustrations. If you use too many illustrations and widgets, you'll end up with a pile-up in the thumbnail track, such as the one shown in **Figure 61**, which depicts the alternate portrait view of the Multi-Touch book companion to this book, *Take Control of Getting Ready for iBooks Author*, and which illustrates one of the reasons that I disabled the alternate portrait view in that book.

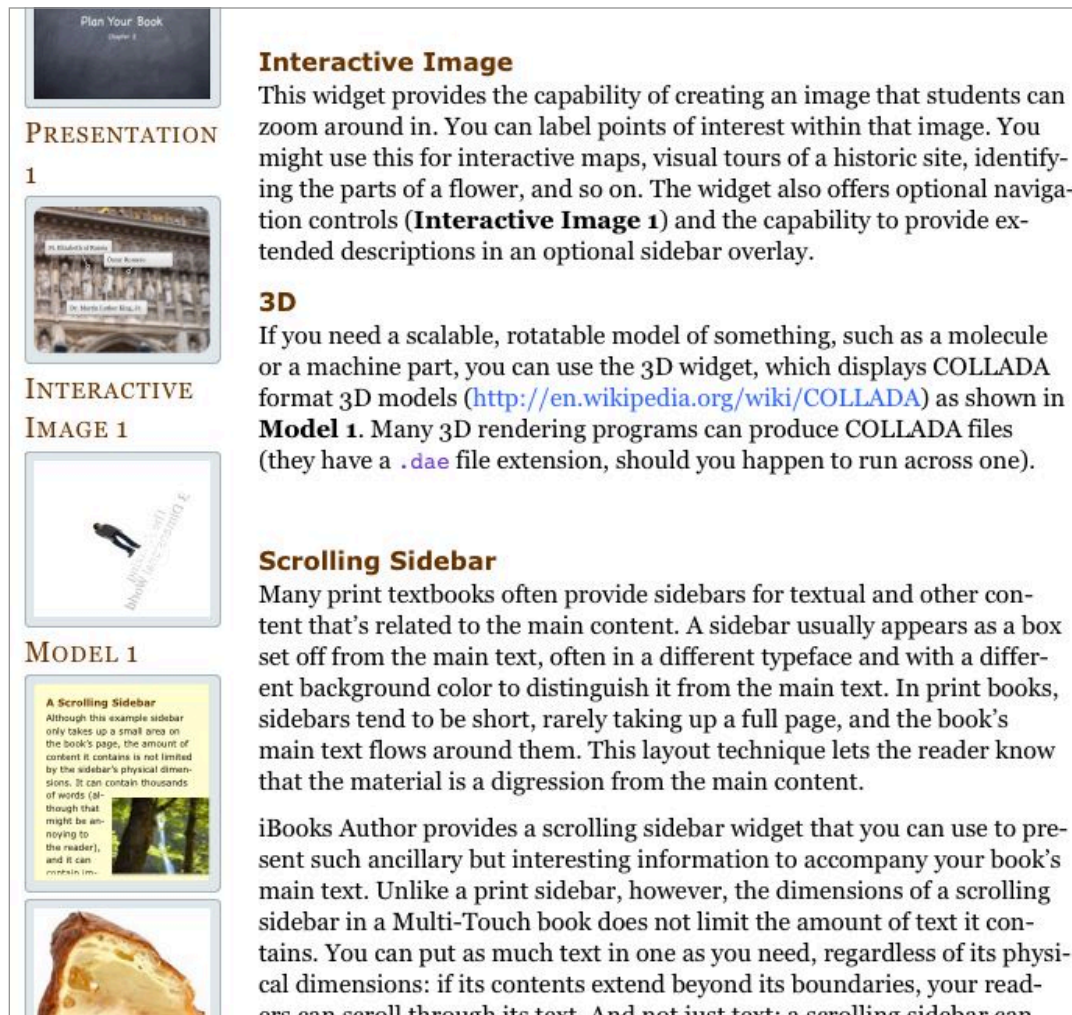


Figure 61: Thumbnails can pile up in a visual train wreck if you have too many in an alternate portrait view.

I've already discussed the mechanics of laying stuff out in the alternate portrait view as well as the main view, so here I briefly mention additional steps you should take for the alternate portrait view:

- **Check your anchors:** When you create figures and widgets, they normally start as anchored objects (see [Learn to Wrap](#)). In landscape view, you usually don't have to think much about where the anchor is located because it is placed, by definition, on the same page as the object it anchors—even if the anchor's initial position is far from the passage with which the object is associated (anchors often initially appear at the top-left of the current page, and they don't move when you move the objects they anchor elsewhere on that page).

The alternate portrait view, on the other hand, has only one page, and it displays objects only as thumbnails. When you view a section or chapter in that view, the thumbnails may show up farther from the text to which they belong than you'd like. Therefore, remember to drag your anchor to the right location in the text whenever you place an object on the page in landscape view, and then to check where the thumbnail shows up in the alternate view. You can slide thumbnails around to make fine adjustments, but you can't rearrange their order in the alternate view, so make sure the order of the anchors in the landscape view is, um, in order.

- **Check your tracks:** You can show or hide the thumbnail track with the Layout Inspector on a section by section basis, including in any chapter opening material that appears before the chapter's first section. I suggest you browse through your book in the alternate portrait view and decide on a section by section basis whether the thumbnail track needs to be visible. For example, if a section has no thumbnails, you can turn off the track and gain screen real-estate.
- **Check your sanity:** You can't assume that iBooks Author has done the right thing by your content in the alternate portrait view just because you've polished the landscape view to a fine gloss. Whenever you finish composing and laying out a section or chapter, give it a once-over in the alternate portrait view. This sanity-check pass through your content can occasionally alert you to easily fixable problems in the alternate view. It's also a good way to give your text a final proofreading pass without being distracted by your book's various figures and widgets.

Include Study Aids

Well, yes, your whole book is, or can be, a “study aid,” but here I want to discuss three sets of useful tools and techniques for advancing your pedagogical aims:

- The Review widget, and how you can use it to help readers review and think about the material they’ve read (just ahead)
- The Glossary tool, and how you can exploit it as both a teaching tool and a conceptual index to your book ([Create and Organize a Glossary](#))
- Bookmarks and hyperlinks, and how you can use them to [Cross Reference Your Book](#) and even access that big book we call the Internet

Pay attention; there may be a test.

Add Study Questions (and Answers)

A feature you’ll often find in textbooks are study questions, either sprinkled throughout the book or tucked away at the end of each chapter or section. iBooks Author provides the Review widget for you to use to make interactive versions of these time-honored textbook staples. With the widget, you not only can provide questions but the answers as well so readers can evaluate their mastery of the materials.

Unfortunately, until the gnomes and boffins in the vast research catacombs beneath Apple’s headquarters in Cupertino develop reliable artificial-intelligence-based text analysis algorithms that can run on a student’s iPad, you can forget about adding study questions to your book that parse essay questions or even short answer quizzes. But what you *can* provide are study questions of the multiple choice and matching variety. **Figure 62** shows a simple example of the match-the-label-with-the-image variety of study question.

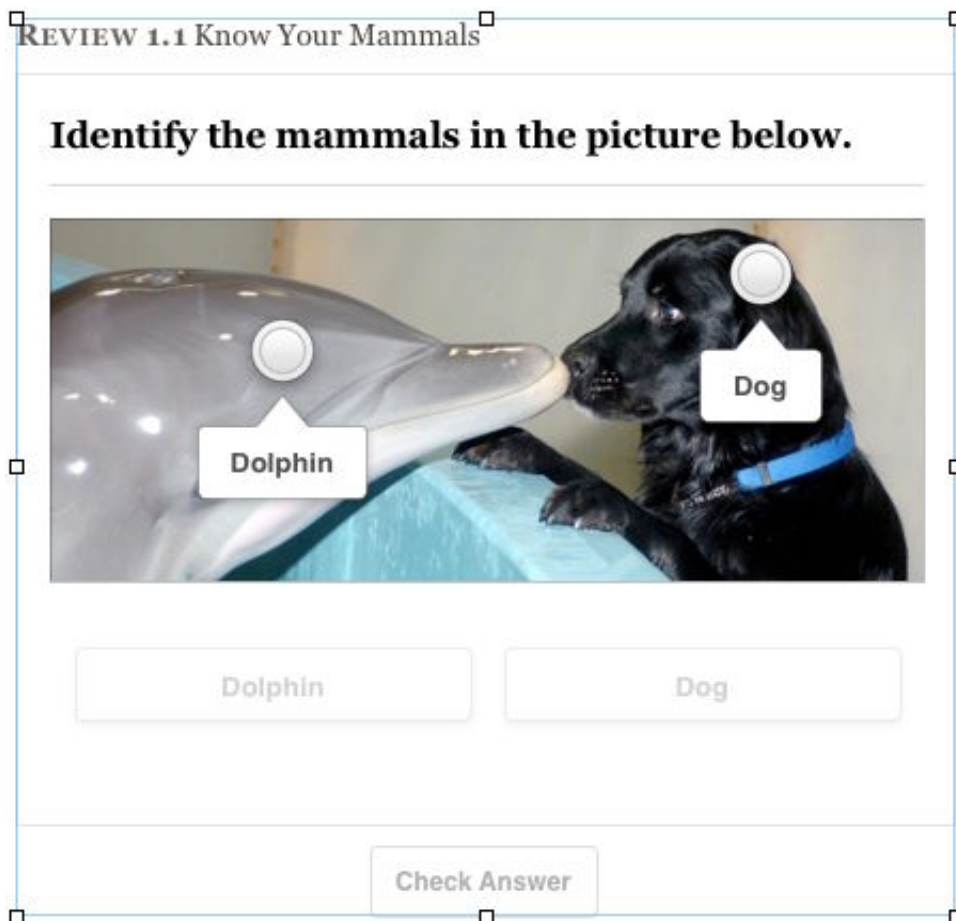


Figure 62: A rudimentary labeling question as it appears in iBooks Author with the answers in place; on the iPad the reader drags the labels from beneath the images to their correct positions and then taps Check Answer.

The Review widget can contain multiple questions and can mix types; for example, a simple multiple choice question can be followed by a matching question or a labeling question. You can arrange the order of the questions however you like. On the iPad, the widget allows the reader to navigate between questions, answer the questions, check the answers, and re-answer a question if the first answer was incorrect.

Don't be testy: The widget doesn't keep track of right answers, so it can't be used for graded quizzes. Design your questions, therefore, to help readers reinforce the information that they have read (and seen, and heard) in your textbook.

To add a Review widget, choose Review from the Toolbar's Widget pop-up menu, or choose Insert > Widget > Review. A Review widget appears on the current page as an anchored object (see [Learn to Wrap](#)) with a default four-item multiple choice question (**Figure 63**). The text of the question, its answers, and its label are all placeholder text that you can modify.

REVIEW 1.1 Lorem Ipsum dolor amet, consectetur

Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do tempor incididunt ut labore et dolore magna aliqua.

☒ **A. Answer 1**

☐ **B. Answer 2**

☐ **C. Answer 3**

☐ **D. Answer 4**

Check Answer

Figure 63: The default question in a newly placed Review widget.

You manage the order of the questions and the number of possible answers for each question with the Interaction pane of the Widget Inspector (**Figure 64**).

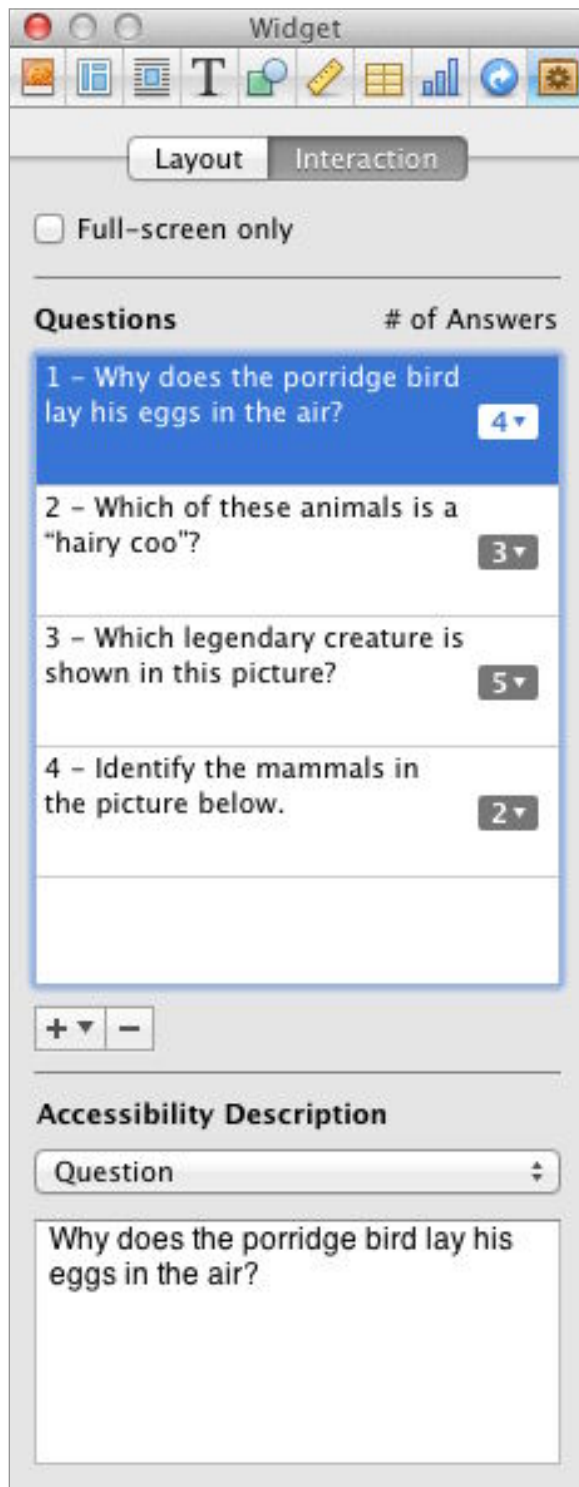





Figure 64: Create and arrange study questions, and provide accessibility descriptions, with our old friend, the Widget Inspector.

Here are the capabilities that the Interaction pane for the Review widget offers you:

- **Add questions:** Click the Add  button below the Questions list to see a pop-up menu of question types from which you can choose.
- **Remove questions:** Click a question, and then click the Remove  button below the question list.
- **Arrange questions:** Drag a question up or down in the Questions list.
- **Specify the number of answers to a question:** Click the number to the right of a question in the Questions list and choose the number of possible answers, from two to six.
- **Provide accessibility descriptions:** Use the pop-up menu in Accessibility Description area to select the different elements of each question (such as the question itself or the images that appear in a question), and use the field beneath the pop-up menu to provide a textual description for the selected question element.

And here are the types of questions you can add to a Review widget and how you set them up:

- **Multiple choice (four varieties):** The Add  button pop-up menu offers one text-only multiple-choice question, two multiple-choice questions that include an image placeholder (one above the list of possible answers and one beside the list), and one multiple-choice question where the reader must select from among multiple images. You set up the question by doing the following:
 - If the question includes images, drag images from the Finder or the Media browser to the image placeholders, and adjust each image's magnification and mask with the popover that appears beneath an image when you double-click it.
 - Select and type replacements for placeholder text.
 - Specify an answer by clicking the right answer's choice circle to place a green checkmark in it (refer back to [Figure 63](#)).

Tip: To specify more than one possible correct answer in a multiple choice review, hold down the Command key and click an answer.

- **Drag label to target:** This type of study question consists of an image and from two to six labels. When readers see the question, the labels initially appear beneath the image, and readers answer the question by dragging the labels to where they belong on the image. The image shows the possible label locations, and a location highlights when a label is dragged near it. You prepare the question like this:
 - Drag the image to the question's image placeholder and adjust it with the image editing popover (double-click the image to open the image editing popover).
 - Replace the placeholder text in the labels with your own text.
 - Specify the correct answer by dragging the labels to where they belong on the image.
- **Drag thumbnail to target:** This question type is much like the drag label to target question; however, here the labels are thumbnail images. When readers see the question, the thumbnails initially appear beneath the image, and they behave like the text labels in the add label question type when dragged.

To prepare the question, do this:

- Drag the main image to the question's image placeholder and adjust it with the image editing popover.
- Drag images into each of the thumbnails, and, again, adjust each with the popover.
- Specify the correct answer by dragging the thumbnails to where they go on the image.

Note: iBooks Author enables you to set up the questions, but to try them you must export or preview the book in iBooks on an iPad.

Create and Organize a Glossary

The Glossary tool that iBooks Author provides is a little hard to wrap one's neural wiring around, partly because the name is misleading. True, it can provide a glossary as the name promises, but it can also be used to build an index for a book, or to provide citations and annotations, or to spawn a chimerical (in the biological sense) index-*cum*-glossary beast that can carry footnotes on its back. To switch metaphors in mid-stream, it's a Swiss-Army glossary.

Note: In this section, when I use the term *glossary* (lowercase), I'm referring to the general idea of a list of terms and definitions; for example, *glossary term* means a term that appears in such a list. When I use *Glossary* (with an initial capital), I'm referring to the iBooks Author tool for creating, managing, and displaying glossary lists, terms, and definitions, and to the Glossary interface that the book's readers see.

Learn How the Glossary Works

To get a better handle on this tool, it helps to see how it works in iBooks from the reader's point of view. When a reader taps a glossary word that the author has marked as such in the text, a popover like the one shown in **Figure 65** appears.

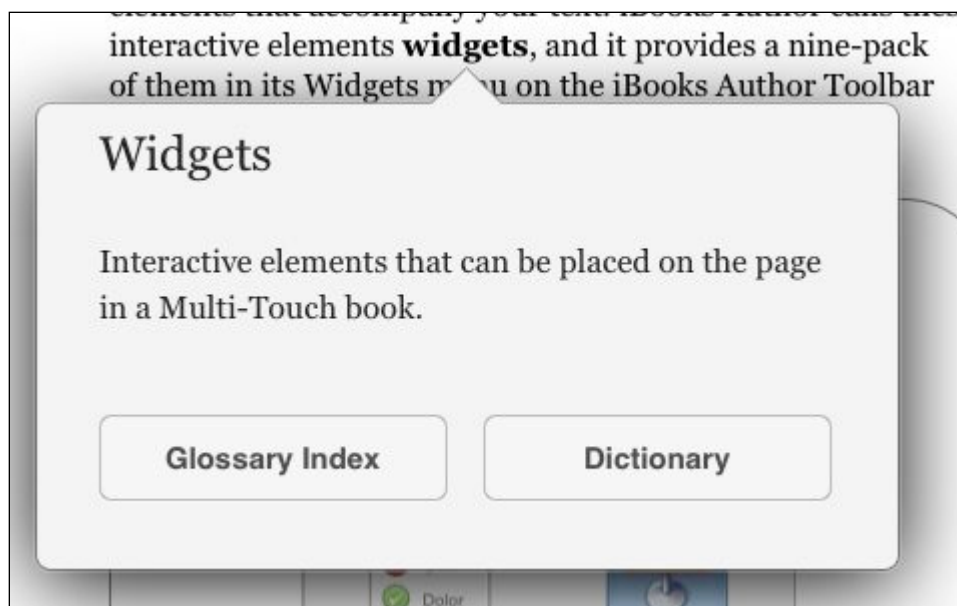


Figure 65: Tapping a glossary word in a Multi-Touch book on an iPad produces a popover that shows the term and its definition.

Tapping the Dictionary button in the popover shows the standard iBooks Dictionary popover, over which, as author, you have no control. A tap on the Glossary Index button, however, shows your book's complete list of glossary terms, with the tapped-on term selected in the list and its details displayed in a large pane to the right (**Figure 66**). Unlike iBooks' built-in Dictionary, you have complete control of the Glossary's contents.

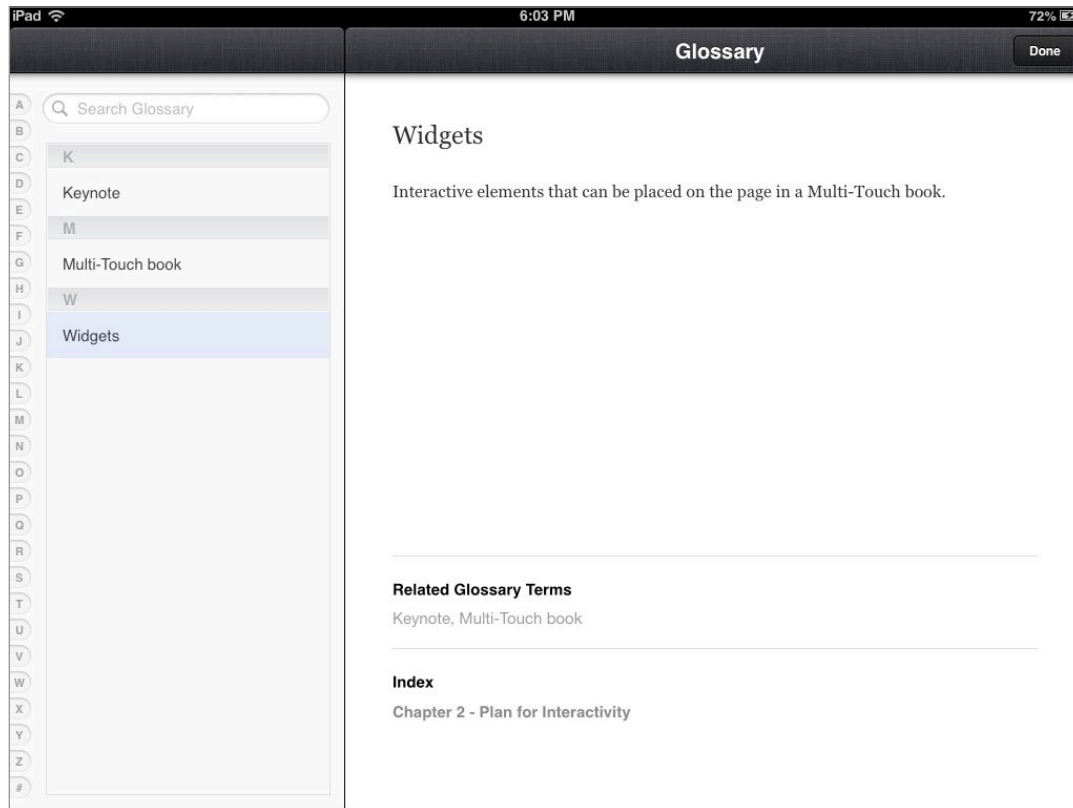


Figure 66: The full glossary entry, and a list of the other entries.

The glossary term's details include the following:

- **Term:** The glossary term itself (scholars often call this a *lemma*). You can edit this item in iBooks Author.
- **Definition:** The term's definition appears below the term in iBooks. In iBooks Author, you can replace the placeholder text with a definition of your own devising.
- **Related glossary terms:** This list is composed of other entries in the Glossary that are related to the displayed term. If a reader taps a related term, iBooks displays that term's details on the Glossary page. You can add and remove terms from this list in iBooks Author.

- **Index:** This list includes places in the book where, in most cases, the term occurs. A reader can tap an entry on this list to switch to that location in the book. However, it is quite possible to create an index link to a location where the term *doesn't* appear. This capability is often used for conceptual index terms (e.g., the term *Cell Division* might link to a page where *mitosis* is described, but where the actual words *cell division* do not appear).

The Primary Definition and the Index

You can specify that one of the items in a Glossary page's list of Index locations is the *Primary Definition*. For example, in a book about movie composers, you may have index links to five occurrences of the name *Bernard Hermann*; you can then specify the Primary Definition to be the link to the place in your text where you discuss his film composing career (as opposed to mentions of him in relation to other film composers).

A term in a book's Glossary doesn't need to have a Primary Definition in its Index list; that's up to you to decide on a per-term basis. In fact, a Glossary term does not need to link back to the book's text at all. If you want to fill your Glossary with terms and definitions and never link back to the text from any of them (that is, use your book's Glossary as a simple, specialized dictionary), you can.

Primary Definition links appear to the reader in bold type in the Index list.

Add Terms to the Glossary

iBooks Author provides several ways to add a term to the Glossary, but adding it from a selection is the most flexible method:

- **Add it from a text selection:** Select a word (or multiple contiguous words) in the text, and then, on the Glossary Toolbar (**Figure 67**), click Add Term. (The Glossary Toolbar appears below the Format bar; choose View > Show Glossary Toolbar [Shift-Command-E] if it isn't present.)

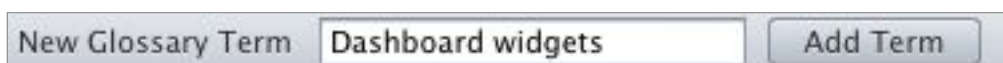



Figure 67: The left-hand side of the Glossary Toolbar, where you can add terms.

The selected text is bolded and the location is marked in the Glossary as the Primary Definition in the Index (see the sidebar just above, [The Primary Definition and the Index](#)). Adding a term from a text selection makes the selected text active: when the reader taps this text in your book, it displays the definition of the term in the Glossary popover. You can remove the bold formatting manually or change the formatting in other ways—for example, you might want to change the color or typeface.

Tip: To modify how iBooks Author styles terms you add from text selections, change the definition of the character style *Glossary Primary Definition*. See the topic Use Styles (under Add and Format Text) in iBooks Author’s Help for information about modifying styles.

After adding the term, you can edit the definition. To do so, click the term. Alternatively, click Glossary in the iBooks Author sidebar or click the Open Glossary  button at the right end of the Glossary Toolbar. The Glossary editor opens with your new term selected (**Figure 68**). Edit the placeholder text for the new term to provide the correct definition.

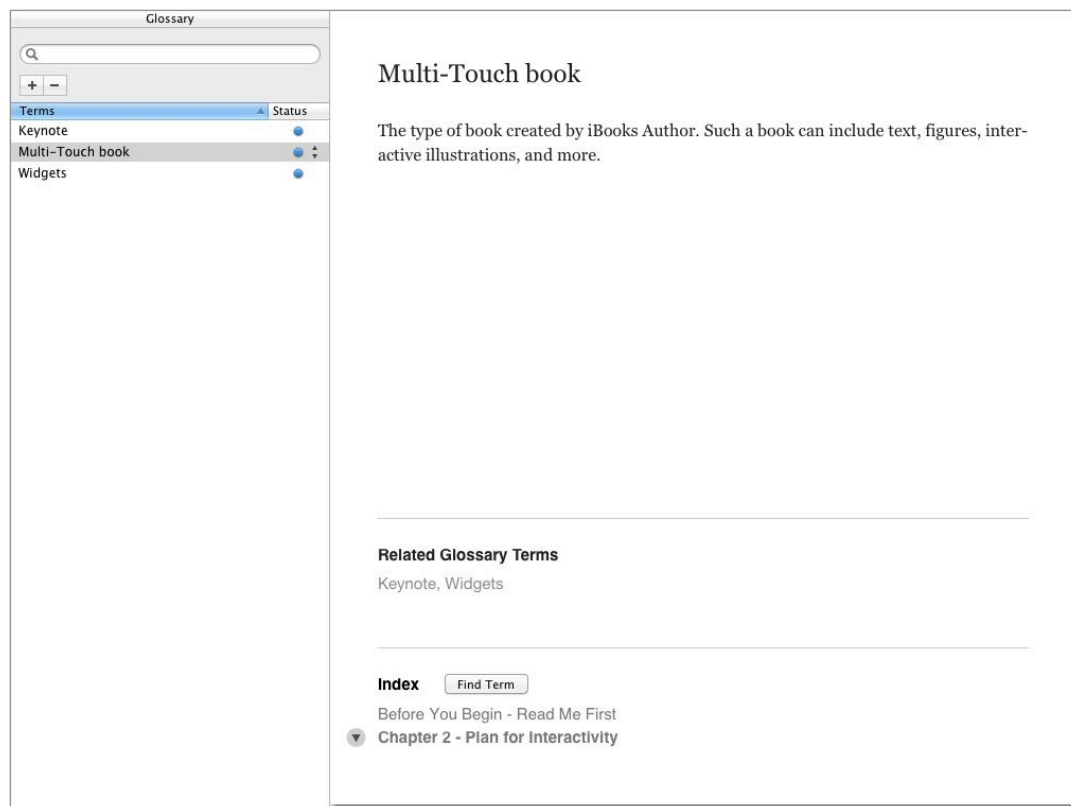



Figure 68: The Glossary editor in iBooks Author.

- **Type it in the Toolbar:** When you are not viewing the Glossary, you can type a term directly in the New Glossary Term field in the Glossary Toolbar, and then click Add Term. The word is added to the Glossary, but no Index link is created. You may wish to use this method if you are simply using the Glossary as a dictionary of terms and definitions without links.
- **Add it directly in the Glossary:** In the Glossary editor, click the Add  button above the term list on the left. A new untitled term appears, which you can edit. Use this method when you are building a simple dictionary or you need to add a conceptual term that doesn't appear in the text.

In the Glossary editor you can edit the spelling of terms, compose definitions, search the current list of terms, add or modify each term's Index list (those places in the text the term links to), and build each term's list of related terms.

And speaking of the Index list...

Create Indexes

Your book's readers can click an entry on a term's Index list in the Glossary to go to where that entry is linked in the book's text. You've already seen in the immediately preceding section how selecting text in your book and clicking Add Term creates a Primary Definition link in the Glossary, but how do you add subsequent occurrences of a term in your book to the term's Index list in the Glossary?

Here's how to link subsequent occurrences:

1. Do one of the following:
 - In the Glossary entry for the term, at the top of the Index list, click the Find Term button (shown near the bottom in **Figure 68**, slightly earlier). A Find & Replace dialog appears.
 - On any page in the book, choose Edit > Find > Find (Command-F), and then type the term in the Find field of the Find & Replace dialog that appears. Click Next in the Find & Replace dialog.

In either case, iBooks Author selects and displays the next occurrence of the term that it finds. If you start from the Glossary editor, that's usually the first occurrence in the book.

2. When iBooks Author finds an instance of the term that you'd like to include in the index, on the right side of the Glossary Toolbar, from the Index Link For pop-up menu, choose the term you want to link the selected text with, and then click Add Link (**Figure 69**). iBooks Author applies the Glossary Secondary Definition character style to the selected text, and the text is hot-linked to the chosen term in the Glossary.



Figure 69: Add an Index Link from selected text with this right-hand portion of the Glossary Toolbar.

3. Continue clicking Next in the Find & Replace dialog and optionally clicking Add Link in the toolbar until you've found all instances of the term in the entire manuscript.

Tip: Just as you can change the way iBooks Author formats Primary Definition links in your book by redefining the Glossary Primary Definition style, you can redefine the Glossary Secondary Definition style that is applied to the links you create with the Index Link For pop-up menu.

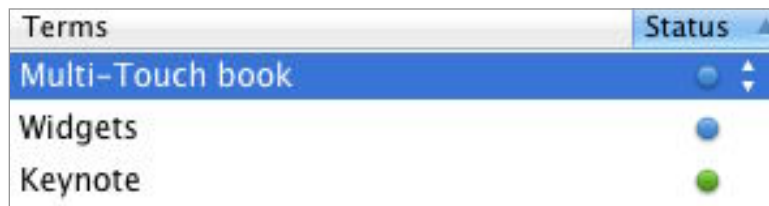
Note: All Index Links are two-way and one-to-one—the text on the book page links to one, and only one, Glossary entry, and the link back to it from the Glossary appears once, and only once, in the Glossary entry's Index list. This means that only one Glossary entry can link to any specific piece of text in your book.

You can use the Index Link For menu to link any selected text in your book to a term in the Glossary. For example, one could link the word *presentation* in the text of a book to the Glossary term *Keynote*. Using the Index Link For pop-up menu in this way is how you can link a passage of text to a conceptual term that you have manually added to the Glossary: just select a small portion of the text that discusses the concept and link it to the term using the Index List For pop-up menu.

Tip: When selecting text to link to a conceptual term in an index, select only a small portion, such as the first word, rather than the whole passage. If you select the entire passage, you won't be able to create any other links to the Glossary from within the passage.

Similarly, you can use the Index List For pop-up menu to link to notes in the Glossary. For example, suppose your history textbook contains the phrase, *Ich bin ein Berliner*. You can create a Glossary entry with the term *26 June 1963* and write a definition that describes President Kennedy’s speech on that date and the jelly doughnut misconception surrounding it (see http://en.wikipedia.org/wiki/Ich_bin_ein_Berliner#Jelly_doughnut_misconception). You can then link the German phrase to that entry, and, voilà, instant footnote.

As the list of terms you add to the Glossary grows, and especially if you use the Glossary for definitions, annotations, and indexes, keeping track of which terms are used for what purpose can become a problem. However, you can use the Status column in the Glossary’s Terms list to alleviate the problem (**Figure 70**). Click the Status column heading in the Terms list to group terms sharing the same Status color.



Terms	Status
Multi-Touch book	Blue circle
Widgets	Blue circle
Keynote	Green circle

Figure 70: Use the Status column in the Glossary’s Terms list to categorize your terms.

The good news is that it’s easy to apply a Status color to a term: hover over a term’s Status indicator to see the Status pop-up ↕ arrows and then choose a Status color from the menu. The bad news is that you can choose from only three colors: green, orange, or the default blue. (Hmm... glosses, notes, and index entries: three typical Glossary uses, three colors. Why, it’s almost as though Apple *planned* it this way.)

Hovering is also how you see a pop-up menu ▼ indicator for entries in a term’s Index list—this list is found at the bottom of the right side of the Glossary editor. Use that menu to manage entries in the Index list, and to navigate to the linked term in the book (**Figure 71**).

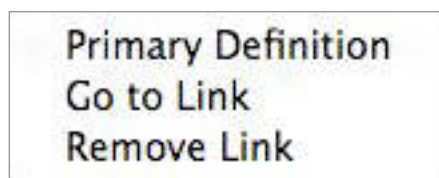


Figure 71: Make an Index link the Primary Definition, remove it, or jump to the linked text in the book with the Index list pop-up menu.

Relate Glossary Terms to One Another

The Related Glossary Terms list is where you associate one term with another in the Glossary: in iBooks, the reader taps a term in the list to jump to the entry for that term. In iBooks Author, this list appears in the Glossary editor beneath a term's definition.

You have two ways to relate terms in iBooks Author:

- **One-way relationship:** Drag a term from the Terms list to the Related Glossary Terms heading. This places the dragged term in the Related Glossary Terms list for the currently displayed term, creating a one-way relationship.
- **Two-way relationship:** Drag one term over another within the Terms list. This places the dragged term on the target term's Related Glossary Terms list, and it also places the target term on the dragged term's list, creating a two-way relationship.

Removing a term is even easier: just drag the term from the Related Glossary Terms list until you see a puff of smoke beneath your pointer, then release (**Figure 72**). Keep in mind that removing the term at either end of a two-way relationship removes both ends.

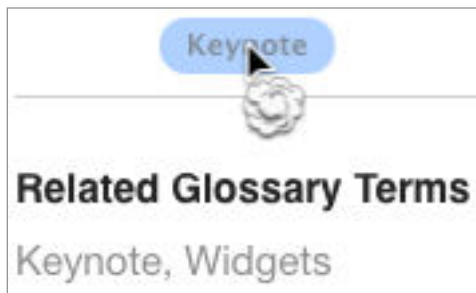


Figure 72: Boom! goes the related term.

Cross Reference Your Book

Often one part of a book will refer to another part. Such cross-references in the print world usually consist of text like *see page 47*. However, in the digital world, including in this book, cross-references can be interactive: they can be a word or phrase that the reader taps to go to a destination elsewhere in the book. Or even out of the book.

That's how this book works, too! Tap (or click) any of the blue text in this ebook to go to where it links to. (I describe this feature in the first bullet item under [Basics](#), much earlier.)

Link within Your Book

iBooks Author offers linking capabilities by way of a Link Inspector (**Figure 73**). In iBooks Author, the cross-references to other places within your book are hyperlinks, and their destinations are bookmarks.

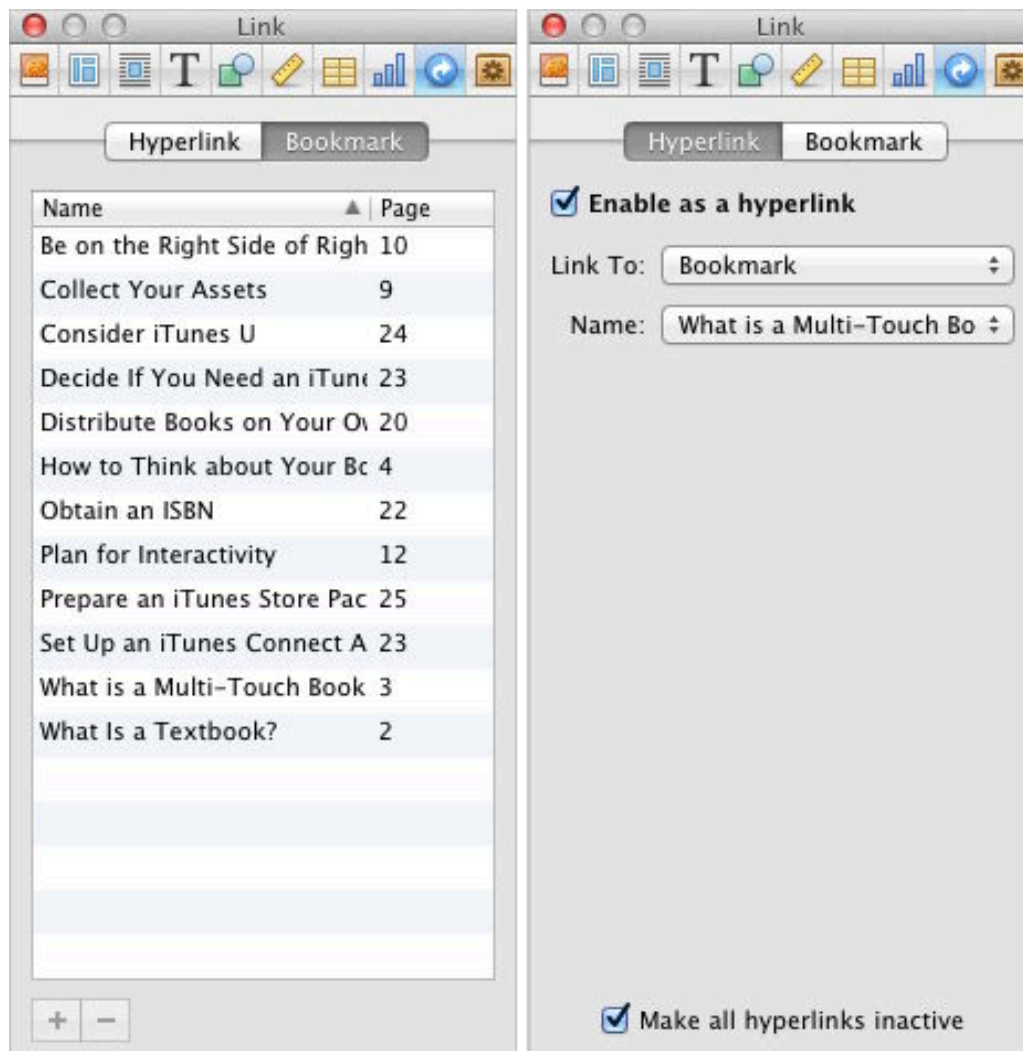



Figure 73: The Link Inspector's two faces: Bookmark pane (left) where you first set up a link's destination, and the Hyperlink pane (right) where you make a hyperlink to the destination.

Before you can create a cross-reference hyperlink that's of any use, you must create a bookmark to serve as the hyperlink's destination. The Link Inspector makes that easy: select the text you want for your destination, and click the Add  button in the Link Inspector's

Bookmark pane (or choose Insert > Bookmark). The bookmark appears in the Bookmark pane's list, with a name that matches the selected text.

You can rename the bookmark by double-clicking it and typing a new name. Changing the name does not affect the text at the bookmark's location.

Making a hyperlink is just as easy:

1. Select the text you want to serve as the hyperlink.
2. In the Hyperlink pane of the Link Inspector, click Enable as a Hyperlink, and then, from the Link To pop-up menu, choose Bookmark (or choose Insert > Hyperlink > Bookmark).
3. From the Name pop-up menu, choose the name of the bookmark that you want to make the hyperlink's destination.

When text is made into a hyperlink, iBooks Author applies the Hyperlink character style to it; you can change that style's definition if you want.

iBooks Author also makes linking to a figure or widget a snap, since all figures and widgets, when created, are automatically made into bookmarks:

1. Position your cursor anywhere in the text without making a selection, and then, in the Hyperlink pane of the Link Inspector, click Enable as a Hyperlink. When you don't have any text selected and click that checkbox to select it, the Hyperlink pane looks like **Figure 74**, and iBooks Author inserts an automatic text figure reference at the cursor position.

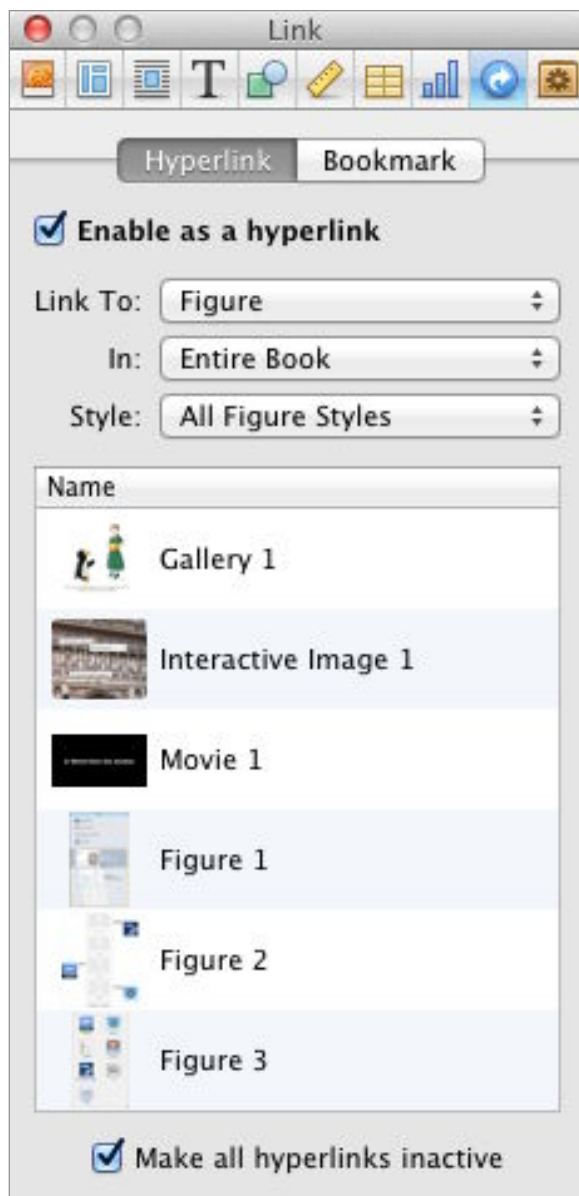


Figure 74: Linking to a figure or widget.

2. In the list of figures, click the one that you want to serve as the hyperlink's destination.

Narrow the number of figures listed: To restrict the list to figures in a specific part of the book, choose an item from the *In* pop-up menu. To restrict the list to specific types of widgets or illustrations, choose an option from the *Style* pop-up menu.

The automatic figure reference is linked.

Cross-references don't just have to occur in the body text. You can make almost any text into a hyperlink (except text that already is linked as a hyperlink or a glossary index link). For example, consider

the objectives placeholder that often appears in section opening layouts (see [Change a Section Layout](#)). You can link each objective you put in that placeholder to a bookmark in the section, making the objectives list a sort of mini-Table of Contents.

You can also use bookmarks and hyperlinks to make on-page endnotes for a section instead of using the Glossary as an annotation tool (see [Create Indexes](#)): type the note markers in your main text, and then make them into hyperlinks, assigning their destinations to the notes you have put (and bookmarked) at the end of the section.

Link to Other Destinations

In addition to figures and bookmarks, you can also make hyperlinks that take the reader out of the book: you can cross-reference the Internet from your book.

Do you want to link to a Web page? Choose Webpage from the Link To pop-up menu in the Link Inspector's Hyperlink pane, and type (or paste) a URL in the URL field that appears. The hyperlink you just created, when tapped in the book, opens the iPad's Safari browser to the URL you specified.

You can link to an email address by choosing Email Message from the Link To pop-up menu, and then supplying an address and subject in the fields that appear. When the reader taps the link, a pre-addressed message is created that the reader can compose and send from within the book. The email capability can be used in commercial textbooks, for example, to allow readers to send feedback to the publisher, or in self-published textbooks for students to send email to the author.

Think of the children: Consider whether adding Web or email links is appropriate for your book's target audience. In many cases, it's not a good idea: do you want to let a bunch of third-graders loose on the Web?

Surprise! The test is a lie. There is no test, even though I promised one at the beginning of this chapter. But aren't you glad you studied?

Publish Your Book

Ecclesiastes may be overstating things with the claim that, “Of the making of many books there is no end,” but it’s true that you’re not done when you have finished writing your book and adding all of its assets and study aids. There’s still the small matter of getting it to its adoring public—or to those students with their iPads and shining morning faces, creeping like snails unwillingly to school.

The good news and the bad news is the same news: Apple makes your publication choices easy. If you want to sell Multi-Touch books made with iBooks Author, you can do so only through Apple’s iBookstore. You can give them away through other channels, but only Apple can sell them.

In this chapter I first offer important tips about how to [Proof and Fine-Tune](#) your book and show you how to [Preview Your Book](#) on an iPad. Next I cover how to [Make Advance Reading Copies](#) so you can obtain useful feedback from trusted associates.

As you polish your book to a gemlike gleam, it’s time to get serious about the business of publishing—if you haven’t done so already: I tell you how to [Obtain an ISBN](#), a unique number used to identify a published book; help you [Decide If You Need an iTunes Connect Account](#), your gateway to Apple’s iBookstore; and ask you to [Consider iTunes U](#), Apple’s free online course materials service for educational institutions.

And, finally, I guide you through the last step, in which you [Prepare an iTunes Store Package](#) and get ready to launch your creation to the delight and astonishment of the book-reading world.

Fame and fortune awaits.

Proof and Fine-Tune

When the last word goes in, the last widget gets nailed down, the last cross-reference is linked, and the last glossary term is indexed, it sure feels like you’re done.

But you’re not. As countless writers, editors, publishers, and readers have empirically demonstrated over the centuries, there’s always one

more typo. And not just typos: in even the best constructed drafts (and at this point, you've not finished a book, you've finished a draft of a book), there can be other sins of omission and commission that you may be unable to spot because you're too close to the material, having spent weeks or months composing it.

With the bulk of the work behind you, I recommend you do these three things to apply the final polish before publication:

- Fine-Tune the Table of Contents (discussed next).
- [Preview Your Book](#) and do a sanity check.
- [Make Advance Reading Copies](#) in order to beta-test the book with a small group of readers.

Let's take a closer look at each of these.

Fine-Tune the Table of Contents

Way back in [Plan Your Book](#), I talked about why you should keep your book outline shallow. One reason was that iBooks Author includes only the titles of chapters and sections in the Table of Contents.

Well, that is true except for one special case: you can go deeper than two levels in the alternate portrait view Table of Contents for a Landscape with Portrait book. Look at the TOC pane of the Document Inspector (**Figure 75**), and you'll see a list of paragraph styles—paragraphs formatted with those styles are included in the alternate portrait view's Table of Contents.

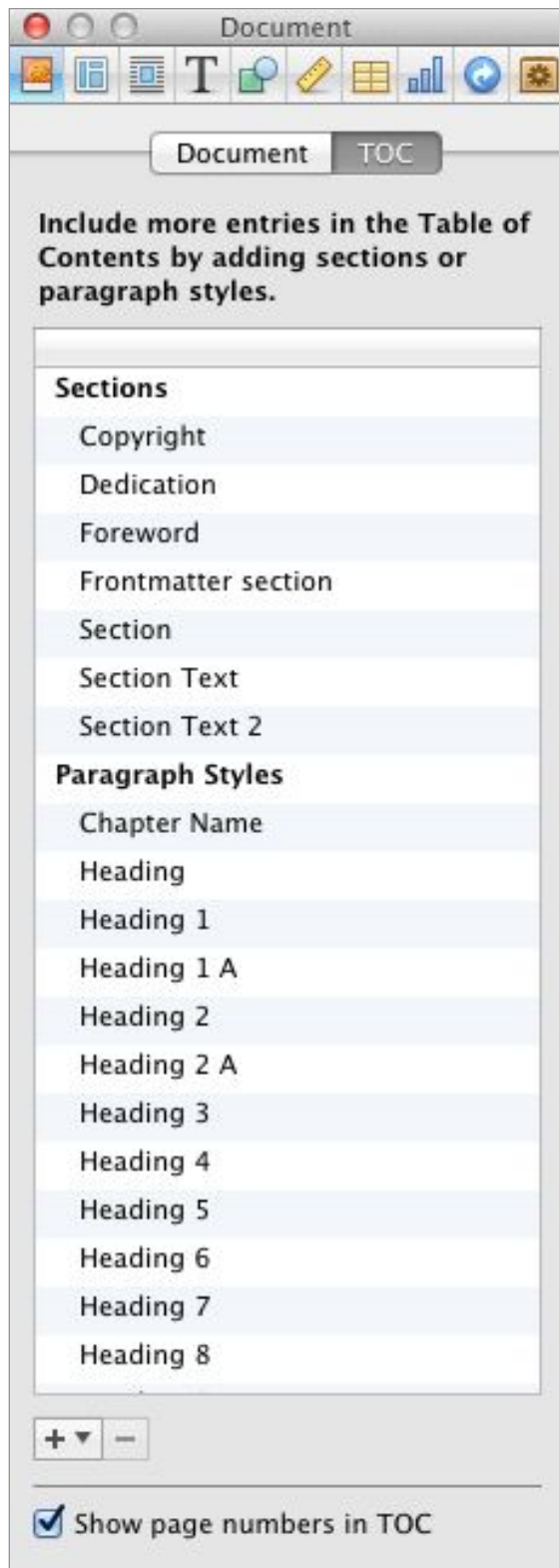


Figure 75: The TOC pane of the Document Inspector is where you add or remove Table of Contents items.

Any paragraph that has one of the listed paragraph styles assigned to it appears in the alternate portrait Table of Contents as a sub-section heading. Keep in mind, however, that where a paragraph style appears

in the TOC pane's list does not imply that style's nesting level in the Table of Contents. All paragraph styles listed in the pane appear at the same level in the alternate portrait Table of Contents.

The upshot? You really have only three levels of Table of Contents nesting available in a Multi-Touch book (and the third only in the alternate portrait Table of Contents of a Landscape with Portrait book). But that's more than two, and that extra level of TOC-goodness is more apt to be useful for the reader who is reading the book in its alternate portrait view than in the landscape view where the reader can see thumbnails of each and every page.

Although that extra level is not worth stressing about while you're in the throes of active composition, once that stage ends, it's a good time to go through your book and choose sub-sections that merit treatment as third-level Table of Contents entries for the alternate portrait view.

Preview Your Book

You can preview your book at any stage of the book building process, but if you don't do it at any other time (and you might not if you don't have ready access to an iPad), you should preview it when all the pieces of your book are in place. After all, although iBooks Author does give you a good idea of what your book will look like and how it will act, it doesn't provide a perfect simulation of your book running in iBooks on an iPad. For that, you need to have, well, iBooks on an iPad.

You'll also need your connector cable to attach your iPad to your Mac: you can't send a book preview wirelessly to an iPad with iBooks Author.

Here's how to put a preview of your book into iBooks on your iPad:

1. Connect your iPad to your Mac, and open the iBooks app. If your iPad starts to sync with iTunes, wait for it to finish syncing before taking the next step.
2. In iBooks Author, on the Toolbar, click Preview. You may see a reminder from iBooks Author to make sure the iPad is connected and iBooks is open on it. If so, dismiss the dialog; otherwise, make sure the device is connected, iBooks is open, and the iPad is not sleeping.

Note: If you've connected more than one iPad to your Mac, you see a dialog where you can select the iPad that receives the preview.

There is no step three. iBooks Author prepares a preview version of your book and transfers it to the connected iPad. After a while (it can be a few minutes if you have a big book with lots of media and an older iPad), your book opens on the iPad to the page on which you were last working.

Tip: You can also create a preview with a menu command: File > Preview. And the keyboard shortcut Command-Option-P is available, too, if you want instant access to the Preview command.

Once the preview is on the iPad, you can disconnect the iPad from your Mac. The preview stays on the iPad, so you don't have to be tethered to your Mac to view it. You can even close your book and open another one; the preview remains on the shelf of the default Books collection in iBooks (**Figure 76**), so you can open it again when you like.




Figure 76: A preview book, on the shelf in iBooks, suitably badged and available for proofing.

Previewing a single section: Choose *File > Preview Current Section Only* to send a preview of the currently selected section of your book to your iPad. The currently selected section is the one where the insertion point is located or where an item or some text is selected. Previewing individual sections can speed things up, especially when you have a big book with many sections and lots of widgets and other media, because much less data has to be transferred to your iPad.

You can use iBooks Author's General Preferences to choose whether the Preview command on the toolbar and the Command-Option-P keyboard shortcut previews the entire book or the current section. Whichever preview method you make your default, though, you can still choose the other method from the File menu.

Use Note-taking in iBooks to Track Problems

When you perform a final proofing pass over your book's content with a preview on an iPad, you can use iBooks' note-taking features to mark any problems you spot: touch and drag a highlight over the problem area, release your finger, and then tap again to access the highlight/note popover. Tap the Note button, type your note, and then tap the screen outside the note.

Later, back at your Mac with the marked-up preview to consult on the iPad beside you, you can use iBooks Author to sand down your vessel of knowledge's remaining rough patches. To review your notes quickly on the iPad, tap the Notes  icon on the book's toolbar (if the toolbar isn't showing, tap near the center of a page to reveal it).

There's never more than one preview copy of a particular book on an iPad. Whenever you preview your book with iBooks Author, the previous preview copy of that book, if any, is updated. Even if you move a preview to a different collection in iBooks, iBooks Author finds it and updates it.

Note: There is no way to transfer a preview from iBooks to another iPad. In the past, I've suffered from problems of galloping versionitis with multiple versions of proof copies of multimedia books hanging around, so I welcome Apple's one-iPad-one-proof implementation.

Make Advance Reading Copies

This may not be the Prime Directive for authors, but it is an important axiom: You are not your readers. How can you be? You are one person; they are (you hope) many. Moreover, they haven't yet read your book, while you have read it so often that you can quote swaths of its text in your sleep. Your readers have fresh eyes and varying expectations.

To make sure that the pellucid prose and cogent explanations in your book are pellucid and cogent for other people, you have to let other people read your book. That's where a time-honored technique from print-publishing comes in: advance reading copies (known as ARCs in the publishing trade).

To produce a full interactive copy of your book that you can distribute to your advance readers (whether by local network, Internet-based shared storage systems like Dropbox, as an email attachment, or some other method), do this:

1. Choose File > Export.
2. In the dialog that appears (**Figure 77**), click iBooks.

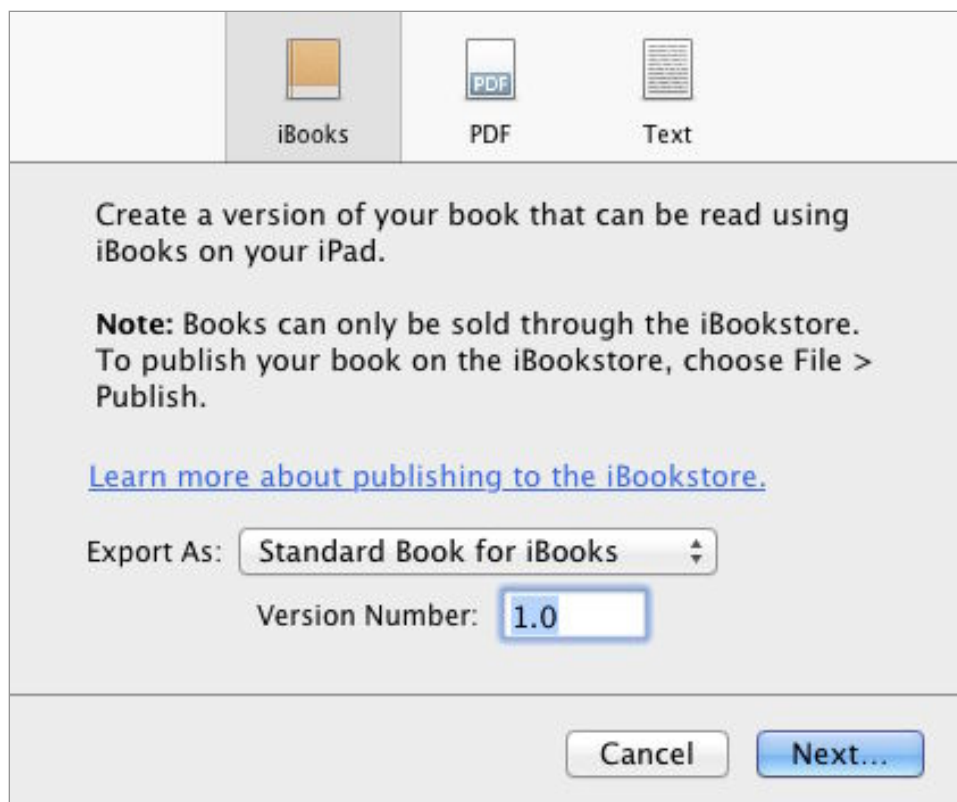


Figure 77: You can export your book as a complete iBooks book, a sample iBooks book, a non-interactive PDF, or as a text file.

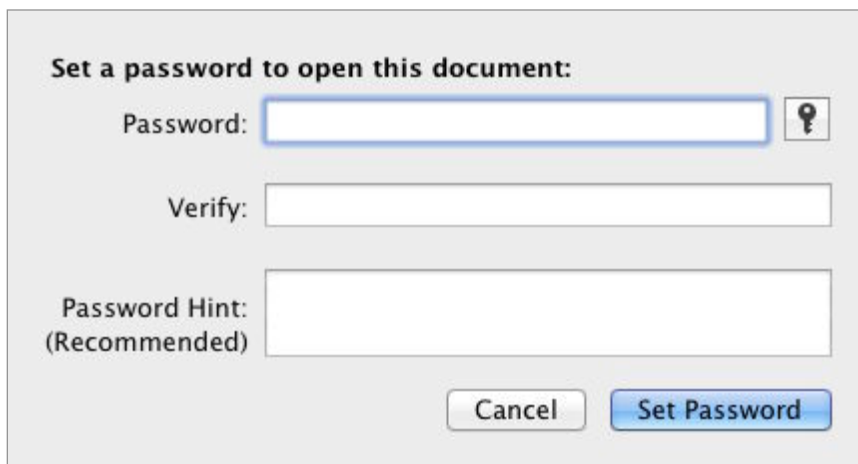
3. Choose whether you want to export the full book, or a sample suitable for uploading to the iBookstore. You can, optionally, give the book a version number (this last comes in handy after your book is published and you want to publish an update).
4. Click Next.
5. In the standard file dialog that appears, specify a local or network storage location for the file, and then click Export.

Note: You can add an exported Multi-Touch book to an iPad just like you can any other ebook: drop it in iTunes and sync it to your iPad, or use the Open In capability of mobile Safari, the Mail app, or another network application, like Dropbox, to get it into iBooks.


A complete copy of the Multi-Touch book is the best one to give to your chosen advance readers if you want reviews of the book with all of its features. However, because the full book is the one most likely to be pirated, and because distributing advance copies increases your exposure to such pilferage, iBooks Author allows you to protect exported Multi-Touch books with a password.

Do this before you export your book:

1. In the Document pane of the Document Inspector, click Require Password to Open.
2. In the dialog that appears (**Figure 78**), specify a password and an optional hint for the forgetful reader.



Set a password to open this document:

Password: 

Verify:

Password Hint:
(Recommended)

Figure 78: Protect your ARCs with passwords before you export them.

3. Click Set Password.

The password is assigned, and when you export the book the exported copy won't open until the reader supplies the correct password.

Keep track of your passwords! *You can't change or remove the password of a book in iBooks Author unless you know the password. When you assign a password to a book, make a note of it somewhere.*

Here are a couple of suggestions about ARCs and advance readers:

- **Choose a small, select group as advance readers:** You can get a lot of useful feedback from a few involved, intelligent readers. Choose just a handful of people. It makes both collecting feedback and keeping track of your reviewers easier, and it reduces the chances of piracy of your content.
- **Try PDF or text exports for some readers:** You may know of an intelligent and helpful person who would be a great candidate to receive an ARC, but woefully that person is without an iPad. Such a person can still review much of your book's content from a PDF or text export. Lower-bandwidth exports are also good when you want to get reviews of your text before the interactivity is all in place.

Note: The view you choose in iBooks Author affects PDF exports. That is, if you have the book displaying the portrait view, the exported PDF will reflect its layout; if you have the landscape view displayed, that's the layout used for the PDF.

Obtain an ISBN

In its most basic sense, *publishing* means to make something public, and you can do that with any Multi-Touch book you make with iBooks Author: just put it on an Internet-connected server somewhere and tell people, "Here it is, come and get it!"

On the other hand, if you want to distribute your book for free through many established ebook distribution systems or place it in libraries, your book needs an *ISBN*. The ISBN is the *International Standard Book Number* that book distributors and retailers use to keep track of their wares. The ISBN identifies your book uniquely: every different

edition or format of a printed book (e.g., paperback or hardcover), and every different version or edition or format of a published ebook (e.g., Kindle or EPUB), requires a unique ISBN that is not shared with any other published work.

Note: The iBookstore doesn't require that your book have an ISBN, but Apple nonetheless recommends it have one.

Usually, your publisher worries about the ISBN, and you, as author, need not concern yourself. However, if you are about to enter the world of self-publishing, read on.

First, ISBNs may or may not be free. You get them from the ISBN agency assigned to the country where the book is to be published (see <http://www.isbn-international.org/agency> for a list of ISBN agencies for various countries). In the United States, the agency is the U.S. ISBN Agency, run by Bowker (<http://www.isbn.org/>), and Bowker charges.

Buying a single ISBN is not cheap; the current U.S. price is \$125. However, the price per individual number plummets when you buy in bulk as most publishing firms do: they're only a dollar apiece when you buy a thousand at a time. Bowker's Identifier Services (<https://www.myidentifiers.com/isbn/main>) provides for online ISBN purchases.

Don't be fooled! *If anyone offers to sell you an ISBN at cut-rate prices, don't listen. Only the authorized ISBN agency for your country can distribute them legitimately.*

The U.S. ISBN Agency provides several FAQs and PDFs about ISBNs at http://www.isbn.org/standards/home/about/faqs_main.html. I recommend that you look them over.

Note: Even though the iBookstore doesn't require an ISBN, you do need one if you want your book to be listed in *Books in Print*, the authoritative bibliographic reference for currently available books (*Books in Print* is published, not at all coincidentally, by Bowker).

Set Up an iTunes Connect Account (If You Need One)

iTunes Connect is Apple's online service through which you manage uploads of content that you are distributing through Apple's iBookstore. Only people who either own or control content intended for digital distribution, or their authorized representatives, can apply for and receive such accounts.

Applying for an iTunes Connect account can take some time, so don't leave it for the last minute. For example, Apple currently requires that you have an Apple ID account that's set up for use on the iTunes Store and that is linked to a credit card. If you plan to sell your book (not just give it away for free), you'll also need a U.S. Tax ID even if you are located outside the United States.

Note: In some cases, you may need to create a new Apple ID just for using with iTunes Connect, even if you already have one; I didn't have to create a new one, but several colleagues of mine have.

Read the FAQ: For a quick iBookstore orientation in the guise of an FAQ, read the *Book Publishers: Frequently Asked Questions* page at <http://www.apple.com/itunes/content-providers/book-faq.html>.

Decide If You Need an iTunes Connect Account

Before you concern yourself with setting up an iTunes Connect account, you need to determine if you need one.

If you intend to give your ebook away for free, you can use any of the informal distribution methods that I mentioned earlier in this chapter, in [Make Advance Reading Copies](#). In that case, you do not need an iTunes Connect account, nor any formal affiliation with Apple. However, if you want to make your book available at no charge in Apple's iBookstore then you—or your publisher—need an iTunes Connect account.

Furthermore, Apple's iBookstore is the only place you can sell Multi-Touch books made with iBooks Author: that's stipulated in the license agreement that accompanies iBooks Author (you *did* read it, didn't

you?). So, if you intend to sell your book, you—or your publisher—*must* hook-up with Apple’s virtual media bazaar.

If your book has a publisher: *If some other entity will be publishing your ebook, then what I say below about the iBookstore may be almost completely for your amusement only, since your publisher (or, in the case of iTunes U, your educational institution’s iTunes U Project Manager) has the responsibility for handling the digital paperwork and the submission of materials to the iBookstore.*

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Prepare an iTunes Store Package (If You Need One)

An iTunes Store package is the final “file” that you upload to the iBookstore. (If you are giving your book away for free, but not through the iBookstore, you don’t need to create an iTunes Store package.) You create an iTunes Store package when your book is fully complete and fully tested, although you can try running through the process at any time.

To prepare the iTunes Store package:

1. In iBooks Author, choose File > Publish (Command-Shift-P), or click Publish on the Toolbar.

You see the Publish dialog as in **Figure 79**.

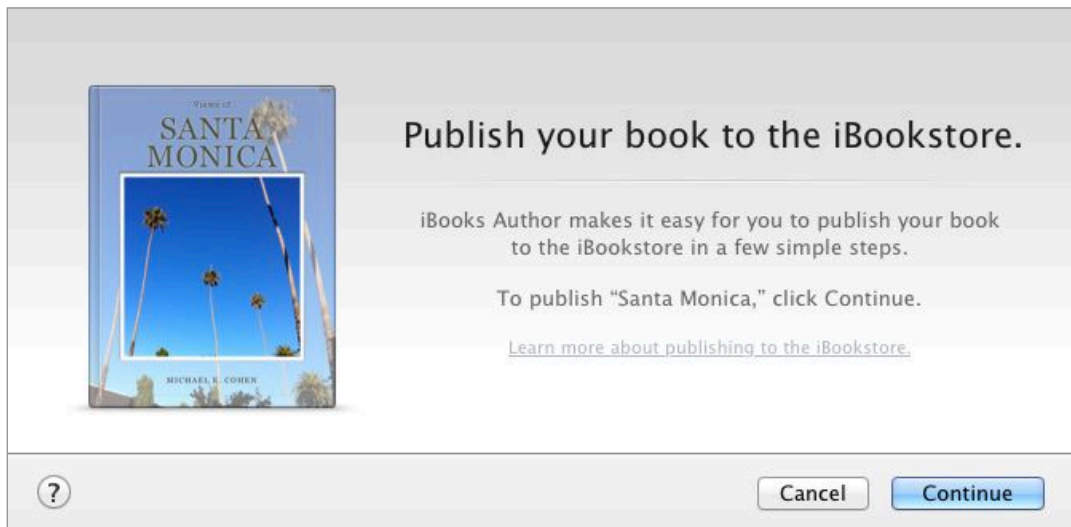


Figure 79: The Publish dialog is the first step in publishing your book.

A good time to learn more: Click the *Learn More about Publishing to the iBookstore* link in the Publish dialog to see Help topics related to publishing. They provide useful information, such as the current file-size limits for Multi-Touch books in the iBookstore (2 GB at the moment) and how to make sample books.

2. Click Continue, and follow the prompts. The Publish dialog walks you through the following steps:
 - Checking the book for errors. This check is made automatically.
 - Signing in to your iTunes Connect account. You fill in the Apple ID for your iTunes Connect account and its password. You must have an iTunes Connect account to publish a book with iBooks Author.
 - Specifying whether the book is a new one or an update to a previously published book.
 - Creating a downloadable sample book. You can choose the chapter from which the sample is taken, or create one manually. Automatically generated samples can contain up to 15 pages from your book.
 - Exporting the book and optional sample. This step creates a `.itmsp` package that contains the book, the sample (if any), some XML related to the book, and a cover file. The package is stored in the same folder as your iBooks Author file.


- ▶ Launching iTunes Producer using the data that iBooks Author created.

If you have iTunes Producer installed, iBooks Author automatically launches it after it saves your book's iTunes Store package, and hands iTunes Producer the package so it can access the information from the XML file (**Figure 80**). If you haven't yet installed iTunes Producer, as I suggested earlier, you are given the opportunity to download a copy during the publication process described above.

The screenshot shows the 'Book' tab of the iTunes Producer interface. The window title is 'Santa Monica book for v2.itmsp'. The 'Book' tab is selected, showing a form for book metadata. The 'Book Description' field is empty. The 'Print Length' is set to 14 pages. The 'Pre-order samples allowed' and 'Explicit Content' checkboxes are unchecked. The bottom navigation bar includes tabs for 'Info', 'Categories', 'Authors', 'Target Audience', 'Related Products', and 'Rights & Pricing'. 'Previous' and 'Next' buttons are located at the bottom right of the form area.

Figure 80: The first of many screens you need to fill out in iTunes Producer when you submit a work for publication.

Note: If you don't want to submit the book when iTunes Producer opens, just close it. You can always open iTunes Producer later by double-clicking the `.itmsp` file.

Filling out the fields on the many screens in iTunes Producer can be daunting. However, if you launch iTunes Producer manually, you see a Help  button on the startup screen. Click that to open the iTunes Producer online manual in your Web browser. This guide documents all the fields you need to fill out. (If only it were available as a Multi-Touch book...)

Once you fill in all the necessary data in iTunes Producer, you “deliver” the book to your iTunes Connect account on the last screen of iTunes Producer. Check your data carefully as you enter it: if you miss any required fields or enter incorrect data (such as a too-long description), iTunes Producer balks until you fix the problem.

It’s possible that, even after iTunes Producer has delivered your book, Apple may reject it for some reason or another. Don’t be afraid to push back if their requests seem excessive—several Take Control ebooks have been rejected for trivial reasons but were accepted after we explained our position clearly. And although it’s unlikely, Apple does reserve the right to refuse to publish an iBooks Author ebook for any reason they so wish. Arbitrary, yes, but it’s Apple’s walled garden, so Apple gets to set the rules.

After you’ve uploaded everything, it can take as long as a week (or even more) before your book appears for sale or download.

Warning! *Once a book appears in iTunes Connect, you can make certain changes, such as temporary pricing changes for a sale, on the iTunes Connect Web site. Be careful, however, because uploading a new copy of the book from iTunes Producer can overwrite the changes you’ve made on the iTunes Connect site.*

In addition, when you resubmit a book with new files using iTunes Producer, those files replace the files you see on the iTunes Connect site. However, any changes you make to the resubmitted book’s metadata on the first screen in iTunes Producer aren’t updated on the site. Instead, you must make those changes on the iTunes Connect site itself (some changes you make in iTunes Producer, like pricing data, do come through to iTunes Connect).

Bottom line: Always verify that the iTunes Connect site’s data is correct after you submit changes via iTunes Producer.

I won't go deeper into the details of the iBookstore publication process in this book. Apple's online stores, and the requirements and methods for selling or distributing through them, are continually evolving, and Apple's textbook publication initiative, which is only a little over a year old as I write this, continues to change as Apple fine-tunes its strategy for this new enterprise.

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About the Author



Michael E. Cohen began developing instructional software in the late 1970s, helped found one of the first university computer centers for the humanities in the 1980s, and was on the team that created the first commercially successful ebooks in the 1990s.

He is rumored to have several books to his credit, including a few Take Control books. He lives in Santa Monica, California. Yes, it is a nice place to live.

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I write paper books, too, like the [*iPhone 5 Kickstart*](#) book I wrote with my brother.

About the Publisher

Publishers Adam and Tonya Engst have been creating Apple-related content since they started the online newsletter *TidBITS*, in 1990. In *TidBITS*, you can find the latest Apple news, plus read reviews, opinions, and more (<http://tidbits.com/>).

Adam and Tonya are known in the Apple world as writers, editors, and speakers. They are also parents to Tristan, who has reached the age where he can read, understand, and find mistakes in the Take Control series.



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