

# Booktype

for Authors and Publishers

The open source platform to write, publish and manage print and digital books.

## USER GUIDE



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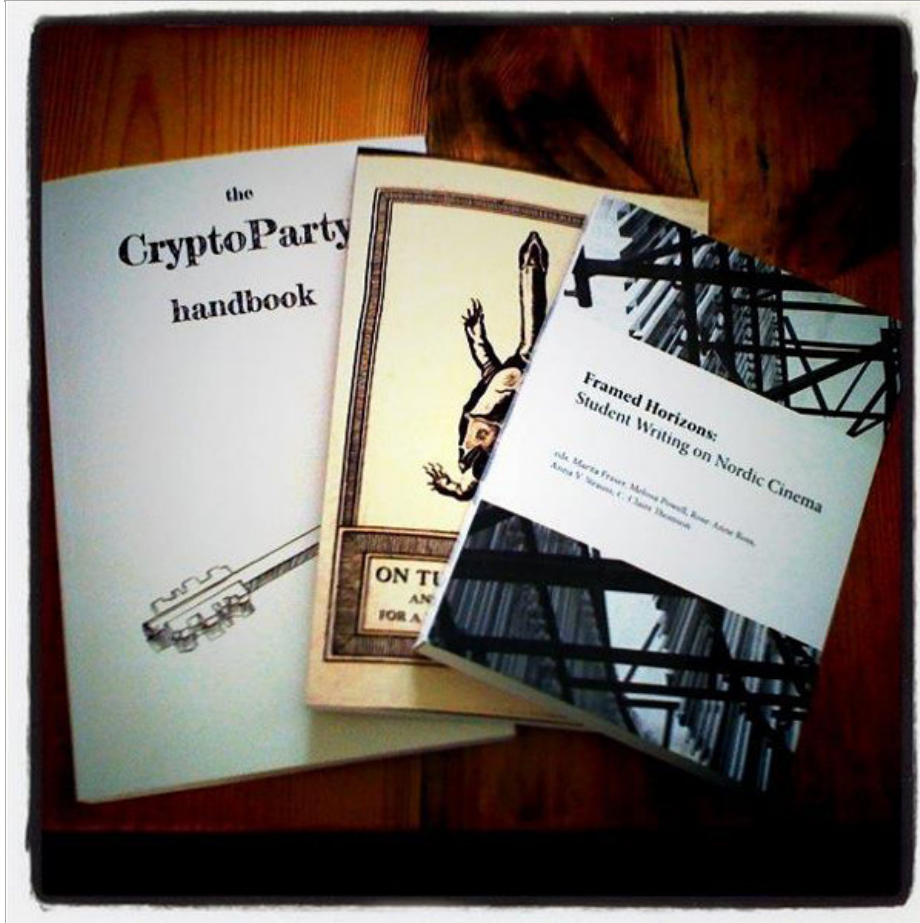
# **INTRODUCTION**

- 1. WHAT IS BOOKTYPE?**
- 2. ROLES AND PERMISSIONS**
- 3. GETTING STARTED**
- 4. MY DASHBOARD**
- 5. CONTROL CENTER**

# I . WHAT IS BOOKTYPE?

*Updated for Booktype 1.6.1*

With Booktype you can create books. Real, good-looking paper books you can hold in your hands. You can also use Booktype's powerful, quick output to PDF, EPUB, OpenDocument text and HTML to export books ready for Amazon, iBooks, or your preferred publishing outlet.



Booktype is designed to help you produce books with others, or by yourself. Booktype is also a social environment where you can discuss your views about producing books, seek assistance from others, or look for projects to contribute to.

Booktype is web-based software which means you do not install it on your computer; rather, you access it through a web browser. It is Free Software (licensed under the GNU Affero GPL), meaning that it can be freely downloaded, re-used and customised. You can install your own copy of Booktype on a server, or alternatively you can set up a cloud-hosted Booktype Pro account and let Sourcefabric, the non-profit organisation which produces Booktype, take care of installation, hosting and security.

Some typical uses of the platform might be:

- Writing books - a work of fiction, manuals, cookbooks etc.
- Producing printed books
- Producing ebooks
- Writing any content as an individual
- Collaboratively authoring content
- Rapidly developing content in 'book sprints'
- Customising existing content to apply to a very specific context
- Translating a book into another language

While you can use Booktype to support traditional book authoring processes, Booktype also supports the rapid development of content in 'book sprints'. A book sprint is an intensive collaborative event where typically six to ten people can focus on writing a book in three to five days. These collaborators might be in the same room or located around the Internet; in either case, they work together simultaneously to produce a book.

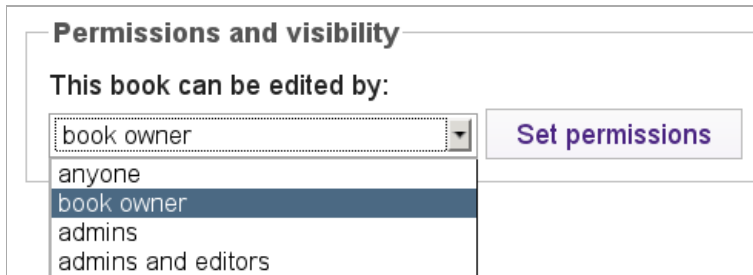
Booktype was originally developed to facilitate the accelerated production models enabled by book sprints. Hence the feature set matches the rapid pace of publishing possible in the modern era of print-on-demand. Using Booktype, print ready source (book formatted PDF) can be generated in a few minutes, and then uploaded to your favourite print-on-demand service.

Whether you are collaborating, writing solo, rapidly developing books, or taking your time - after you have worked with Booktype, you will never think of publishing the old way again.

## 2. ROLES AND PERMISSIONS

After you have logged into the Booktype server, you will be able to create and edit your own books. Since Booktype is a collaborative environment, there needs to be control over access to shared books. There are a number of roles that Booktype users can have, which enable different levels of permissions.

Most of these roles and permissions are managed from the **Settings** tab of a book's edit interface - see the chapter *Settings* for more information.



**Permissions and visibility**

This book can be edited by:

book owner

anyone

book owner

admins

admins and editors

Set permissions

### ANYONE

All users logged in to Booktype can edit books that others have created if those books have been set as editable by 'anyone'. This is the most open level of access, and is suitable for environments in which all users are trusted.

### BOOK OWNER

You will automatically become the 'Book owner' of any books that you create. Book owners can add collaborators by assigning 'Administrator' and 'Editor' roles to other people. This distinction between administrators and editors enables a more finely controlled level of access.

### EDITOR

You can be made an editor of a book you have not created yourself, if a 'book owner' gives you this role for a specific book. This gives you the ability to edit the book, but not to set the permissions of other contributors.

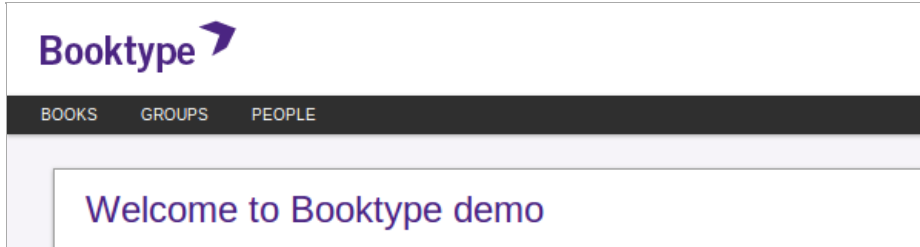
### SUPER USER

When Booktype is installed on a server, a 'super user' account is created. This account is for the person or people who manage that Booktype installation, and gives write access to all books on that Booktype installation, as well as the ability to perform tasks such as reset passwords, rename files and remove books. This is the highest level of control available and should be restricted to trusted and responsible persons only.

# 3. GETTING STARTED

Open the URL of the Booktype server in your web browser. If you do not yet have a Booktype server or an account on Booktype Pro, you can use the demonstration site <http://booktype-demo.sourcefabric.org/> to follow the chapters in this manual.

Near the top left corner you will see the site logo and the three main Booktype menus: **BOOKS**, **GROUPS** and **PEOPLE**. The following three sections of this manual relate to the functions of these three main menus.



In the top right corner you will see the link to **Sign In / Create Account**, and if configured, links for the interface languages installed on this server. You may prefer to switch to your native language before continuing.



## CREATING AN ACCOUNT

You can read book drafts without signing in, but you will need to have a user account before you can write or edit a book.

<h3>Sign in</h3> <p>User name</p> <input type="text"/> <p>Password</p> <input type="password"/> <p><a href="#">Forgotten your password?</a></p> <p><input type="button" value="Signin"/></p>	<h3>Create account</h3> <p>User name</p> <input type="text"/> <p>Password (6 characters at least)</p> <input type="password"/> <p>Full name</p> <input type="text"/> <p>Email</p> <input type="text"/> <p><input type="button" value="Create account"/></p>
--	---

If your system administrator has not already created an account for you, it's simple to create one for yourself with the following steps:

1. Under **Create account** enter your desired *User name*, *Password*, and *Full name*, then your *Email*. The security of your Booktype account depends on the strength of the password you set here, so you should avoid using easily-guessed passwords. Your full name is required as it is used for copyright attribution on any works you create or contribute to.
2. Click the **Create account** button.



3. Booktype will generate the new account, sign you in, and redirect you to your **Dashboard**, the control panel for your books and settings.

Once you are signed in, a link **MY DASHBOARD** appears on the left side of the main menu. The **Sign In / Create Account** link in the top right corner changes to display your user name. Clicking on this link from any page will also take you back to your **Dashboard**. To the right of your user name there will be a link to **Sign out**, and a link to **Post a message** to another Booktype user.

# 4. MY DASHBOARD

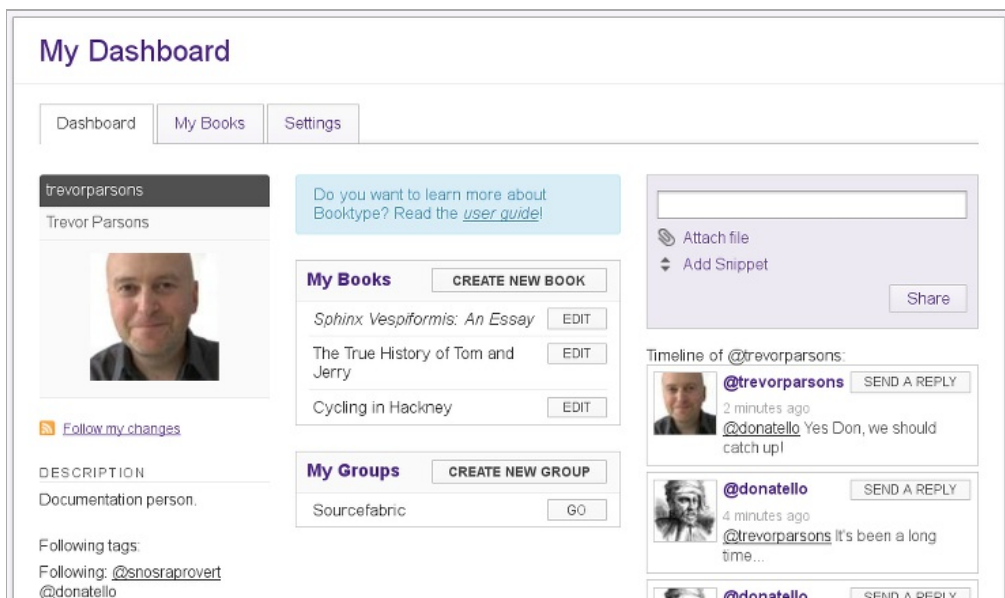
Your Dashboard helps you to manage your books and groups, edit a number of settings to customise your profile on the Booktype server, and communicate with other Booktype users.

In the **Dashboard** tab, there is a link **Follow my changes** below your user name, full name and profile picture, which points to an RSS feed of any writing or editing work that you do on the Booktype server. This feed URL can be used by external programs to enable other people to follow your work.

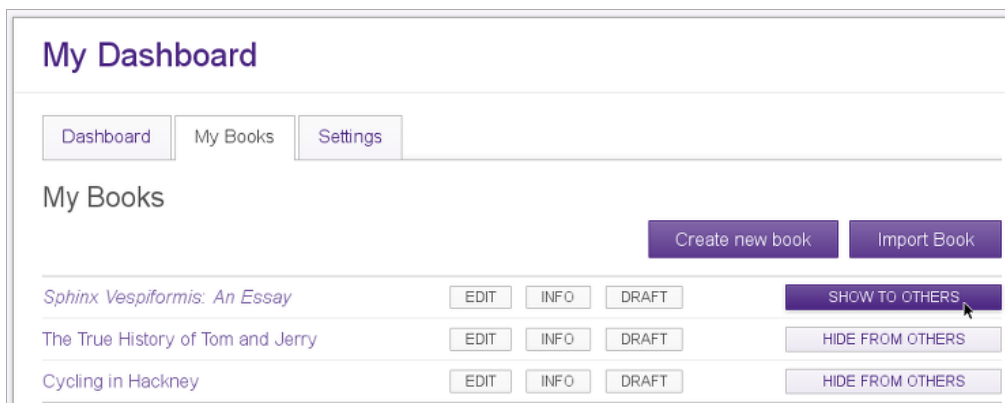
If you look at another Booktype user's Dashboard, you will see an additional **Follow me** button just above the RSS feed link. Clicking this button adds the other person to the **Following**: list beneath the **DESCRIPTION** field on your Dashboard. This action means that you will receive notifications each time a person that you are following sends a public message. Any Booktype users that are following your messages will be listed as **Followers**: beneath this.

On the right side of the Dashboard tab is a messaging window. You can send a short message by entering text into the field and clicking the **Share** button. This message will then be shared with your followers on the Booktype server, and displayed in the **Timeline** box underneath. Optionally, you can click the **Attach file** link to open a file browse box and attach a file to the message, or click the **Attach snippet** link to send formatted text and a context link with the message.

You can send a message to another Booktype user even if they are not following you, by including their user name in the message, prefixed by the @ sign.



The **My Books** tab lists the books you have created. The **EDIT** button opens the book on that row for editing, while the **INFO** button opens a page with an overview of the book's details, versions and recent activity. The **DRAFT** button opens the latest version of the book for reading or following. Click the **HIDE FROM OTHERS** button to make the book listed on that row private, or if the book is already hidden and you wish to make it public, click **SHOW TO OTHERS**.



To view your settings, click the **Settings** tab. Here you can edit your **Email** and **Full name** if either of those were typed incorrectly, or if they change in the future.

Below your full name is a text box where you can type in a description **About yourself**. If a Gravatar image is available for the email address that you used to create your Booktype account, that will be used as your **Profile image**. Alternatively, you can click the **Browse...** button to search your computer for a profile image to upload, if you wish.

There is also a field for the **Notification filter**, which configures the email notifications you will receive. For example, entering a Booktype user name prefixed with the @ symbol into this field will mean that all messages from that user will be forwarded to your account email address.

**My Dashboard**

Dashboard My Books Settings

### User settings

Email  
user@example.com

Full name  
Example User

About yourself  
This is an example biography.

Profile image  
Browse...

Notification filter

Save changes

Once you have made the changes you want, click the **Save changes** button.

## CHANGING YOUR PASSWORD

Over on the right side of the **Settings** tab, you can change your Booktype account password by entering the **Old Password** once and the **New Password** twice. Then click the **Change password** button.

The screenshot shows a web interface with a 'Settings' tab. On the left, there are three empty text input fields. On the right, there are three password input fields labeled 'Old Password', 'New Password', and 'Password (again)'. Each password field contains a series of black dots. Below the 'Password (again)' field is a link that reads 'Forgotten your password?'. At the bottom right of the form area is a purple button labeled 'Change password' with a mouse cursor pointing to it.

Click the **Forgotten your password?** link to open a new page in which you can enter either your Booktype username or account email address to obtain a password reset link by email. Please note that sending password reset links by plain email can compromise the security of any server, including Booktype, should your email account become compromised. Therefore it is more secure if you can remember your passwords!

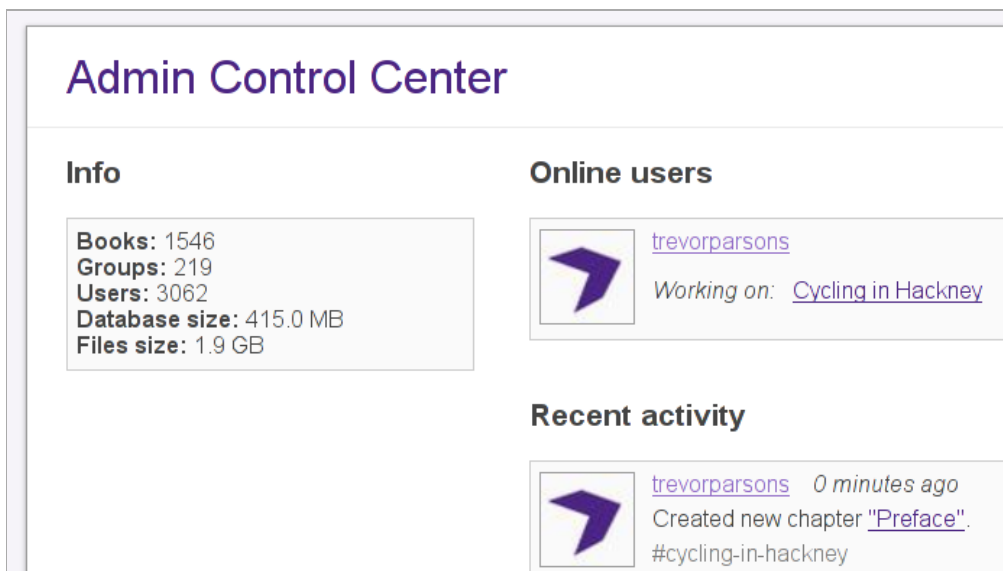
The screenshot shows a page titled 'Forgot your password' in purple text. Below the title is a text input field with the placeholder text 'USERNAME OR E-MAIL ADDRESS' and the value 'user@example.com'. Below the input field is a line of text: 'Give us your username or e-mail you used to create Booktype account and we will send you new password.'. At the bottom left is a purple button labeled 'Send request' with a mouse cursor pointing to it.

# 5. CONTROL CENTER

If your Booktype account has administrator privileges, you will see an extra link to 'Control Center' next to your user name in the top-right corner of your browser window.



Clicking this link will bring you into the Booktype Control Center, in a section called the Admin Control Center. This section provides you with an overview of the resources and current activity on your installation of Booktype. Displayed here are the total number of books, groups and users on the system; the amount of disk space being used by the Booktype database and by the files it is organizing; the users who are currently online working on their books; and a timeline of recent activity.




**Admin Control Center**


**Info**

- Books: 1546
- Groups: 219
- Users: 3062
- Database size: 415.0 MB
- Files size: 1.9 GB

**Online users**

-  [trevorparsons](#)  
Working on: [Cycling in Hackney](#)

**Recent activity**

-  [trevorparsons](#) 0 minutes ago  
Created new chapter "[Preface](#)".  
[#cycling-in-hackney](#)

You can get back to this overview any time by clicking on the Admin Control Center link in the black navigation bar at the top of the page.

The other links available in the navigation bar are People, Books, and Settings.

There's also a Site link, which takes you out of the Control Center and into a normal user's view of your Booktype installation.

## PEOPLE


Any Booktype user can view the other users who are registered on the site, but a user with access to the Control Center can click on the People link to make various changes to other users' accounts.

Selecting a username from the list in People will bring you to a summary of information about that user's account on your Booktype site, including the user's books, groups and activity. There are two additional buttons: Edit Info and Change Password. The facility for changing the user's password is self-explanatory. Edit Info brings you to a screen where you can change key details of the user's account: Username, Full Name, Email, and User Description. You can also upload a new profile picture for the user.

**trevorparsons**

EDIT INFO CHANGE PASSWORD

Successfully saved changes.



**Username:** trevorparsons  
**Full name:** Trevor Parsons  
**Email:** booki.cc@trevorparsons.com  
**Joined:** July 20, 2012, 11:47 a.m.  
**Last login:** July 20, 2012, 1:18 p.m.  
**About yourself:**

Books Groups Activity

- [Cycling in Hackney](#)

Clicking on the **Add New Person** link in People brings to a screen where you can add a new user. This will be the only way of adding new users if you opt not to allow unregistered visitors to create an account for themselves (see *Privacy setting* below).

**Add Person**

Username:

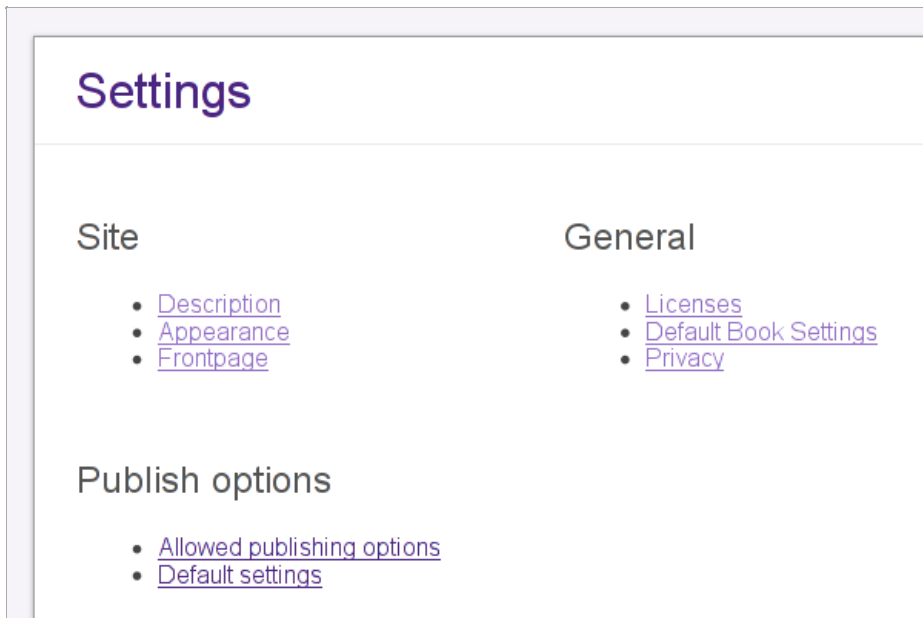
First name:

Email:

User description:

## SETTINGS

In the Settings section, you can make a number of important changes to your Booktype installation.



### Site

The Site sub-section contains three links: Description, Appearance, and Frontpage.

In the Description page, you can set or change your site's title, tagline, and favicon (the small icon that appears next to your site's address in a web browser).

The screenshot shows the "Site description" form. It contains the following elements:

- Site title:** A text input field containing "Book Manufactory".
- Tagline:** A text input field containing "Let's make a book!".
- Favicon:** A text input field that is currently empty, followed by a "Browse..." button.
- Buttons:** "Save changes" and "Cancel" buttons are located at the bottom of the form.

The Appearance screen allows you to make custom changes to the CSS used in your Booktype site.

The screenshot shows the "Appearance" form. It features a single large text input field labeled "CSS:" on the left side, which is currently empty.

The Frontpage page lets you change the welcome message which is seen by users and visitors when they arrive at your Booktype site, and control whether or not a timeline of recent activity is displayed.

The screenshot shows a dialog box titled "Frontpage". It contains a "Welcome message:" label followed by a large empty text input field. Below this is a "Show activity:" label with a checked checkbox. At the bottom of the dialog are two buttons: "Save changes" and "Cancel".

## PUBLISH OPTIONS

The Publish options sub-section contains two links: Allowed publishing options, and Default settings.

### Allowed publishing options

Here you can control which publishing channels and output formats your users will be able to publish their books to. These options are described in the *Publishing* chapter of this book.

The screenshot shows a dialog box titled "Publishing". It contains a list of publishing options, each with a checkbox: "book:" (checked), "ebook:" (checked), "lulu:" (unchecked), "PDF:" (checked), and "ODT:" (checked). At the bottom of the dialog are two buttons: "Save changes" and "Cancel".

### Default Settings

Here you can customize the CSS used by Booktype when outputting books to the various publishing channels and formats it supports: Print PDF, E-Book, Lulu, Screen PDF, and OpenDocument Format.



## Publishing defaults

```
Book CSS: .objavi-chapter{
           color: #000;
           }

           body { word-wrap: break-word;}

           img {
             max-width:95%;
             height:auto;
           }

           a {
             text-decoration:none;
             color:#000;
           }

           h1 .initial{
             color: #000;
           }
```

### GENERAL

The General sub-section contains three links: Licenses, Default Book Settings, and Privacy.

#### Licenses

When a user creates a book, they can choose from a number of copyright licenses under which the book will be published, including 'All rights reserved' if you wish to allow that. Please note that if you wish to enable authors to upload content to your Booktype installation which is not under a free culture or other open license, you will need to have copyright agreements in place with the relevant rights holders.

In this page, you can list the books which are being published under each license. It is also possible to add a new license by filling in its abbreviation and name. (Best to pick an existing license, though - we wouldn't want to add to the already confusing proliferation of free and open content licenses!)

## New license

Abbreviation:

Name:

## Licenses

[CC - 0 - CC - 0](#)

[CC-BY - CC-BY](#)

[CC-BY-SA - CC-BY-SA](#)

[GPL - General Public License](#)

[MIT - MIT](#)

[Public Domain - Public Domain](#)

### Default Book Settings

Two settings are available when you follow the Default Book Settings link, in a screen entitled Book Create.

The Default Visibility setting defines whether or not a newly created book can be seen by other users. If ticked, this also means that by default new books will be editable by any user.

The Default License drop-down menu enables you to set which copyright license new books will be placed under. If you choose the null option at the top of the list then no license will be automatically set.

Users can change both of these settings for themselves at any time by following the **Edit This Book** link, clicking the Settings tab and choosing from the options available in the relevant drop-down menus.

## Book create

Default visibility:  If it is turned on then all books will be visible to everyone.

Default License:  Default license for newly created books

### Privacy

The Privacy section contains three options.

The **Anyone can register** checkbox sets whether or not an unregistered visitor to your Booktype site can make an account for themselves. If you opt not to allow this, you can make accounts for users by clicking the **Add New Person** link in the People section, as described above.

The other two checkboxes control who can create and import books. Leave them unchecked if you would like your users to be able to create and import books themselves.

## Privacy

**Anyone can register:**  Anyone can register on the site and create account

**Only admin can create books:**

**Only admin can import books:**

Save changes

Cancel

# **BOOKS**

- 6. CREATING A BOOK**
- 7. IMPORTING A BOOK**
- 8. DELETING A BOOK**
- 9. THE EDIT INTERFACE**
- 10. CREATING CHAPTERS**
- 11. EDITING A CHAPTER**
- 12. THE TABLE OF CONTENTS**
- 13. ADDING IMAGES**
- 14. SETTINGS**
- 15. PUBLISHING**

## 6. CREATING A BOOK

All books are created from your Dashboard using the Book Wizard.



1. Click on **CREATE NEW BOOK**
2. The Book Wizard will open, asking for the title of the book. This is the only required information. Once you have entered a title, you can complete the wizard by clicking on the 'Create' button now or during any of the remaining steps.
3. Optionally, you can continue to through the remaining four steps of the wizard, which are: entering a description for your book; choosing a copyright license; uploading an image to accompany the description of the book in Booktype; and choosing whether or not the book should initially be hidden from others on your Booktype server. All of these items can be entered or changed later.
4. Once you press Create you will be redirected to the book's Info page.
5. You can always access your books from your Dashboard. Your books are listed under the **My Books** tab (on your Dashboard) as well as in the list of **My Books**.

**Note:** Booktype will not let you create two books with the same name.

# 7. IMPORTING A BOOK

Books can be imported from several sources, **Archive.org**, **Booktype** and **epub** files. In this chapter we go through each of these scenarios.

To import a book visit your Dashboard and click on the My Books tab. Click on the Import Book button.

A pop-up box will appear with import options:

### Import book

Import type:

Select Import Type

Select Import Type

Import EPUB

**Import archive.org book**

Copy or import Booktype book

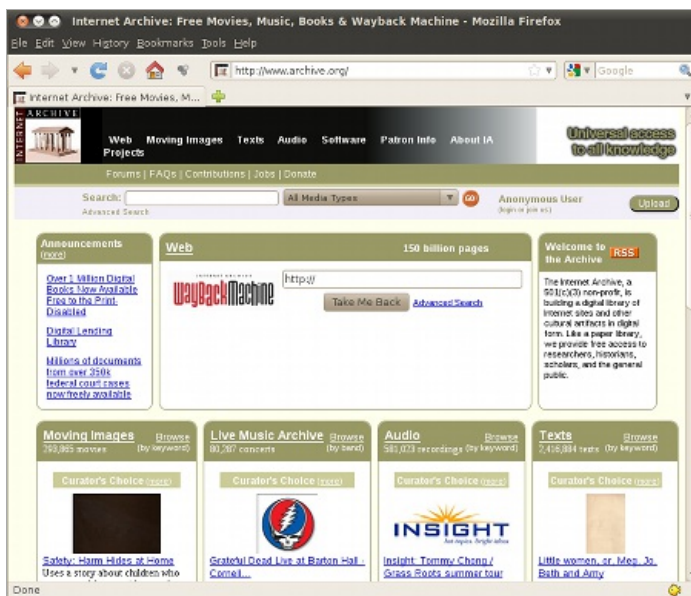
New title (optional):

Initially hidden from others

Choose the desired import type and enter the appropriate ID or URL as described.

**Note:** When importing text into Booktype from its respective locations and formats it is important to note that the document structure may not be a part of the source file. This would leave the entire text in a single chapter which will need to be broken up into its individual chapters and sections once in Booktype.

## ARCHIVE.ORG



The **Internet Archive** (<http://www.archive.org>) is a non-profit digital library storing digitised collections of websites, music, moving images, software and *books*. With its stated mission of "*universal access to all knowledge*.", its purposes include offering permanent access for researchers, historians, scholars, people with disabilities, and the general public to historical collections that exist in digital format.

On your **My Books** tab click on **Import Book** and select **Import Archive.org book** from the drop-down list, enter the **Archive.org ID** and press **Import**. The Archive id can be found in the **Identifier** field under the **Selected metadata** section at the bottom of the text's page on Archive.org.

Once the process has finished the imported book will be added to the list of books on your **My Books** page and **Dashboard**.

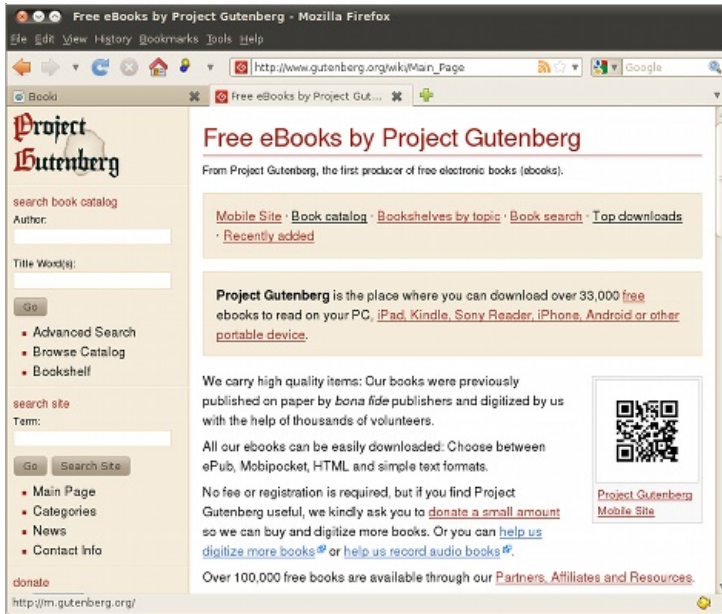
## EPUB



ePub, short for Electronic Publication is an open standard e-book format, that has the ability to optimise the text display for whichever device is viewing the book. ePub documents can be read by several different devices, including the Kindle, iPhone, iPad and any computer with ePub reading Software installed. Booki has the ability to import any document in ePub format.

**NOTE:** although ePub is an open format, not all books available in ePub format have open licences. Therefore, care needs to be taken when choosing to import an ePub document to ensure that it contains a permissive copyright.

- Project Gutenberg (<http://www.gutenberg.org/>) is a good place to start looking for openly licensed books in ePub format. It is an organisation dedicated to making books freely available in forms the vast majority of users, hardware and software can easily read, use, quote and search.



To import an ePub document, first you need to get the url for the ePub book, then copy its location. Then on your **My Books** tab click on **Import Book** select **Import epub** from the drop-down list. Paste the ePub URL into the **enter epub URL** text box and click on **Import**.

Once the process has finished the imported book will be added to the list of books on your **My Books** and **Dashboard**.

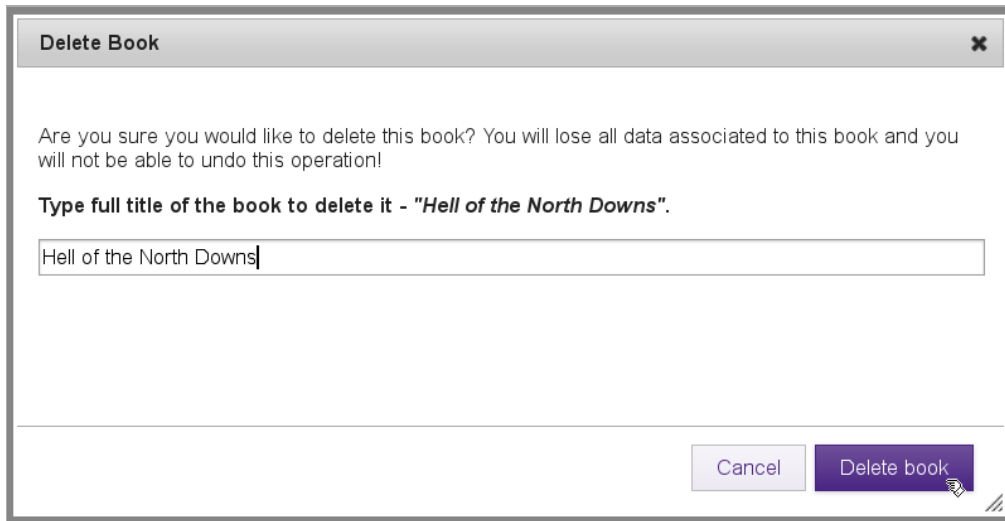
## IMPORT BOOKTYPE BOOK

It is possible to import books from other Booktype installations. Using this process you can also clone or copy entire books from the same Booktype installation - the process is the same. First you need to get the URL for the book, then copy it's location. Then on your **My Books** tab click on **Import Book** select **Copy or import Booktype book** from the drop-down list. Paste the URL into the text box and click **Import**.

Once the process has finished the imported book will be added to the list of books on your **My Books** and **Dashboard**.

## 8. DELETING A BOOK

In rare circumstances, you may wish to delete a book from your Booktype server or Booktype Pro account. To do so, from the **Dashboard** to go the **My Books** tab and click on the **INFO** button corresponding to the book in question. The book's info page will appear. Click the **Delete book** button at the top right of the page. A **Delete Book** dialog will appear.



**Delete Book** ✕

Are you sure you would like to delete this book? You will lose all data associated to this book and you will not be able to undo this operation!

Type full title of the book to delete it - "Hell of the North Downs".

Cancel Delete book

Deleting a book in Booktype is an irreversible process. All the data associated with the book will be lost.

As a safeguard against careless deletion of books, you will be asked to type the full title of the book into the dialog before you are allowed to delete the book.

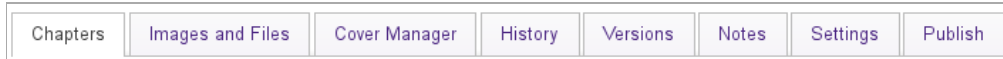


# 9. THE EDIT INTERFACE

Once you have created your book, click on the **EDIT** button to enter the edit interface and begin work on the content.

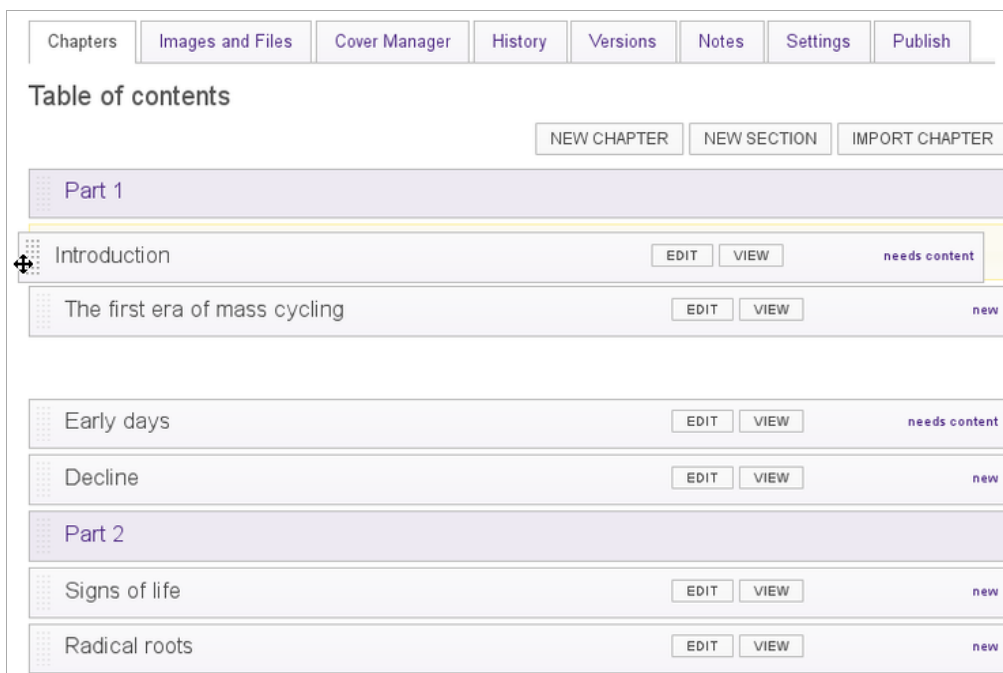
On the right-hand side of the screen, there is a chat box and beneath it a list of the people currently editing this book. You can chat with each other while you edit. The chat window will also display notifications when someone joins, saves or creates a chapter, or does other actions.

Across the top of the screen are a series of tabs which enable different functions in the book editing process. These tabs are explained briefly below, and two of them - **Settings** and **Publish** - have their own chapters which give more detail.



## CHAPTERS

Click on the **Chapters** tab to see a list of all of the chapters in your book. From here, you can create or import a new chapter, edit an existing chapter, and create a new section. You can also arrange the order of your sections and chapters by dragging and dropping the bars, and set the current status of each chapter, as detailed in the chapter *Communications*.



## IMAGES AND FILES

From this tab, you can see a list of all the images you have uploaded to add to your book. You can also upload images here before placing them in a chapter, and you can delete unwanted images if you have the necessary privileges.

## COVER MANAGER

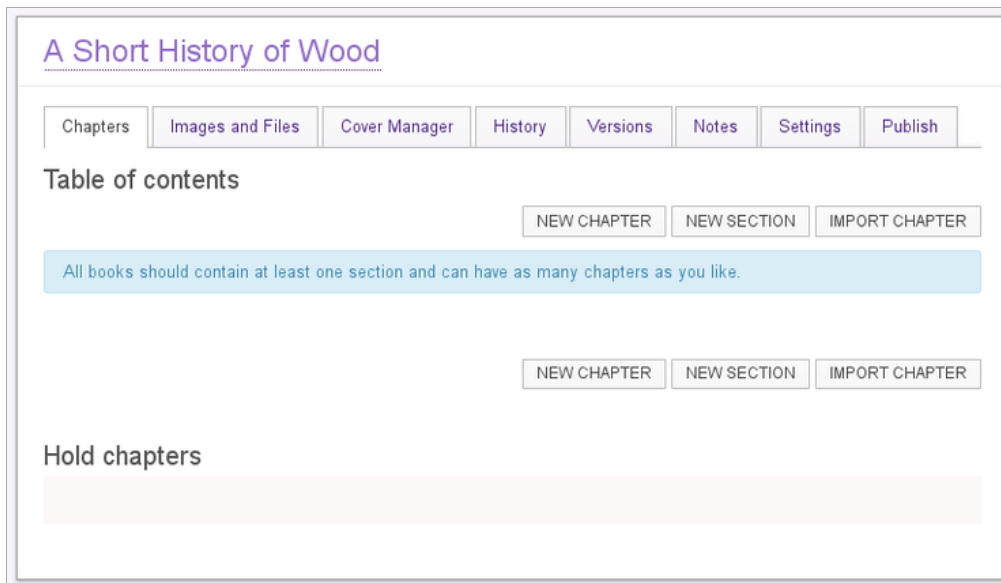
The cover manager allows you to upload and manage covers for your book. You should upload your ebook cover image files (JPEG, GIF or PNG format) in the appropriate dimensions for EPUB, MOBI, screen PDF and ODT output. Artwork (in TIFF, XCF, PSD, PDF, PS, SVG, EPS, AI or INDD format) for the front cover, spine and back cover of your print books can be uploaded and managed, but will be kept separate from the text of the book when publishing it.

When you upload an image, the Enter Meta-data dialog enables you to specify associated details including the size and format of the book, whether the image is intended to be the front cover, back cover, spine, full cover or e-book type, as well as the license for the image.



# 10. CREATING CHAPTERS

Once a new book is created click on the **edit** button next to the title of the new book on your Dashboard to open the book's editing page. You can also access an edit button from the book info page.



You will see the book open on the Chapters tab. This page is divided into two areas, the top area is the **Table of contents** and the bottom area is called **Hold chapters**. Any chapter residing in Hold chapters will not be included when you publish your book.

## CREATING A CHAPTER

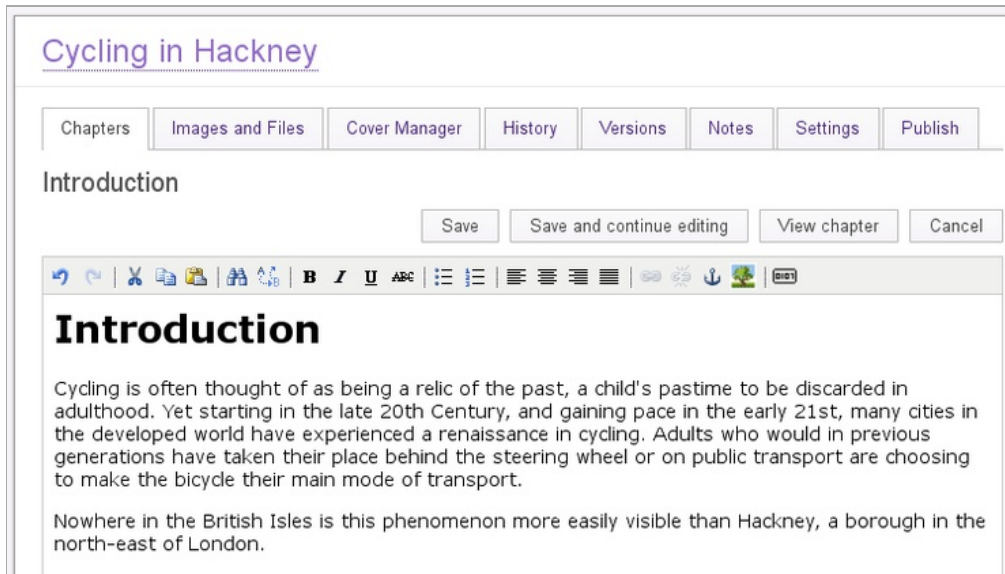
1. In the Chapters tab on the editing page click on **NEW CHAPTER** at the top or bottom of the Table of contents.
2. The New chapter window opens. Enter the Title of your new chapter and click Create chapter.

# 1. EDITING A CHAPTER

Once you have created chapters, content needs to be added to them (text and images). This is probably how you will be spending most of your time in Booktype: writing material, reviewing, editing and updating chapters, as well as inserting and organising images.

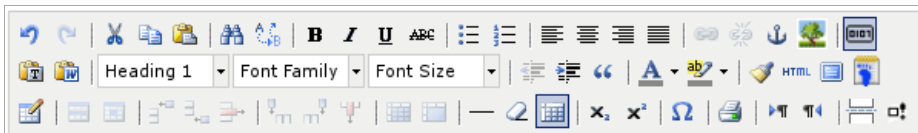
## ACCESSING THE CHAPTER EDITOR

1. First you need to be in the Editing page for the book you are working on.
2. Make sure the Table of contents is visible by clicking on the Chapters Tab.
3. Then click on the EDIT link next to the chapter you want to edit.
4. The **Chapter editor** opens showing the Chapter Title and any content that has already been added.
5. Type away!



## EDITING TOOLBAR

At the top of the chapter editor you will see a toolbar offering a set of tools similar to those offered by word processing software. There are icons for undo/redo, cut, copy and paste, find/replace, simple formatting and alignment, creating links, and uploading images. Clicking the rightmost icon gives access to a further two rows of icons offering more advanced editing functions.



Mousing over an icon will result in a tooltip popping up to explain its function. These advanced functions include selecting predefined text styles, editing the underlying HTML code, inserting special characters, and inserting page breaks so as to avoid widows and orphans when the book is published.

For speed of editing, the common 'Control+' keyboard shortcuts for copy/cut/paste, bold/italic and undo/redo also work in Booktype's chapter editing interface.

## SAVING YOUR WORK

As with every other software application you need to save your work regularly to avoid losing those hours worth of effort due to your laptop battery going flat or some similar incident.

Booktype has three buttons concerning saving your work which are located at the top of the Chapter editor. They are Save, Save and continue editing and Cancel.

**Save** : clicking on Save will not only save your changes to the chapter, but will also close the Chapter Editor and return you to the book's Table of Contents.

**Save and continue editing** : This button saves your changes but leaves the editor open for you to continue making changes to the chapter. This is the button to use regularly to ensure you don't lose the changes you have made to the chapter.

**Cancel** : This button is only used if you decide that you don't want to keep the changes that you have made to the chapter.

To keep a track of what changes you made, and to inform fellow contributors, you may wish to add a summary to the **Author comment** field at the bottom of the page before saving.

# 12. THE TABLE OF CONTENTS

Once several chapters have been created and developed, it is time to organise and order your Table of Contents.

## ADDING SECTIONS TO YOUR TABLE OF CONTENTS

To add sections to a book:

1. On the editing page click **NEW SECTION** at the top or bottom of the **Table of contents**.
2. The **New section** window opens. Enter the title of your new section and click **Create section**.
3. The new section is created and placed at the bottom of the Table of Contents.

## ORGANISING THE TABLE OF CONTENTS

Inside a book's **Chapters** tab, the page is divided into two areas; the top area is the **Table of contents** and the bottom area is called **Hold chapters**. Any chapter residing in **Hold chapters** will not be included when you publish your book.

### Re-ordering Sections and Chapters

If your sections need to be re-ordered, **click** and **hold** on the Section or Chapter you wish to move, then **drag** it up or down to its rightful place. To remove a section or chapter, drag it down into the **Hold chapters** area. Sections dragged to the Hold Area are deleted, but Chapters are not deleted.

## EDITING CHAPTER TITLES

Once a chapter or section has been created, you may not always like the title, or you might be re-organising the entire book and therefore chapters and sections need to be re-named for the new structure:

1. Open your book's **Edit** page and make sure the **Chapters** tab is selected.
2. **Double-Click** on the chapter or section name that you want to change. A text field opens allowing you to change your title.
3. Make any changes you desire and then click on the **SAVE** button to the right of the text field. **CANCEL** will of course cancel any changes made and return you to the previous title.

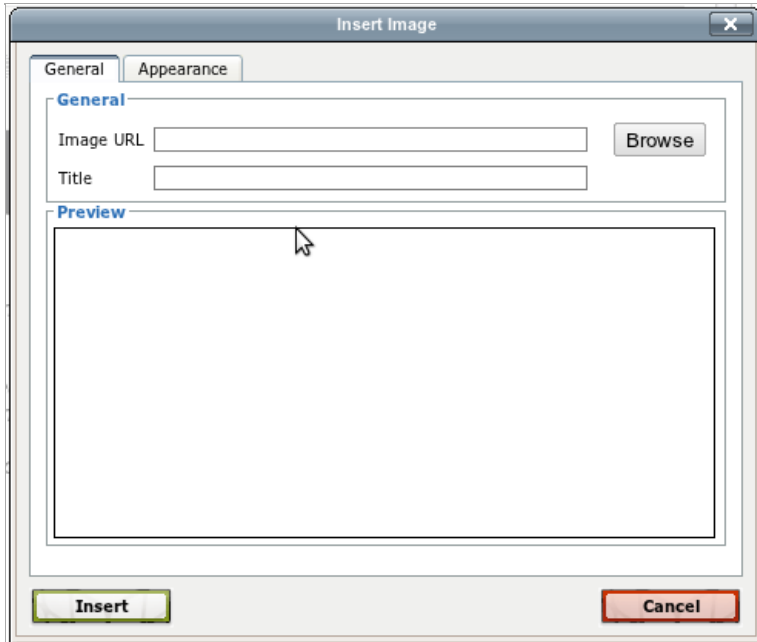
To change a Section title you must delete it by dragging it to the Hold Area and add another Section with the correct name.

# 13. ADDING IMAGES

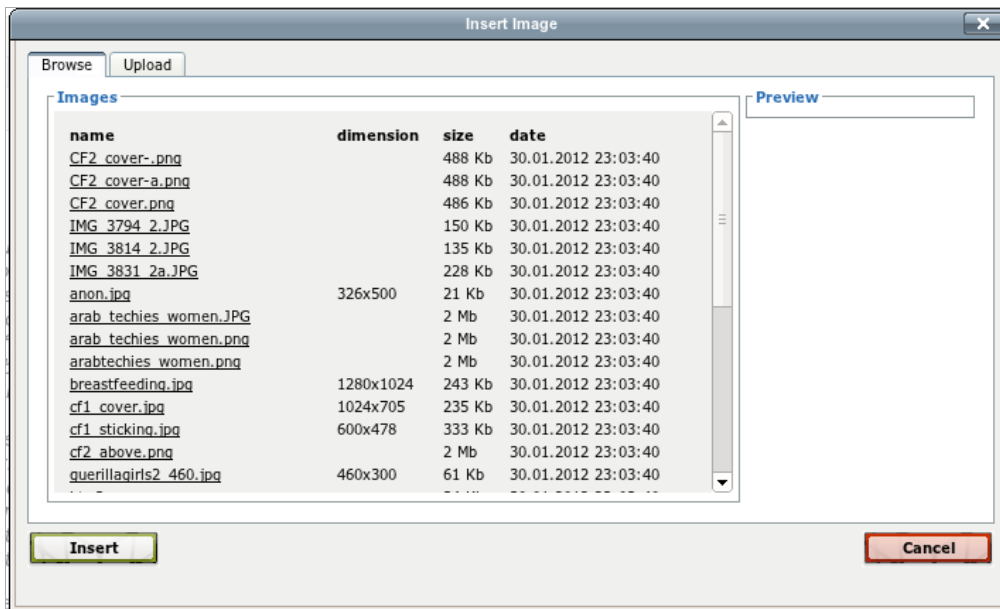
When you want to add an image to a chapter you are editing, first locate your cursor where you want the image to appear in the text, and then click the **Insert New Image** icon in the editing toolbar.



When the Insert Image window opens.



Click Browse to add a new image.



**Browse tab:** The Images tab lists all the images currently uploaded to your book. Click on an image name in the list and it will display a preview for you in the panel on the right. If this is the image you want to add to your chapter, click **Insert**.

**Upload tab:** If the image you want to insert has not yet been uploaded to Booktype, click the **Upload** tab. Click the **Browse** button to opens the regular file browsing window for your computer. Find the image you want, click on **Open**, and then **Upload**.

Once the image has been uploaded, the dialog will automatically switch to the **Browse** tab, from which you can select the image you want into your chapter and click **Insert**.

When the image has been placed on the page, you can right-click on it and select **Insert/Edit Image** to bring up a dialog which will enable you to fine-tune many properties of the image including alignment, dimensions, and spacing from text.



# 14. SETTINGS

From the **Settings** tab in the edit interface, you can manage the settings of your book.

## Settings

Manage the settings of your book.

### Language

This book is written in:

English

Right to left text

### License

This book is licensed with:

Creative Commons Attribution-NonCommercial-ShareAlike

[Read full text of the license](#)

### Roles

### Chapter status

Available statuses: *new, needs content, completed, to be proofed*

### Permissions and visibility

This book can be edited by:

admins and editors

## LANGUAGE

To change the language in which your book is being written, select the language that your book is written in from the dropdown menu (if available) and click the **Set new language** button.

## LICENSE

All books created using Booktype will have a copyright license attached. The dropdown menu contains a selection of frequently used copyright licenses. Select your chosen license from these and click **Set new license** to save the setting. If you would like to check the details of a particular license, select it from the dropdown menu and click **Read full text of the license**. A pop-up window will open containing a human-readable summary of the license, or the full text, depending on the license selected.

Users with administrator privileges who have access to the **Control Center** can edit the list of licenses which will be available in this dropdown menu. See the chapter *Control Center* for details.

You can also **Manage copyright attribution** for your book; this will open a pop-up window showing all of the contributors to your book, and if you want to exclude someone from attribution you can move their name to the "excluded" list.

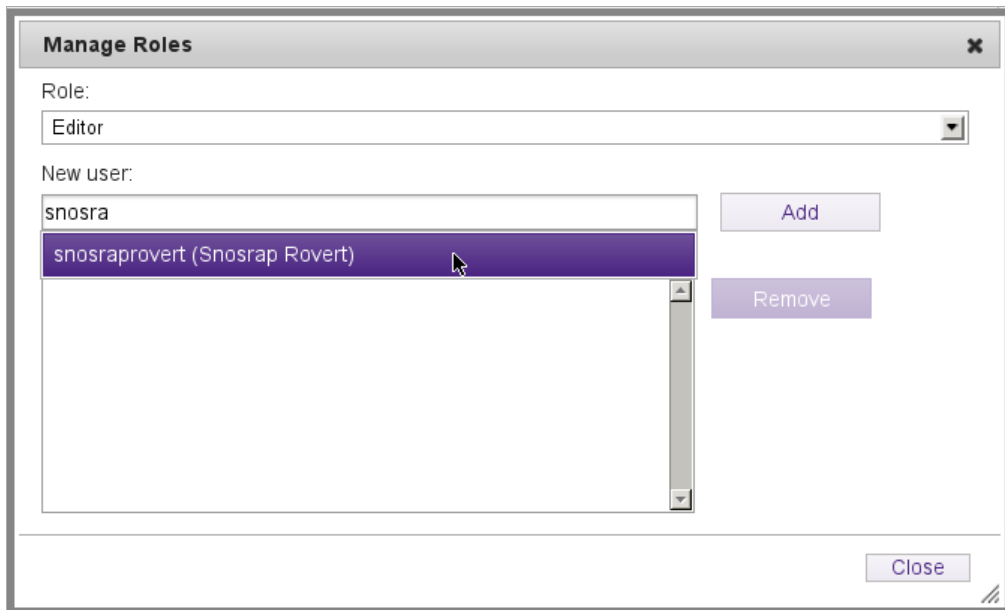
## ROLES

Click the button **Manage roles** to open a pop-up window where you can add collaborators and assign different roles to them.

To add a new contributor (note: the new contributor must first create a Booktype account):

1. From the dropdown menu, select the role you wish to give the new contributor.

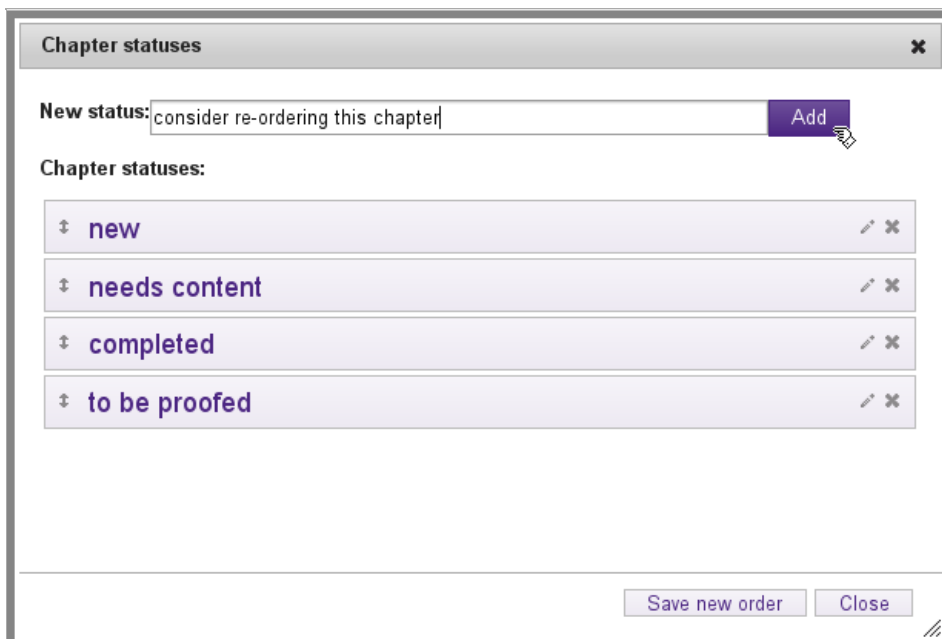
2. In the input field under "New user:", begin typing the username you wish to add, then select that user from the dropdown menu that appears.
3. Click **Add**.



To remove a contributor from an assigned role, select his or her role from the dropdown menu, click on the username in the list, and click **Remove**.

## CHAPTER STATUS

Click the **Manage chapter status** button to edit the statuses that are available for assigning to chapters. By default the chapter statuses are: 'new', 'needs content', 'completed', and 'to be proofed'. You can delete existing statuses, add new ones, and re-order them using drag and drop.



Your redefined chapter statuses will then be available from the status link at the right-hand end of each chapter's bar in the **Chapters** tab.

## PERMISSIONS AND VISIBILITY

From the dropdown menu, select who you want to be able to edit the book, then click **Set permissions**.

# 15. PUBLISHING

## PUBLISHING A BOOK

Once a book is ready from the Book page, click on the **Publish** tab.

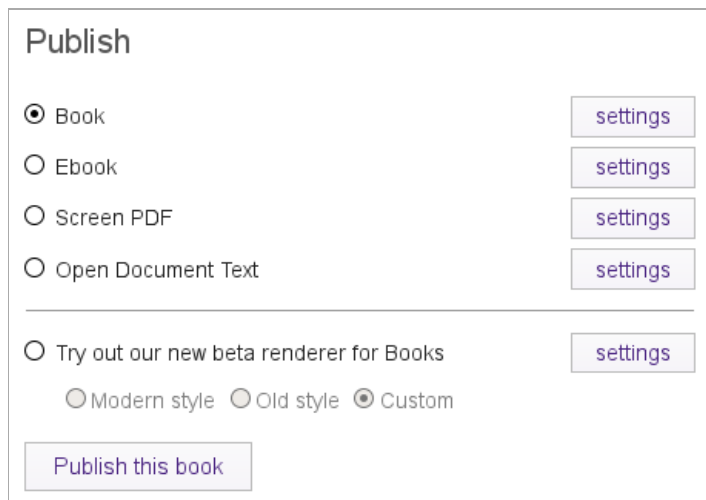
If you are happy with just the standard Booktype look and feel for your book do the following:

1. Choose the output type from the list
2. Click the **Publish this book** button

Booktype will create the favoured book type, and when finished will display a link to the book.

## FORMATS

Booktype can publish to several output formats. If you do not see the one you want listed then Booktype can be extended to include it, since it is free and open source software.



The screenshot shows a 'Publish' section with the following options:

- Book [settings](#)
- Ebook [settings](#)
- Screen PDF [settings](#)
- Open Document Text [settings](#)

---

Try out our new beta renderer for Books [settings](#)

Modern style  Old style  Custom

[Publish this book](#)

Let's look at the current formats available:

**Book:** Used for the creation of printed books, the book (PDF) file can be uploaded to a print on demand service or even sent to a local printer for printing of a standard bound book. It can also be used for printing a single copy of a book from a domestic printer.

**Ebook:** An ebook (or e-book) is an electronic book. Booktype can generate several different types of e-books for reading on devices like the Kindle, Nook, Sony Reader and iPad.

**Screen PDF:** This type of output is a PDF formatted to be read on screen. It can be linked from a webpage, uploaded to various PDF reading sites, or downloaded for reading.

**Open Document Text (.odt):** This outputs to OpenDocument Text, an ISO standard XML word-processing format which can be opened and edited in LibreOffice, OpenOffice.org and other word processors.

**Beta renderer for Books:** You may if you wish try out Booktype's new rendering engine for printed books. This is still in development. It offers options for modern or old styles, plus a custom option which allows you to set custom CSS.

Whichever format you choose, you can click the **Settings** button next to it to check that your book size is set correctly. You can either choose from a selection of standard sizes or set a custom width and height. You will also have the opportunity to change font settings, select your book's cover images, change pagebreak settings, and various more advanced options including setting custom CSS and editing Booktype's standard CSS. Click the **Submit** button to save your settings.

Booktype gives you an incredible amount of power to customise each output format. For more information read the advanced sections of this manual.

## EXPORTING TO BOOKTYPE ZIP ARCHIVE

Booktype also provides a method of exporting your book to a Booktype zip archive, which is useful mainly for purposes of backing up and restoring the book in case of accidental deletion or data loss on the server.

The Booktype zip archive contains an HTML file for each chapter, all of the images used in the book, and a JSON file to tell Booktype how to reassemble the book.

There isn't yet a graphical way of exporting a Booktype zip archive. You will need to do a relatively simple hack in your web browser, as follows.

Navigate to **My Dashboard** and then to the **My Books** tab. In the list of your books, click on the title of the book you want to export. The URL displayed in your web browser's address bar will look something like this:

A screenshot of a web browser address bar. The address bar contains the text "http://myusername.booktype.pro/my-book/". The text is in a standard sans-serif font, and the address bar has a light gray background with a small icon on the left.

This above example shows what the URL would look like for an author with an account on Booktype Pro called 'myusername' wanting to export a book entitled 'My Book'.

Here comes the hack. Click into the URL so that your cursor is positioned after the slash following the server name and before the title of the book. Type:

export/

Next, move your cursor so that it is positioned after the final slash following the name of the book. Once again type:

export/

In this example, the URL should now read:

http://myusername.booktype.pro/export/my-book/export/

With your cursor still in your web browser's address bar, press enter. Booktype will create the required zip archive and you will be asked to save it on your computer.

Users of Booktype Pro with zip archives which they would like to restore should seek assistance via the support email address or the Booktype Pro forum. If you are using Booktype on your own server, send the zip archive to your administrator, who will be able to use the bookimport commandline tool to restore your book, as detailed in the advanced chapter *Command Line*.

# **GROUPS**

**16. CREATING A GROUP**

**17. JOINING A GROUP**

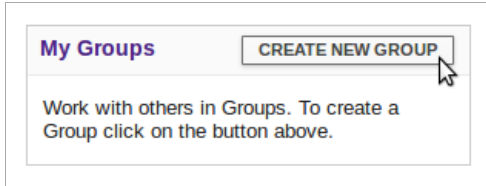
**18. ADDING A BOOK TO A GROUP**

# 16. CREATING A GROUP

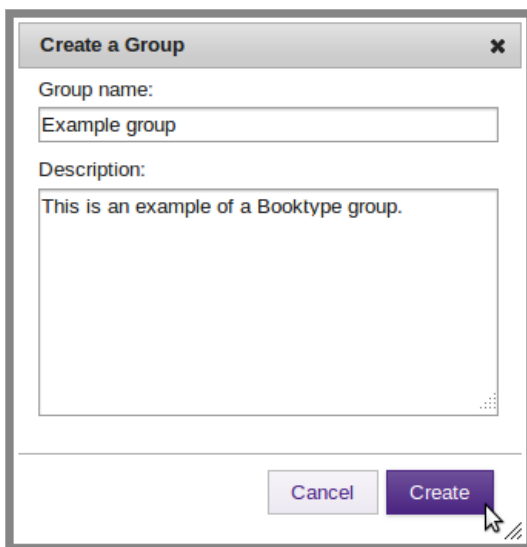
Groups are intended to bring people together to collaborate on books that share a common theme or interest. Click on **Groups** in the menu to see a list of existing groups and their descriptions.

If the group you want to join isn't there, you can start a group of your very own (see the chapter "Joining a Group" if you wish to join an existing group).

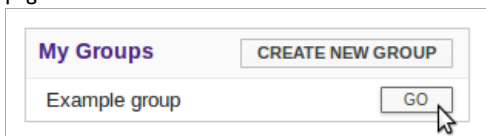
1. Go to your **Dashboard**. Once the page loads you will see the **CREATE NEW GROUP** button. Click on this.



2. A dialog box will appear. In the **Group name** box, type in a name for your group and then type in a brief description in the **Description** box.



3. Finally, click on the **Create** button at the bottom of the dialog. Your new group will be added to the list on your **My Groups** page and it will appear in the list of Groups visible to everyone. Click on its name or the **GO** button to take you to the group page.



# 17. JOINING A GROUP

After joining Booktype you may want to jump right in and create your own book, or you might wish to find and work with others on a book. For this reason, Booktype has groups to bring people together to create books that share a common theme or interest.

## TO JOIN A GROUP

1. Click on **Groups** in the menu
2. Find the group you want to join in and click on it
3. On the Group page click on the **JOIN THIS GROUP** button
4. You are added to the group and will see your name appear under the **Members** tab.

## REMOVING YOURSELF FROM A GROUP

At some point you may want to remove yourself from a group.

1. Go to your Dashboard and click on the link to the Group.
2. On the Group page click on **Leave this group**. You will be removed from the group and your name will disappear from the **Members** list.

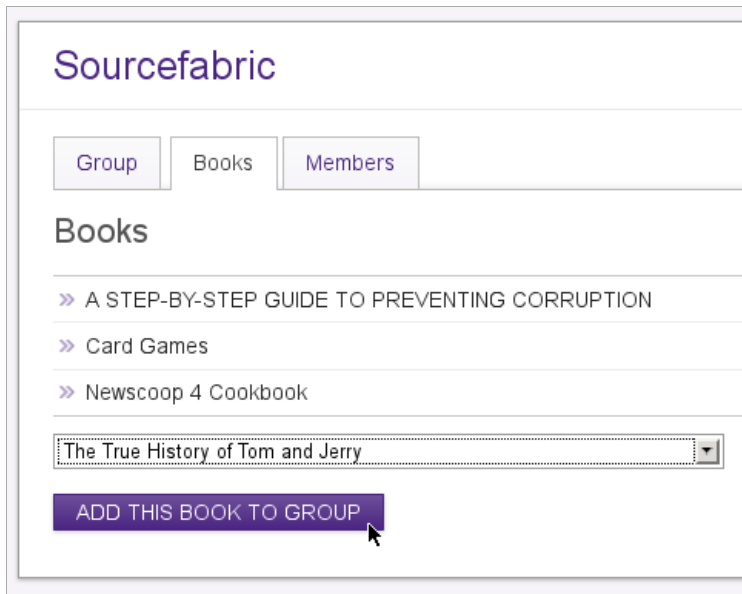
# 18. ADDING A BOOK TO A GROUP

Once you have created or imported a book into Booktype, it will sit in the Books list on your user page. If you are a member of a Group, you may want one of your books in the Group's list of books as well.

Note that a book can only belong to one group at a time.

To add a book you have created or imported to a group:

1. From your Dashboard, click on the link to the Group you want to add your book to in the **My Groups** list.
2. On the Group page under the **Books** tab you will see a drop-down list containing the titles of books that you have either imported or created.
3. Select the book you want to add to the Group.
4. Click **ADD THIS BOOK TO GROUP**. Your book now appears under the Books list on the Group page.



## REMOVING A BOOK FROM A GROUP

At some point you may want to remove a book from a Group. On the Group's page under the **Books** tab you will see a **remove** link next to your book. Click on the link and your book will disappear from the list.



# PEOPLE

## 19. COMMUNICATION

# 19. COMMUNICATION

When you are collaborating on a book, communication is a vital part of the process, whether you are working in a book sprint, taking your time on more long-term book generation, working locally in the same physical space, or remotely online. These situations have different requirements and harmonising these into one system is where the Booktype team has done a lot of real world research. Booktype includes tools such as real time edit notifications to see who is editing what at this moment, a real time chat (web / IRC gateway), system level notifications, chapter status markers, messaging tools, book progress indicators, work flow tools, and live user status listings.

The screenshot shows the Booktype interface. On the left is a table of contents with chapters and their status:

Introduction		
Anonymous	AdamHyde	not published
On the Invitation	EDIT VIEW	published
How This Book is Written	EEisenstein	imported
Background Concepts		
A Brief History of Collaboration	EDIT VIEW	imported
Assumptions	EDIT VIEW	imported
Social Creativity	EDIT VIEW	imported
Open Relationships	EDIT VIEW	imported

On the right is a chat window with the following messages:

AdamHyde: yes, i thought so too  
EEisenstein: it wasn't long wenough either  
EEisenstein: there were too many typos at first but Jan cleaned them up well  
AdamHyde: yeah, hes a wiz with typo  
INFO User AdamHyde has changed status of chapter "On the Invitation" to "published".  
INFO User AdamHyde has changed status of chapter "Anonymous" to "not published".

Below the chat is a section titled "Currently editing" with two entries: AdamHyde and EEisenstein.

## REAL TIME EDIT NOTIFICATIONS

When someone else enters the book's Edit page while you are busy editing a chapter, instead of the usual **EDIT** and **VIEW** links for that chapter in the table of contents they will see your username outlined in red. This notification happens in real time; if you are looking at the overview screen when someone else clicks the edit link for one of its chapters, you will see the edit button change to their user name.

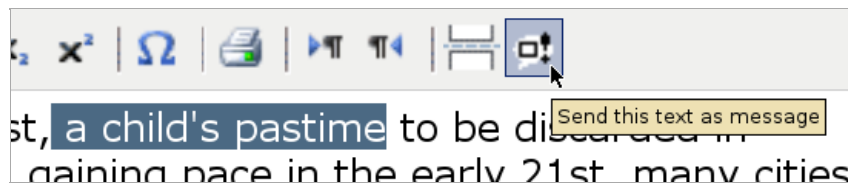
## MESSAGING

It is possible to message other people in Booktype using the messaging services.

The screenshot shows the Booktype messaging interface. At the top is a text input field containing "@Johan| can you check this?". Below the input field are two buttons: "Attach file" and "Add Snippet". Below these is a rich text editor with a text area containing the text "Booktype can be used as an out-of-the-box community platform to enable contributors to create profiles, join groups, watch books, chat live, post status messages and". Below the text area is a toolbar with icons for bold, italic, underline, text color, link, unlink, list, and list group. Below the toolbar is a text input field labeled "Optional snippet context URL:". At the bottom right is a "Share" button.

Messaging works like any short message service (such as Status.net or Twitter). To message someone enter @ followed by their username. To message a group use ! followed by the group name. Tags (#) are also supported. It is also possible to follow people, groups and tags.

Messaging in Booktype is not designed to be 'just' for fun (although that is important!) but it is integrated into a collaborative workflow. From the editor it is possible to highlight text and click on the **Send this text as message** icon in the advanced editing toolbar and that text is copied into the message.



That means you can send messages with text snippets or images to others for proof reading or checking, translation etc.

Additionally when messaging is used this way an additional 'context URL' is added which is included in the message. Clicking on this URL directs the recipient to the chapter from which the content was sent.

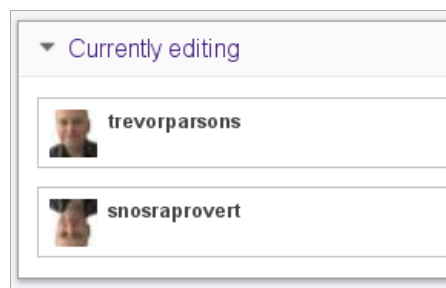
## REAL TIME CHAT

Upon entering a book's Editing page you will see a chat box for that book. The Chat is visible for the duration of the time you are editing the book, regardless of which chapter you are working on. Anyone else editing the book also has the chat box and you are able to communicate with them by typing directly into the text field under the chat box. This feature is very useful for communication with remote participants in Book Sprints as well as any situation where contributors to a book are working on it simultaneously.

Other information is also communicated through the Chat box. When a contributor enters the book editing screen a JOINED marker is displayed along with their name in the Chat box. So anyone already editing a book can see that someone else has joined them in editing mode and they can start communicating.

## LIVE CONTRIBUTOR LISTING

Below the chat box is a **Currently editing** panel which lists all people currently working on the book.



## SYSTEM LEVEL NOTIFICATION

System Level Notifications are generated when the following actions are performed:

- When a user saves a chapter
- When a user creates a new chapter
- When a user renames a chapter
- When a user alters the status of a chapter
- When a user creates a new section
- When a book is being published
- When a user saves a book's notes

Booktype generates and displays the messages in two ways: using the **Chat Box** and using the **History Tab** in the Editing Page.

## CHAT BOX

When one of the above actions is performed the Chat box displays an **INFO** marker and brief description outlining what has taken place. This notification is extremely useful where several participants are collaborating on a book simultaneously. Each participant is kept up to date of others' progress and can instantly reply to any notifications using the Chat Box.

## HISTORY TAB

The **History tab** sits next to the **Images and Files** tab in the book editing page. Clicking the History tab loads up a list of all the edits that have been made to the book. Every time one of the above actions is performed, a new item is added to the History tab.

The History Tab is divided into 3 columns: **action**, **user** and **time**. The **action** column lists the type of action that has taken place and if necessary it includes extra detail regarding the action. For example if the action recorded is **create** or **save** then the detail will list the name of the chapter that was created or saved. The **user** column lists the Booktype user who has performed the action and the date and time of the action is recorded in the **time** column.

To see more detail a user is able to click on the underlined chapter name in the action column which loads a history page for that particular chapter.

If an edit to a chapter has been very minor, for example a spelling correction, the author has the option to prevent a history record from being generated when the chapter is saved. This is carried out using the **Minor change, don't notify** tick box at the bottom of the **Chapter Editing panel**. Placing a tick in the box will prevent a history record from being generated when the chapter is saved.

An author also has the ability to add comments to the history record using three text boxes below the **Minor change, don't notify** tick box. The top box is a **general comment box**, followed by an **Author** text box, where the Author has the option of entering their name. The final text box is an **Author comment** box where the author is able to make another note. Comments entered into any of these text boxes will be added to a history record when the chapter is saved.

## CHAPTER HISTORY

The history tab not only lets you see the changes that have happened to the book but it also allows you to view the changes that have happened to individual chapters. Clicking on a chapter's name in the action column takes you to a chapter history display. Here you will see a list of all the edits made to a chapter from its first creation down to the most recent revision. The Chapter History lists the **revision** numbers with the most recent revision at the top, it also includes the **user** who edited each revision, the **time and date** the revision was saved and also any **comments** made by the author in the **general comment box** mentioned above.

Using the **compare** column on the left you can review the differences between any two revisions. Simply select the left radio button for one chapter and the right radio button for the other chapter you want to compare, then click on the **Compare revisions** button to see the differences between the two chapters.

The records in the history tab can be very useful for working on a book over a long period of time, when contributing authors are often not logged into Booktype at the same time. It can display what edits other authors have contributed since the last time a participant logged on and help them to decide which areas to work on. This is especially true if the author has added comments detailing what they did and what further work they feel is needed in order to complete the chapter they have contributed to.

## CHAPTER STATUS MARKERS

In the Chapters tab of the book editing page, on the right hand side of each chapter bar there is a **status marker** for the chapter.

This can be manually altered depending on what stage the chapter is up to. Clicking on the marker reveals a drop-down list. Click on the list and select the status required for the chapter. The chapter's marker is changed to the new status.

When working on a book that has been created from scratch, the default marker is **new**. For a book that has been imported from another source, the default status for a chapter is **imported**, even for new chapters that have been created from scratch after the import.

## BOOK NOTES

A book's notes are where contributors can discuss and add comments about the book as a whole. Anything can be added to a book's notes including a suggested structure or outline for a book, which areas need urgent attention, and even suggestions for a book's direction. Book Notes are accessed through the Notes tab on the book editing page. Once there, you have a free text field to add as much or as little as you want. When you have added your notes, click **Save the notes** at the bottom of the Notes tab to save your changes, an INFO notification will be displayed in the Chat box saying that the notes have been saved.

# DESIGN

- 20. FORMLESS CONTENT**
- 21. ADDING CSS**
- 22. LEARN BY SHARING**
- 23. TABLE OF CONTENTS STYLE**
- 24. COPYRIGHT**
- 25. SECTIONS**
- 26. FRONT PAGE**
- 27. FOOTERS**
- 28. SOME TRICKS**

# 20. FORMLESS CONTENT

There is a lot of interesting stuff happening to the page right now. The page is changing in so many ways – time based media is making its way into book pages, reactive content, scrollable space, and a multitude of differing display devices make designing pages pretty hard work these days. How to design for so many possibilities? How to understand so many possibilities?

Craig Mod of flipboard makes a very compelling argument for two forms of page: formless and definite content, in an article he wrote for *Book: A Futurists Manifesto* - the first book to be produced by PressBooks. Craig's argument in a nutshell and in his own words is:

the **key difference** between Formless and Definite Content is the interaction between the content and the page. Formless Content doesn't see the page or its boundaries; Definite Content is not only aware of the page, but embraces it. It edits, shifts, and resizes itself to fit the page [...] Put very simply, Formless Content is unaware of the container. Definite Content embraces the container as a canvas.

Craig argues that most book content we know is formless – the text can reflow into other containers without affecting the meaning. Its a really well argued position and one that is in tension to the current design methodologies of book designers today. Book designers are taught to design contained space – books are a very definite context in which they work. Desktop Publishing Applications are built to meet this methodology. Pixel perfect manipulation within a strictly contained space. If the designed digital article does not exactly match the printed artefact then something went wrong. A lot of energy has gone into this process.

Formless design principles are uneasy to consider for traditional book designers – how can you design for a page that does not yet know its container? It is literally like asking a book designer to design a book without telling them the page dimensions.

As it happens web designers have been thinking about page design too. For a long time now web designers have made pages that embraces differing containers – they have been working, at least in part, with formless content.

What is missing however are good tools for taking the web designers aptitude for working with formless content to enable them to produce books. A good tool set for designing formless books should not work with a constrained page dimensions. It is tempting, for example, to think of working with a design environment with constrained page-like artefacts - think of Google Docs as an example. Could something like Google Docs with its digital, scrollable, yet fixed page size be a good starting point for some kind of design tool? Place layout and typographical controls on top of Google Docs and do we have the next book design environment?

I don't think so, because it is exactly the kind of idea that is blinded by the media of the past and cannot accept that things have changed. We must design tools that enable book design for formless content. What those tools look like is a very interesting question and one which Aleksandar Erkalović (Booktype lead developer) and I have been working on with students (Hannes Bernard and Aiwen Yin) from the Sandberg Institute in Amsterdam.

Our argument is that the design of formless content is really a partially constrained environment since elements within the page have some kind of relationship to each other. This is an argument web designers are familiar with when using design tools like position:relative – a rule which sets a relative position relationships between objects. Relationships can be constrained or shaped by rules which will be at least partially preserved when displayed in different contexts. The meaning is preserved by the relationship between the elements more than by their relationship to the constraints of a page.

This is the reasoning behind Cascading Style Sheets – the design language of the web. It is rule based design and even partly conditional. It is possible to express conditions in CSS even though it is not done that often. A CSS rule such as :

```
h2+p {page-break-inside:avoid;}
```

is a conditional CSS rule which will apply the style only when a paragraph follows heading 2 (h2) element.

Web designers know this kind of thinking but book designers are going to have to let go of pixel perfect design and enjoy thinking and designing this way. It seems like a simple idea but it takes a lot to overcome legacy. The legacy is so strong that designers are pretending the issue does not exist. There are tools now appearing and sold as design environments for iPad books. They give near 1:1 page relationship between design environment and the final result. However we all know what happens to digital hardware – it changes. What is true now will not be true five years from now so the idea that an ebook is a contained space is very appealing to traditional book designers but it will be a short lived myth. iPads might keep the same form for five years, they might not, but they certainly will not keep it over the next five to ten years. Better to learn how to design in the new way than be fooled into thinking you can bring all the old methods to a new medium and get away with it for long.

Booktype works with formless content and design using CSS. We are working on a visual design environment to assist this process but for now CSS is added through the Settings in the Publish tab. Almost any CSS that you make yourself or find on the net can be applied to the books.

# 21. ADDING CSS

So, all outputs are controlled by CSS. That is because we use the Webkit browsing engine to render our PDF, with a few bells and whistles. Rule based design is something people have to get used to for contained page design, so I thoroughly recommend you experiment lots with this side of the production. We have not explored this enough as the potential far outreaches our resources.

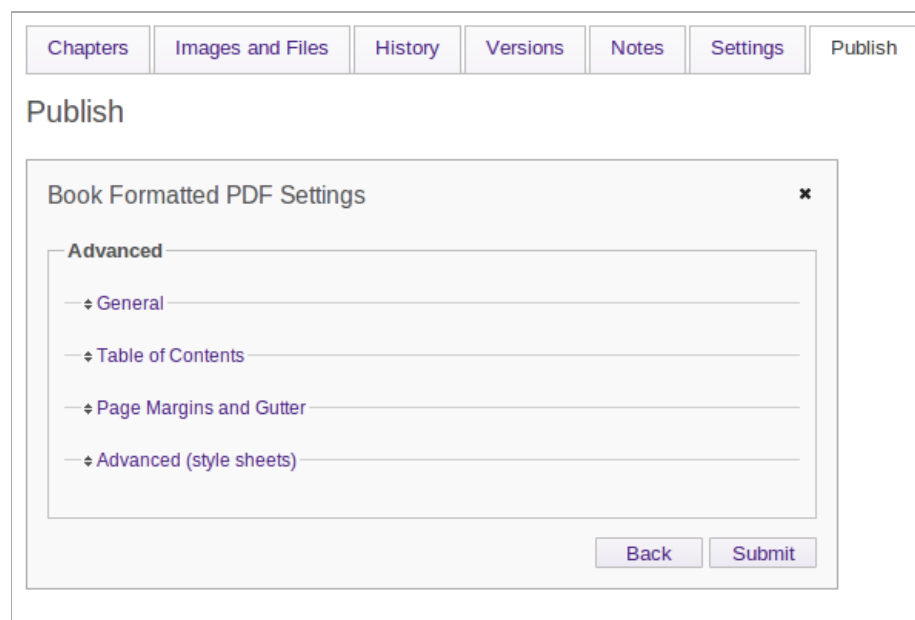
There are two parts to the CSS. The first is the usual styling of elements that you are probably familiar with from web design. Since we use Webkit (which is the browsing engine behind Safari and Chrome) just about any CSS you can apply to a webpage can be applied to elements in a book and in the same way.

To apply H1 use syntax like:

```
h1 { font-weight:bold; }
```

You can additionally use webfonts with @font-face but these will not be rendered in a paper book because PDF requires the fonts to be embedded. So the fonts must be stored on the server.

All CSS can be entered into the Wizard in the Publish tab for any edit page (\_edit), for any book. Each book has its own settings per user, per book, per format. So anything you try will not effect other users settings. The wizard can be opened by clicking on "Settings" and then you will see some options. Choose 'Settings' next to 'book' to format book formatted PDF with CSS. The most interesting screen for custom CSS is the last one - click on 'advanced - style sheets'.



You will see two boxes.

← Advanced (style sheets)

Your Custom CSS

Booktype CSS (be careful if changing)

```
.objavi-chapter{
  color: #000;
}

a {
  text-decoration:none;
  color:#000;
}

h1 .initial{
  color: #000;
}

.objavi-subsection{
```

Override ALL previous settings with custom CSS

Enter the CSS into the first box and make sure you select "Override ALL previous settings with custom CSS". Then try adding CSS, submitting the Wizard and click "Publish this book" to see the results.



# 22. LEARN BY SHARING

To understand the relationship between CSS and the final result there is no substitute for trial and error. Designers must first understand how a 'web native' technology — CSS — applies to page based media (books). This paradigm appears simple but it requires a slight re-alignment of how book designers think about designing books, and to do this designers must try the process and persevere until they succeed. After that initial success things become easier.

Probably the best way to start is to take an existing book and look at someone else's CSS, then change it and see what happens. Generating a PDF takes anywhere from half a minute to a few minutes so this is a pretty quick method for seeing how CSS effects the layout of the book. For experimenting visit the following page:

<http://collaborative-futures.org/>

At the bottom of this page you will find a link to the CSS used for the print version of the second edition of this book. You can see the CSS states:

```
/* Main CSS File: */
@import url("http://collaborative-futures.org/material/styles.css");
/* Uncomment based on the book size you export: */
/* A5 */
/* @import url("http://collaborative-futures.org/material/size/a5-hacks.css"); */
/* 5.5"x8.5" */
/* @import url("http://collaborative-futures.org/material/size/5.5x8.5-hacks.css");*/
```

This is CSS syntax that imports the 'real' CSS used which can be found here:

<http://collaborative-futures.org/material/styles.css>

Copy this CSS, change it, and enter it in the CSS text field of Booktype, then try exporting the book again. Experiment with changing the CSS and see what happens.

The following are some examples you may wish to try out.

## LIST EXAMPLE

```
ol { font-style:italic; font-family:Georgia, Times, serif; font-size:24px; color:grey; }
ol li p { padding:8px; font-style:normal; color:black; border-left: 1px solid #999; }
ol li p em { display:block; }
```

## DEFINITION LIST EXAMPLE

```
dl {
  overflow: hidden;
  padding: 0;
}
dl dt {
  clear: both;
  float: left;
  padding-right: 10px;
  width: 160px;
}
dl dd {
  margin-left: 170px;
  padding-left: 20px;
}

dl dt {
  padding-bottom: 5px;
  padding-top: 5px;
  position: relative;
  text-transform: uppercase;
}
dl dd {
  border-color: #DDDDDD;
  border-style: solid;
  border-width: 0 0 0 1px;
  padding-bottom: 5px;
  padding-top: 5px;
}
dl dt:before {
  border-top: 1px solid #DDDDDD;
  content: "";
  position: absolute;
  right: -15px;
  top: 0;
  width: 30px;
}
dl dt:after {
  background: none repeat scroll 0 0 #FFFFFF;
  border: 1px solid #DDDDDD;
  border-radius: 6px 6px 6px 6px;
  content: "";
  height: 5px;
  position: absolute;
  right: -3px;
  top: -3px;
  width: 5px;
}
dl dt:first-child:before, dl.definition dt:first-child:after {
  display: none;
}
```

## TABLE EXAMPLES

First example:

```
table
{
  font-family: "Lucida Sans Unicode", "Lucida Grande", Sans-Serif;
  font-size: 12px;
  margin: 45px;
  width: 480px;
  text-align: left;
  border-collapse: collapse;
}
table th
{
  font-size: 13px;
  font-weight: normal;
  padding: 8px;
  background: #b9c9fe;
  border-top: 4px solid #aabcfe;
  border-bottom: 1px solid #fff;
  color: #039;
}
table td
{
  padding: 8px;
  background: #e8edff;
  border-bottom: 1px solid #fff;
  color: #669;
  border-top: 1px solid transparent;
}
table tr:hover td
{
  background: #d0dafd;
  color: #339;
}
```

Second example:

```
table
{
  font-family: "Lucida Sans Unicode", "Lucida Grande", Sans-Serif;
  font-size: 12px;
  background: #fff;
  margin: 45px;
  width: 480px;
  border-collapse: collapse;
  text-align: left;
}
table th
{
  font-size: 14px;
  font-weight: normal;
  color: #039;
  padding: 10px 8px;
  border-bottom: 2px solid #6678b1;
}
table td
{
  color: #669;
  padding: 9px 8px 0px 8px;
}
table tbody tr:hover td
{
  color: #009;
}
```

## IMAGE EXAMPLE

```
IMG { -webkit-border-radius: 5px; border-radius: 5px; }
```

## HEADING EXAMPLES

```
h1
{
  font-size: 36px;
  border-top: 1px solid #333333;
  border-bottom: 1px solid #333333;
  line-height: 1em;
  font-family: 'Times New Roman';
}
```

or try this:

```
h1{
  font-family:Georgia,serif;
  color:#4E443C;
  font-variant: small-caps;
  text-transform: none;
  font-weight: 100;
  margin-bottom: 0;
}
```

## PARAGRAPH EXAMPLES

Example 1:

```
p {
  font-size: 1em;
  line-height: 1.25em;
  margin: 0;
  text-align: left;
}
p + p {
  text-indent: 2.5em;
}
p:first-letter {
  font-size: 3.5em;
  line-height: 1em;
  font-weight: 400;
  float: left;
  margin: 0 0.107em 0 0;
}
p:first-line {
  font-weight: 800;
}
p + p:first-letter {
  font-size: 1em;
  line-height: 1.25em;
  float: none;
  margin: 0;
}
```

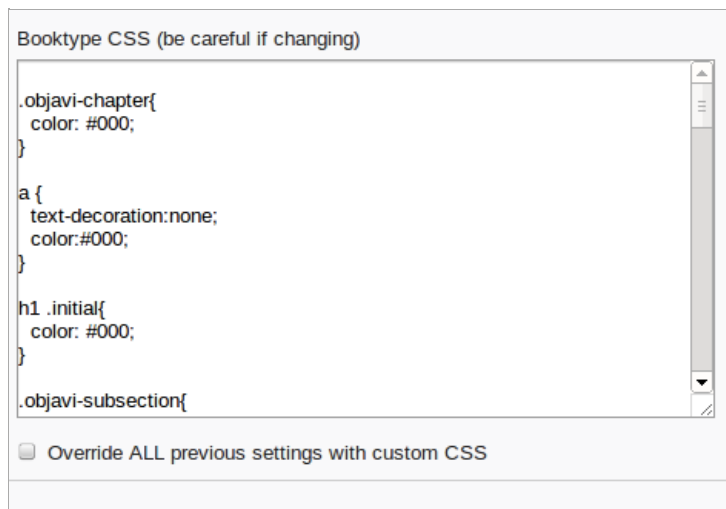
Example 2:

```
p {
font-size: 1em;
line-height: 1.25em;
margin: 0.625em 0;
text-align: justify;
}
p:first-letter {
font-size: 3.5em;
line-height: 1em;
}
p + p:first-letter {
font-size: 1em;
line-height: 1.25em;
}
```

There are other examples to be found online, probably the most comprehensive resource is [blog.booki.cc](http://blog.booki.cc). When it comes to your turn to create CSS for your own books I strongly recommend you share the CSS online so others can learn from you.

# 23. TABLE OF CONTENTS STYLE

You can also change the style of the Table of Contents at the front of the book. To do this you must open the Advanced CSS panel and look at the Booktype CSS field:



Here you can find a lot of CSS that defines some advanced items including the Table of Contents. If you scroll down this window you will find the ToC CSS:

```
/* TOC *****/
table {
float: none;
}

table.toc {
font-size: 1.1em;
width: 95%;
}

table.toc td{
vertical-align:top
padding-left: 0.5em;
}

td.chapter {
padding: 0 0.5em;
text-align: right;
}

table.toc td.pagenumber {
text-align: right;
vertical-align:bottom;
}

td.section {
padding-top: 1.1em;
font-weight: bold;
}
/* End TOC *****/
```

You can change any element here and it will have an effect on the look and feel of the Table of Contents.

# 24. COPYRIGHT

Copyright notices get attached in a class called 'copyright' e.g:

```
<div class="copyright">  
    <b>Published :</b> 2012-06-05 <br />  
    <b>License :</b> GPL <br />  
</div>
```

You can add extra information to this by the use of the CSS psuedo class 'after', e.g:

```
.copyright:after {  
    font-style: italic;  
    content: "First Published 1964";  
}
```

# 25. SECTIONS

Books in Booktype are separated into sections and chapters. A section is a collection of chapters. Sections have a page in the book formatted PDF which lists the chapters in that section. It is possible to hide these section pages and change the look and feel of them with CSS.

This can be done on a specific or universal level. To change the look and feel universally you need to change the following elements in the Booktype Only CSS field:

```
.objavi-subsection{
  display: block;
  page-break-before: always;
  /* page-break-after: always;*/
  text-transform: uppercase;
  font-size: 20pt;
}

body .objavi-subsection:first-child{
  page-break-before: avoid;
}

.objavi-subsection .initial {
  font-size: 1em;
  color: #000;
}

.objavi-subsection-heading {
  font-size: 20pt;
  text-align: center;
  line-height: 300px;
  font-weight: normal;
}
```

If you wish to change each section individually you need to target each section with specific CSS. For example the following:

```
#section-1 .objavi-subsection-heading{
  background:#fff url(http://www.freedomfone.org/booki/images/01_whatiff.png) no-repeat center center;
}
```

will give the first section page an image. You will also need to hide the text in this case, so apply this:

```
.objavi-subsection .initial {
  color: #000;
  display:none;
}
```

You have to be a little careful to make sure that each section gets the right image if you try this approach, but since it doesn't take long to change the code and test then it's easy to fix if you get it wrong.

# 26. FRONT PAGE

The style of the front page text (which just displays the title of the book) can be altered with the following CSS (found in Booktype ONLY CSS panel):

```
h1.frontpage{
  page-break-after:always;
  margin-top:70%;
  font-size: 20pt;
  text-align: center;
  page-break-before: avoid;
  font-weight: normal;
}
```

You can add additional text such as a byline with the following:

```
h1.frontpage:after
{
  content:"by Joe Smog";
}
```



# 27. FOOTERS

Footers can be styled with the following code, for example (also found in the Booktype only CSS Panel):

```
#right-footer {  
  text-align: right;  
}  
  
#left-footer {  
  text-align: left;  
}
```

It is possible to use other variables, as described in the wkhtmltopdf manual.

# 28. SOME TRICKS

There are many tricks to working with CSS, and some tricks specific to books.

The best thing to know is that you can actually test all of the tricks out on a local machine with a browser and see the results. If you publish a book with Booktype, you will get a link to the rendered PDF which looks something like this:

<http://objavi.booki.cc/books/awebpageisabook-en-2012.03.25-05.56.42.pdf>

This gives you some interesting information that you may not yet know about! Copy and paste the URL of your book, cut off everything after "objavi.booki.cc" and replace it with /tmp/ e.g:

<http://objavi.booki.cc/tmp/>

You will see a list of directories with books. Search for your book (use ctrl-f and search for the last part of the URL without the suffix, e.g. search for awebpageisabook-en-2012.03.25-05.56.42). You will find a directory which you can open and you will see contents like this:

## Index of /tmp/awebpageisabook-en-

<u>Name</u>	<u>Last modified</u>	<u>Size</u>	<u>Description</u>
 <a href="#">Parent Directory</a>		-	
 <a href="#">Xauthority</a>	25-Mar-2012 05:57	0	
 <a href="#">body.html</a>	25-Mar-2012 05:56	215K	
 <a href="#">body.pdf</a>	25-Mar-2012 05:56	478K	
 <a href="#">final.pdf.pre-embed.pdf</a>	25-Mar-2012 05:57	468K	
 <a href="#">footer-LTR.html</a>	25-Mar-2012 05:56	1.2K	
 <a href="#">objavi.css</a>	25-Mar-2012 05:56	2.2K	
 <a href="#">outline.txt</a>	25-Mar-2012 05:56	5.8K	
 <a href="#">preamble.html</a>	25-Mar-2012 05:56	5.5K	
 <a href="#">preamble.pdf</a>	25-Mar-2012 05:56	27K	
 <a href="#">raw.html</a>	25-Mar-2012 05:56	211K	
 <a href="#">static/</a>	25-Mar-2012 05:56	-	
 <a href="#">tail.html</a>	25-Mar-2012 05:56	733	
 <a href="#">tail.pdf</a>	25-Mar-2012 05:56	15K	

Apache/2.2.16 (Debian) Server at objavi.booki.cc Port 80

If you download the *body.html* file and the *static* directory you will be able to change the CSS files and see the results in your browser. Body.html contains all the information for your book including sections but not the Table of Contents (this is added later). When you edit the CSS and get the version you want, you can copy and paste this into your Booktype Advanced CSS window.

## WHAT IF MY CSS DOESN'T SHOW UP?

Sometimes you apply a CSS rule and you do not see any change. There are two tricks for dealing with this. First use the CSS 'important' rule. This is an override rule which can be applied to any CSS rule and will force that rule to take precedence. Take for example the following:

```
h1{
    font-family:Georgia,serif ! important;
}
```

This will override any conflicting rules for h1.

The other trick to checking CSS for your book design is to open the body.html file as described above, change the CSS as needed and then install a dynamic CSS console like Firebug. This software is installed in your browser and it enables you to inspect and change CSS rules dynamically.

## CONDITIONAL RULES

It is not very well known, but CSS has some conditional rules. You can use the '+' symbol to combine elements and apply rules only when these two elements appear together. For example, you can do this:

```
h2+p {font-style:italic;}
```

This will give the first paragraph after any h2 heading an italic style.

## PSUEDO ELEMENTS

There are many elements that can be targeted in some special ways - like the first letter in a paragraph, for example. These are known as 'psuedo elements' in CSS jargon. For example, you could target the first letter of all paragraphs like this:

```
p:first-letter {  
font-size: 3.5em;  
line-height: 1em;  
font-weight: 400;  
float: left;  
margin: 0 0.107em 0 0;  
}
```

That effectively creates a 'drop cap' effect for paragraphs. If you wanted this to only be applied to the first paragraph of every page, you could use a conditional statement like the following:

```
h2+p:first-letter {  
font-size: 3.5em;  
line-height: 1em;  
font-weight: 400;  
float: left;  
margin: 0 0.107em 0 0;  
}
```

Pseudo elements exist for many interesting cases including lang, first line, after and others. For a full list of psuedo elements check the web page: [http://www.w3schools.com/Css/css\\_pseudo\\_elements.asp](http://www.w3schools.com/Css/css_pseudo_elements.asp)

## WEBKIT

The important thing to know is that Booktype uses Webkit to make PDF. That means any CSS tricks that Chrome or Safari can do, Booktype can do.

# **ADVANCED**

**29. COMMAND LINE**

**30. THEMING THE INTERFACE**

**31. LOCALIZING THE INTERFACE**

# 29. COMMAND LINE

This is some brief information on how to use the command line admin tools for Booktype. Using these tools you can export and import books and change the URLs and titles of books.

You can do a lot of damage with this, so be careful.

## TOOLS

```
django-admin.py help brokenlinks
django-admin.py help bookimport
django-admin.py help bookexport
django-admin.py help bookrename
```

## BROKENLINKS

```
brokenlinks - check links inside of book(s).
django-admin.py brokenlinks command-line my-book
django-admin.py brokenlinks --no-remote command_line
django-admin.py brokenlinks --ignore-url http://www.wikipedia.org/ command_line
```

## BOOKEXPORT

```
bookexport - exports book into booki-zip file. this is not real export, and it does not export historic data.
django-admin.py bookexport command-line
django-admin.py bookexport --output my-export.zip --book-version 2.2 command-line
```

## BOOKIMPORT

```
bookimport - imports new book from booki-zip file. you can import it
under new name also.
django-admin.py bookimport book.zip
django-admin.py bookimport --owner aerkalov book.zip
django-admin.py bookimport --new-book-title "New title for Command
line" book.zip
django-admin.py bookimport --new-book-title "New title for Command
line" --new-book-url commandline book.zip
```

## BOOKRENAME

```
bookrename - renames existing book.
django-admin.py bookrename --new-book-title "New title" command-line
django-admin.py bookrename --new-book-title "New title" --new-book-url commandline command-line
django-admin.py bookrename --owner aerkalov command-line
```

## NOTES

1. there is env.sh script in the root. you should read that with "./env.sh" before doing any work from the command line, and especially if trying to run any django management command. you should set it up (it sets pythonpath, path and some other things). when running django app, all this things are loaded trough wsgi script, but when using command line you should load it manually (or put it in your profile, and have it loaded every time. but this is not very smart). this is also place where you setup your DJANGO\_SETTINGS\_MODULE environment variable.
2. never run anything as root, or god forbid as your user account (or have things installed in your personal /home directory). if booktype is installed to be run as www-data user through apache, then everything must be run as that user. if you use root account, it will work, but it will also screw file permissions on your log files, on your attachment files and etc. also, running things with super user privilege is not very smart. if you go to booktype directory and you see more than one user in "ls -l" result list, you are doing it wrong.
3. django-admin.py and manage.py is result of not having defined DJANGO\_SETTINGS\_MODULE variable (and not having django/bin in your path). if you know what you are doing and what manage.py file you are running, it is ok to use it, but it is much smarter to be 100% sure with DJANGO\_SETTINGS\_MODULE and django-admin.py. if you have more then 2 installations on the same machine, DJANGO\_SETTINGS\_MODULE is sane way to work with them. and etc...etc...etc...

# 30. THEMING THE INTERFACE

As a web application, the appearance of Booktype can be themed in the same way that you might adjust the appearance of a dynamic web site, by editing templates and changing static files. Because a single Booktype server can host multiple instances, each instance can have its own unique theme. The following examples assume that the Booktype software has been downloaded to the `/usr/local/src/` directory on the server, and a Booktype instance has been installed in the `/var/www/mybooktype/` directory.

Default templates are found in the directories for the components of Booktype that they relate to. For example, the default templates for the front page that readers see when they arrive at a Booktype server are found in the `templates/portal/` directory:

```
/usr/local/src/Booktype/lib/booki/portal/templates/portal/
```

Under this `portal` directory there are a number of templates such as the `frontpage.html` file which determines the default appearance of the front page of each Booktype instance, as its name would suggest. This file can be copied to the custom templates directory of a specific instance, which in the example of an instance installed in `/var/www/mybooktype/` would be:

```
/var/www/mybooktype/templates/portal/
```

Default static files, such as CSS and image files, are found in a separate directory from templates:

```
/usr/local/src/Booktype/lib/booki/site_static/
```

The equivalent static files directory for a customized instance in `/var/www/mybooktype/` would be:

```
/var/www/mybooktype/static/
```

The different names of these directories mean that templates can make use of both default and customized static files, as required.

## MODIFYING THE FRONT PAGE

In the server's console, you could copy the `frontpage.html` file and open it for editing with **nano** using the commands:

```
cd /usr/local/src/Booktype/lib/booki/portal/templates/portal/  
sudo cp frontpage.html /var/www/mybooktype/templates/portal/  
cd /var/www/mybooktype/templates/portal/  
sudo nano frontpage.html
```

In the `<head>` element of that file, you can see the title of the page:

```
{% block header %}  
<title>Booktype</title>
```

Using the nano editor, these lines can be changed to read:

```
{% block header %}  
<title>FLOSS Manuals - Free Manuals for Free Software</title>
```

You can save the file by pressing **Ctrl+O** and exit the nano editor by pressing **Ctrl+X** on your keyboard.

Text within quotes following the word *trans* is a translatable string. For example, in the `<body>` element of the file you might see the string:

```
<h2>{% trans "Welcome to Booktype" %}</h2>
```

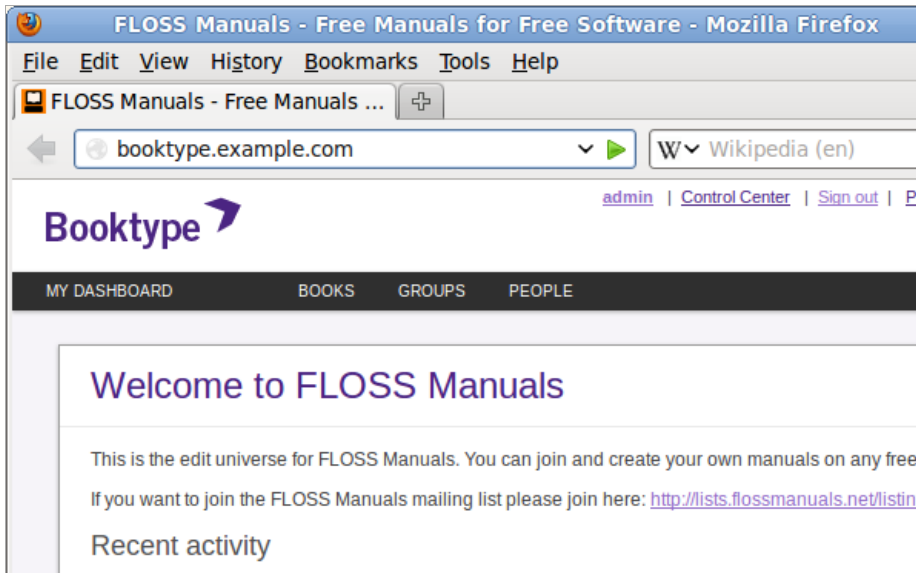
This can be changed to read:

```
<h2>{% trans "Welcome to FLOSS Manuals" %}</h2>
```

Additional HTML text can be added to the file as required, such as:

```
<p>This is the edit universe for FLOSS Manuals. You can join and create your own manuals on any free software.</p>
```

After saving the template file, refresh your web browser to see the change in the template.



## EDITING CSS STYLES

To customize page styles, copy one of the default CSS files, such as *booki.css*, to the *static/css/* directory of the Booktype instance, and open it in nano:

```
cd /usr/local/src/Booktype/lib/booki/site_static/css/
sudo cp booki.css /var/www/mybooktype/static/css/
cd /var/www/mybooktype/static/css/
sudo nano booki.css
```

You can then replace the default background colour with an image, by changing the first line of the *body* element:

```
body {
    background-color:#f6f4f9;
    font-family:Arial, Helvetica, sans-serif;
    font-size:12px;
    color: #444444;
    margin:0;
    padding:0;
}
```

to the filename of a suitable background image:

```
body {
    background-image: url('../images/background.png');
    font-family:Arial, Helvetica, sans-serif;
    font-size:12px;
    color: #444444;
    margin:0;
    padding:0;
}
```

and placing the *background.png* image in the */var/www/mybooktype/static/images/* directory. You may have to create this directory if it does not already exist, with the command:

```
sudo mkdir -p /var/www/mybooktype/static/images/
```

The background of the part of the front page which is above the user menu is controlled by the *.topbar* element:

```
.topbar {
    background-color:#fff;
    border:0;
    height:60px;
    text-align:right;
}
```

Further customized images, such as site logos, can also be placed in this directory. The name of the logo file is contained within the *.logo* element:

```
.logo a {
    background: url('../images/logo.png') no-repeat transparent;
    display:block;
    height: 40px;
    margin: 0;
    width: 160px;
}
```

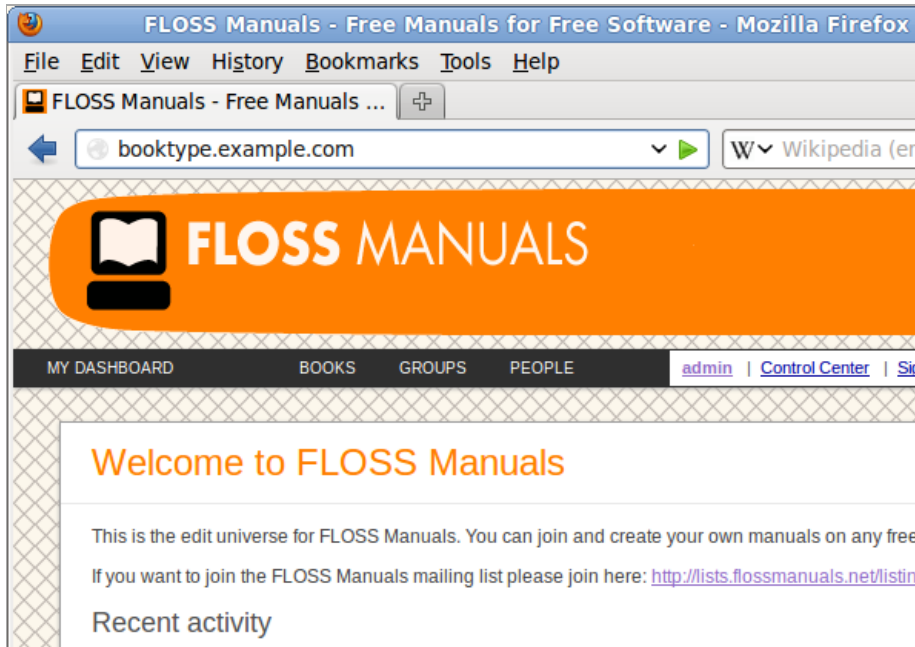
Finally, you may need to adjust the first part of the *base.html* template to point to your customized CSS file. Start by copying the default file into the customized instance and opening the new file for editing:

```
cd /usr/local/src/Booktype/lib/booki/portal/templates/
sudo cp base.html /var/www/mybooktype/templates/
sudo nano /var/www/mybooktype/templates/base.html
```

Then change the path for the booki.css file from the default *site\_static/css/* directory to the *static/css/* directory which serves the custom files for each Booktype instance.

```
{% load i18n messaging_tags booki_tags %}
<!DOCTYPE HTML>
<html>
<head>
  <link type="text/css" href="{{ request.META.SCRIPT_NAME }}/static/css/booki.css" rel="stylesheet" >
```

Saving the file and refreshing the page will enable you to see the new styles and graphics.



## CREATING NEW TEMPLATE FILES

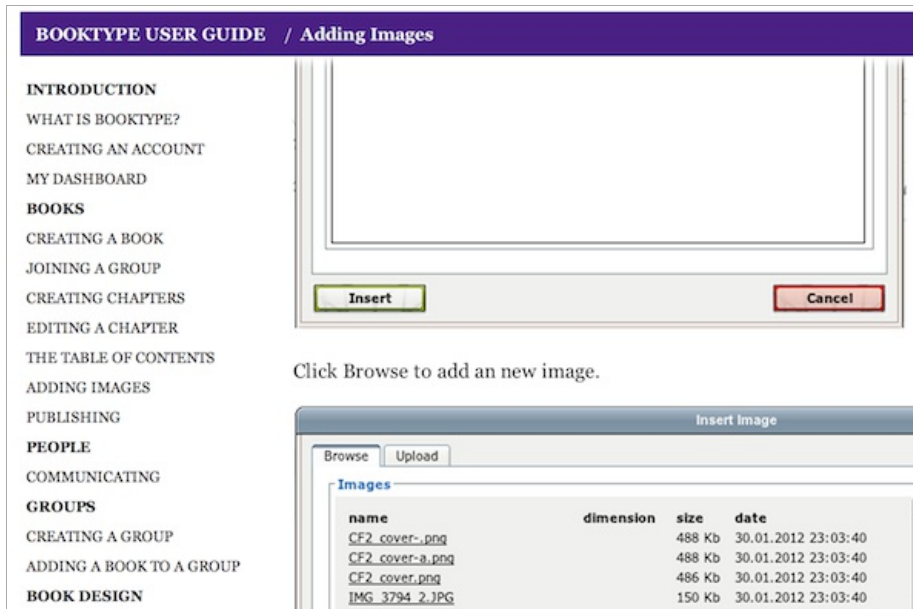
Booktype uses a component called *reader* to present books on the web. The default templates for this component are in the */usr/local/src/Booktype/lib/booki/reader/templates/* directory and customized templates for it would be copied into the */var/www/mybooktype/templates/reader/* directory.

In the following example, a custom template is created so that the table of contents is always visible while we scroll the page.



The page header is fixed at the top, with the name of the book or the chapter we are currently reading.





Click Browse to add a new image.

First, a new base template *new\_base.html* is copied into the */var/www/mybooktype/templates/* directory. This template includes the jQuery library, and creates place holders for future content. In turn, templates for the customized *reader* application will include the *new\_base.html* template.

```
{% load i18n messaging_tags booki_tags %}
<html>
<head>
  <meta http-equiv="Content-Type" content="text/html; charset=utf-8">
  <script type="text/javascript" src="http://ajax.googleapis.com/ajax/libs/jquery/1.7.1/jquery.min.js"></script>

  {% booki_site_favicon %}
  {% booki_site_metadata %}

  {% block header %}
  {% endblock %}
</head>
<body>

  {% block content %}
  {% endblock %}

</body>
</html>
```

Then the template file */var/www/mybooktype/templates/reader/book\_chapter.html* includes an additional JavaScript library and CSS file. It displays the table of contents and the content of the chapter.

The chapter content is inserted with *{% booki\_format content %}* and the table of contents is inside the variable *chapters*. A *for* loop is used to construct an unordered list with chapter titles, which is then styled with CSS.

```
{% extends "new_base.html" %}
{% load i18n booki_tags %}

{% block header %}
<title>{% blocktrans with book.title as booktitle %}/book: {{ booktitle }}{% endblocktrans %}</title>
<script type="text/javascript" src="{{ request.META.SCRIPT_NAME }}/static/js/jquery.fixed.js"></script>

<script type="text/javascript" charset="utf-8">
  $(function() {
    $('#toc-list').fixed({'top': '8'});

    $('#nav-bar-wrap').fixed({'top': '8'});
  });
</script>

<link rel="stylesheet" href="{{ request.META.SCRIPT_NAME }}/static/css/html.css" type="text/css">
{% endblock %}

{% block content %}

<div id="navigator">
  <div id="navigator-inner">
    <div id="nav-bar-wrap">
      <div id="mask"></div>
      <div id="nav-bar">
        <h1>{{ book.title }}</h1> / <h2> {{content.title }}</h2>
      </div>
    </div>
  </div>
<div id="toc-holder">
```

```

        <div id="toc-list">
            <ul>
                {% for chap in chapters %}{% ifnotequal chap.url_title None%}<li><a href="{% url book_chapter
book.url title chap.url_title %}">{{ chap.name }}</a></li>{% else %}<li><b>{{ chap.name }}</b></li>{% endifnotequal
%}{% endfor %}
            </ul>
        </div>
    </div>
</div>

<div id="top">
    <div id="header">
        <h1>{{ book.title }}</h1>
    </div>
</div>

<div id="middle">
    <div id="container">
        {% booki_format content %}
    </div>
</div>

{% endblock %}

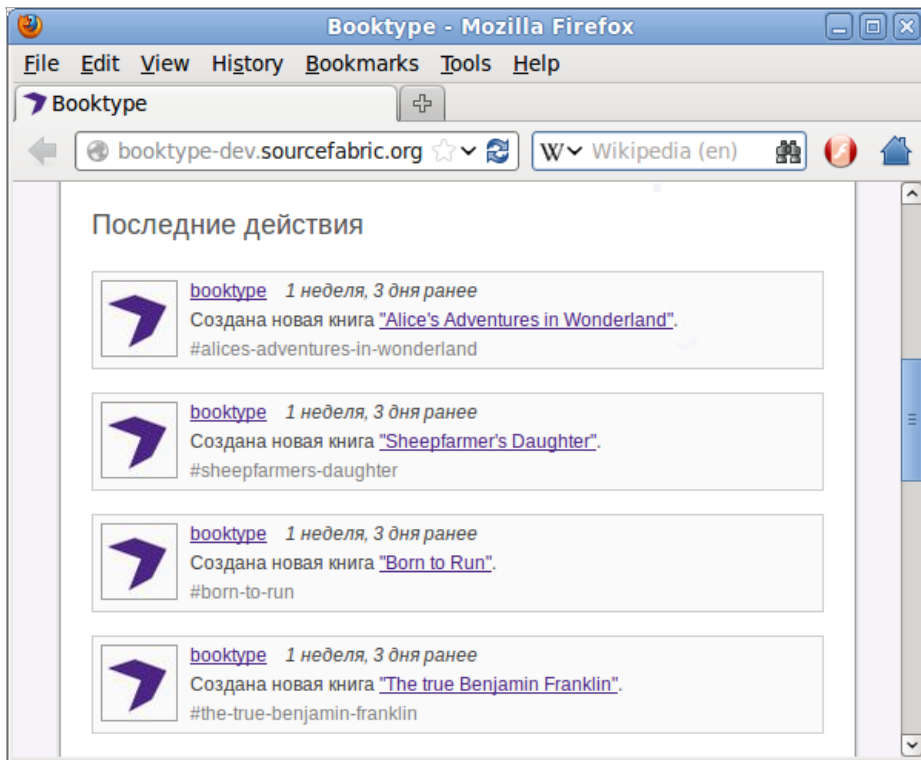
```

The files used in the example above are available to download from <https://www.sourcefabric.org/attachment/74/example.zip>

Before beginning your theming project, it is recommended that you read the Django template documentation at: <https://docs.djangoproject.com/en/1.4/topics/templates/>

# 3 | LOCALIZING THE INTERFACE

The Booktype interface can be localized using the standard GNU **gettext** method. Using GitHub for this task means you don't have to tackle the whole of a localization yourself; just as much as you can manage.



First, you should check if a localization is already under way for your locale of choice. The best way to do this is to take a look at the GitHub repository for Booktype at <https://github.com/sourcefabric/Booktype/tree/devel>. You can also ask in the Booktype development forum at <http://forum.sourcefabric.org/categories/booktype-development>, where you might find community members who can help you with the translation.

GNU **gettext** means using a `.po` file for each language or dialect, a specially formatted plain text file with groups of three or more lines, like this example from Booktype's Russian localization:

```
#: account/templates/account/create_group.html:9
msgid "There is already a group with this name."
msgstr "Группа с таким названием уже существует."
```

The first of these three lines starts with the hash symbol, and references where this string of text is found in the source code by its file name and line number. If this string is found more than once in the source code, you will see other reference lines here. The second line contains the **msgid**, which is the original version of the string. The third line contains the **msgstr**, which is the translation of that string for the localization that this particular `.po` file relates to.

If you use the cross-platform program **Poedit** <http://www.poedit.net/> to edit the `.po` file, this formatting of the text is hidden by an easy-to-use GUI. Poedit can be installed on most GNU/Linux distributions using the standard software installer. Versions of Poedit for Mac and Windows are available for free download from the project's homepage.

Before manually translating strings in poedit from scratch, you should take a look at the online translation services available which can fill in many of the `msgstr`'s for you, such as Google's Translation Toolkit <http://translate.google.com/toolkit/> which supports `gettext` `.po` files. You can then use poedit to fine-tune the localization and fix any formatting errors produced by the automatic translation.

If you don't already have a GitHub account, you can sign up at <https://github.com/signup/free>. Once you have a GitHub account, you can fork a copy (<https://help.github.com/articles/fork-a-repo>) of the Booktype project. Work for the next major version of the software is done in the **devel** branch of each project, so that's the branch to **checkout** after you have made the initial **git clone**.

In the locale code `de_DE`, `de` represents the German language and the suffix `_DE` indicates the dialect spoken in the country of Germany. Some languages have a wide variety of dialect localizations, which can be differentiated with a suffix in this way. You should update the header information in the `.po` file, which includes the language code and a country code, using one of the existing `.po` files as a guide.

Booktype has two components to translate: `lib/booki` and `lib/booktypecontrol`. After forking the Booktype git repository, make sure you're in the **devel** branch:

```
git branch
* devel
```

master

Create new locale directories (e.g. *locale/de\_DE/LC\_MESSAGES/* for German as spoken in Germany) for each component:

```
mkdir -p lib/booki/locale/de_DE/LC_MESSAGES/  
mkdir -p lib/booktypecontrol/locale/de_DE/LC_MESSAGES/
```

Then in each component directory, run the **makemessages** command, e.g. for German:

```
cd lib/booki  
django-admin.py makemessages -l de_DE  
cd ../../lib/booktypecontrol  
django-admin.py makemessages -l de_DE
```

and update the header information in the *django.po* file which will be created in the appropriate directory. Or use one of the existing .po files as a template and copy it manually into the appropriate directory, if you do not have a Django development environment set up.

After using an online translation tool to get started, if necessary, you can load the .po file into **poedit** and complete your translation. Enter the localization team's contact information and language into poedit's Edit -> Preferences and Catalog -> Settings dialogs, which will be added to the .po file. When you save a .po file in poedit, the corresponding binary .mo file will be compiled automatically.

Finally, **git add**, **git commit** and **git push** these new .mo and .po files to your GitHub fork of the project, and send a git pull request (<https://help.github.com/articles/using-pull-requests>) to the Booktype developers. The localization can then be added to a forthcoming Booktype release.

If you don't want to work with git, that's no problem - download a copy of the .po file you would like to localize, run it through Google Translate and check it with poedit, and email your contribution to the Booktype team as an attachment - it will be very welcome! However, learning to use git is a good idea, because it means you can work directly on the source code, share the localization work with the Booktype community, and avoid duplicated effort.

# **INSTALLATION**

- 32. BEFORE YOU INSTALL**
- 33. SETTING UP THE DATABASE**
- 34. INSTALLATION ON GNU/LINUX**
- 35. INSTALLATION ON OS X**

## 32. BEFORE YOU INSTALL

For most authors it will not be necessary to have their own Booktype server, and there's every reason for them not to. Setting up their own Booktype server and backing up the data on a regular basis is a task that may distract authors from writing. If authors are going to share their work with the world, there may be good reasons to share a Booktype server as well - including the ability to take advantage of Booktype's collaborative features. Managed Booktype hosting is available from Sourcefabric, with support for creating both public and private books.

If you do not wish to collaborate on the writing task with authors outside your organization, then having your own Booktype server makes more sense. Also, if you don't have reliable access to the Internet, having your own Booktype server is a practical alternative to cloud-based services. For example, a school with laptops that can connect to each other on a network but not to the Internet may find a local Booktype server valuable.

There are three parts to a typical Booktype system, and depending on your requirements you may need to install one or more of:

- Booktype itself, the writing, editing and collaboration interface
- Objavi, which exports PDFs, EPUBs and other formats from your books
- Espri, which can be used to import other books into Booktype

By default, a Booktype installation can use a public Objavi and Espri server so there may be no need to install your own copy of Objavi or Espri to begin with.

The following chapters deal with installation on both GNU/Linux and Apple OS X servers. For writing and editing books, authors can use any computer with a modern web browser, such as *Mozilla Firefox* or *Google Chrome*. *Microsoft Internet Explorer* is not currently supported.

# 33. SETTING UP THE DATABASE

Before you can install Booktype, you will need a database to be available. PostgreSQL is the recommended database management system. The following instructions were tested on Ubuntu Lucid 10.04, using **sudo** for root access to the server.

1. Open a terminal, then enter the following command to install PostgreSQL and the Python adaptor for it:

```
sudo apt-get install postgresql python-psycopg2
```

2. Create the PostgreSQL user *booktype-user* with the command:

```
sudo -u postgres createuser -SDRP booktype-user
```

Enter the password you wish to set in the database, as prompted. You will need to re-enter it for confirmation.

3. Create a database named *booktype-db*, setting *booktype-user* as the owner with the **-O** option. The encoding should be the international UTF-8 character set, as indicated with the **-E** option.

```
sudo -u postgres createdb -E utf8 -O booktype-user booktype-db
```

4. Allow connections to the database *booktype-db* for *booktype-user* by editing the PostgreSQL configuration file. The exact file name depends on the PostgreSQL version that you are using. For example, if the version was 8.4, the command to edit the file on Ubuntu would be:

```
sudo nano /etc/postgresql/8.4/main/pg_hba.conf
```

At the end of the file is a section like this:

```
# TYPE DATABASE USER CIDR-ADDRESS METHOD
```

Add an extra line at the end of the section like so, separated by spaces:

```
local booktype-db booktype-user md5
```

Save the file with the keyboard shortcut **Ctrl+O**, and then quit **nano** with **Ctrl+X**.

5. Finally, restart PostgreSQL with the command (on Ubuntu):

```
sudo invoke-rc.d postgresql-8.4 restart
```

or on Debian (as the root user)

```
invoke-rc.d postgresql restart
```

You are now ready to install Booktype. See the following chapters for details.

# 34. INSTALLATION ON GNU/LINUX

Depending on how recent your GNU/Linux distribution is, you might need to install some of Booktype's newer Python dependencies using **easy\_install** (<http://pypi.python.org/pypi/setuptools>) or **pip** (<http://pypi.python.org/pypi/pip>). This is because some GNU/Linux distributions do not have new enough packages to satisfy Booktype's requirements.

First, install the development packages and Redis server (<http://redis.io/>). On Debian or Ubuntu, you can do this in a terminal with the **apt-get** command:

```
sudo apt-get install git-core python-dev python-pip libjpeg-dev libxml2-dev libxslt-dev redis-server
```

Next, install the remaining dependencies. The following package installs have been tested on Ubuntu Lucid 10.04. Other distributions may have new enough versions of the packages available via **apt-get**.

Django, minimum version 1.2 (<http://www.djangoproject.com/>)

```
sudo easy_install django
```

SimpleJSON (<http://pypi.python.org/pypi/simplejson/>)

```
sudo easy_install simplejson
```

South (<http://south.aeracode.org/>)

```
sudo easy_install South
```

lxml (<http://codespeak.net/lxml/>)

```
sudo easy_install lxml
```

Unidecode (<http://pypi.python.org/pypi/Unidecode/>)

```
sudo pip install unidecode
```

## INSTALLING FROM THE GIT REPOSITORY

The **git** repository is an online collaboration server which contains the most up-to-date version of Booktype available.

1. Create a directory for the Booktype installation such as */var/www/mybooktype* and make sure it is owned by the *www-data* user:

```
sudo mkdir /var/www/mybooktype/  
sudo chown www-data:www-data /var/www/mybooktype/
```

Distributions other than Debian/Ubuntu may have the web server running under another username, such as *httpd*.

2. Download a copy of Booktype from the git repository to the */usr/local/src/* directory:

```
cd /usr/local/src/  
sudo git clone https://github.com/sourcefabric/Booktype.git
```

3. Change to the *Booktype/scripts* directory like so:

```
cd Booktype/scripts
```

4. Switch to the *www-data* user for the remaining steps:

```
sudo su www-data
```

5. Create the Booktype instance:

```
./createbooki --check-versions --database postgresql /var/www/mybooktype/
```

The server will respond:

```
+ Trying to import Django. [OK]  
+ Trying to import booki. [OK]  
+ Trying to import lxml. [OK]  
+ Trying to import Python Imaging Library (PIL). [OK]  
+ Trying to import Redis module. [OK]  
+ Trying to import South module. [OK]  
+ Trying to import Unidecode module. [OK]
```

Project directory does exist [/var/www/mybooktype]. Directory might be already created by administrator and you just need to populate it with booki project files...

\* If that is the case, type 'yes'.

\* If you are not sure, type 'no'.

Proceed anyway [yes/no] ? : yes



```

+ Creating data directory. [OK]
+ Creating logs directory. [OK]
+ Creating static directory. [OK]
+ Creating templates directory. [OK]
+ Creating lib directory. [OK]
+ Creating locale directory. [OK]
+ Creating data/books directory. [OK]
+ Creating data/profile_images directory. [OK]
+ Creating data/cover_images directory. [OK]
+ Creating booki.env file. [OK]
+ Creating __init__.py file. [OK]
+ Creating settings.py file. [OK]
+ Creating booki.wsgi file. [OK]
+ Creating wsgi.apache file. [OK]
+ Creating gunicorn.nginx file. [OK]
+ Creating factcgi.nginx file. [OK]

```

Check [/var/www/mybooktype] directory for config files:

```

booki.env      - Environment variables
booki.wsgi     - WSGI file for Apache
wsgi.apache   - Apache config file
gunicorn.nginx - Nginx config file
fastcgi.nginx - Nginx config file
settings.py   - Booki settings file

templates/    - Local Booki template files
locale/       - Local directory with translations
static/       - Local web files
lib/          - Local python libraries
data/         - Place for attachments

```

For further instructions read INSTALL file.

## 6. Change to the installation directory:

```
cd /var/www/mybooktype/
```

## 5. Edit the *settings.py* file:

```
nano settings.py
```

There are several sections of this file which need to be edited to suit your installation. First, set the name and email address of the system administrator:

```

# DJANGO ADMIN
ADMINS = (
    # ('Your Name', 'your_email@example.com'),
)

```

Enter the name and domain name of your Booktype server:

```

# BOOKI
BOOKI_MAINTENANCE_MODE = False

BOOKI_NAME = 'My Booktype site'
THIS_BOOKI_SERVER = 'booktype.example.com'

```

Enter email and outgoing mail server details:

```

# E-MAIL OPTIONS
REPORT_EMAIL_USER = 'booktype@example.com'

EMAIL_HOST = 'localhost'
EMAIL_PORT = 25

```

The database connection parameters should be similar to the following example:

```

# DATABASE STUFF
DATABASES = {'default': {'ENGINE': 'django.db.backends.postgresql_psycopg2',
                        'NAME': 'booktype-db',
                        'USER': 'booktype-user',
                        'PASSWORD': 'booktype-password',
                        'HOST': 'localhost',
                        'PORT': ''
                       }
            }

```

where *booktype-password* is the password that you set for the *booktype-user* when you created the *booktype-db* database in PostgreSQL.

If you have more than one application using the local Redis server, you may need to change the value of `REDIS_DB` to a number other than zero:

```

# REDIS STUFF
REDIS_HOST = 'localhost'
REDIS_PORT = 6379
REDIS_DB = 0
REDIS_PASSWORD = None

```

Finally, set the local time zone and the appropriate language code for your installation:

```
# DJANGO STUFF
AUTH_PROFILE_MODULE='account.UserProfile'
TIME_ZONE = 'Europe/London'
LANGUAGE_CODE = 'en-gb'
```

Press **Ctrl+O** to save the file and **Ctrl+X** to quit the **nano** editor.

6. Load the environment variables:

```
./booki.env
```

7. Initialize the database:

```
django-admin.py syncdb --noinput
```

The server should respond:

```
Syncing...
Creating tables ...
Creating table auth_permission
Creating table auth_group_permissions
Creating table auth_group
Creating table auth_user_user_permissions
Creating table auth_user_groups
Creating table auth_user
Creating table django_content_type
Creating table django_session
Creating table django_site
Creating table django_admin_log
Creating table south_migrationhistory
Installing custom SQL ...
Installing indexes ...
Installed 0 object(s) from 0 fixture(s)
```

Synced:

```
> django.contrib.auth
> django.contrib.contenttypes
> django.contrib.sessions
> django.contrib.sites
> django.contrib.admin
> django.contrib.messages
> south
> booki.reader
> booki.portal
```

Not synced (use migrations):

```
- booki.editor
- booki.account
- booki.messaging
- booktypecontrol
```

(use ./manage.py migrate to migrate these)

8. As suggested by the output above, migrate the remaining parts of the database:

```
django-admin.py migrate
```

The server should respond:

Running migrations for editor:

```
- Migrating forwards to 0007_auto__add_unique_publishwizzard_book_user_wizz_type.
> editor:0001_initial
> editor:0002_auto__add_field_book_hidden
> editor:0003_attributionexclude
> editor:0004_book_permission
> editor:0005_auto__add_field_book_cover__add_field_book_description
> editor:0006_auto__add_publishwizzard
> editor:0007_auto__add_unique_publishwizzard_book_user_wizz_type
- Loading initial data for editor.
Installed 0 object(s) from 0 fixture(s)
```

Running migrations for account:

```
- Migrating forwards to 0001_initial.
> account:0001_initial
- Loading initial data for account.
```

Installed 0 object(s) from 0 fixture(s)

Running migrations for messaging:

```
- Migrating forwards to 0003_auto__add_endpointconfig__add_field_endpoint_config.
> messaging:0001_initial
> messaging:0002_auto__add_field_post_snippet__add_field_post_context_url
> messaging:0003_auto__add_endpointconfig__add_field_endpoint_config
- Loading initial data for messaging.
```

Installed 0 object(s) from 0 fixture(s)

Running migrations for booktypecontrol:

```
- Migrating forwards to 0002_static_user_css.
> booktypecontrol:0001_initial
> booktypecontrol:0002_static user css
```

- Loading initial data for booktypecontrol.  
Installed 0 object(s) from 0 fixture(s)

9. Create a superuser account for the Booktype administrator:

```
django-admin.py createsuperuser
```

Enter the required information as prompted:

```
Username (leave blank to use 'www-data'): admin
E-mail address: your_email@example.com
Password:
Password (again):
Superuser created successfully.
```

10. Add common documentation licenses to the new instance of Booktype:

```
django-admin.py loaddata documentation_licenses
```

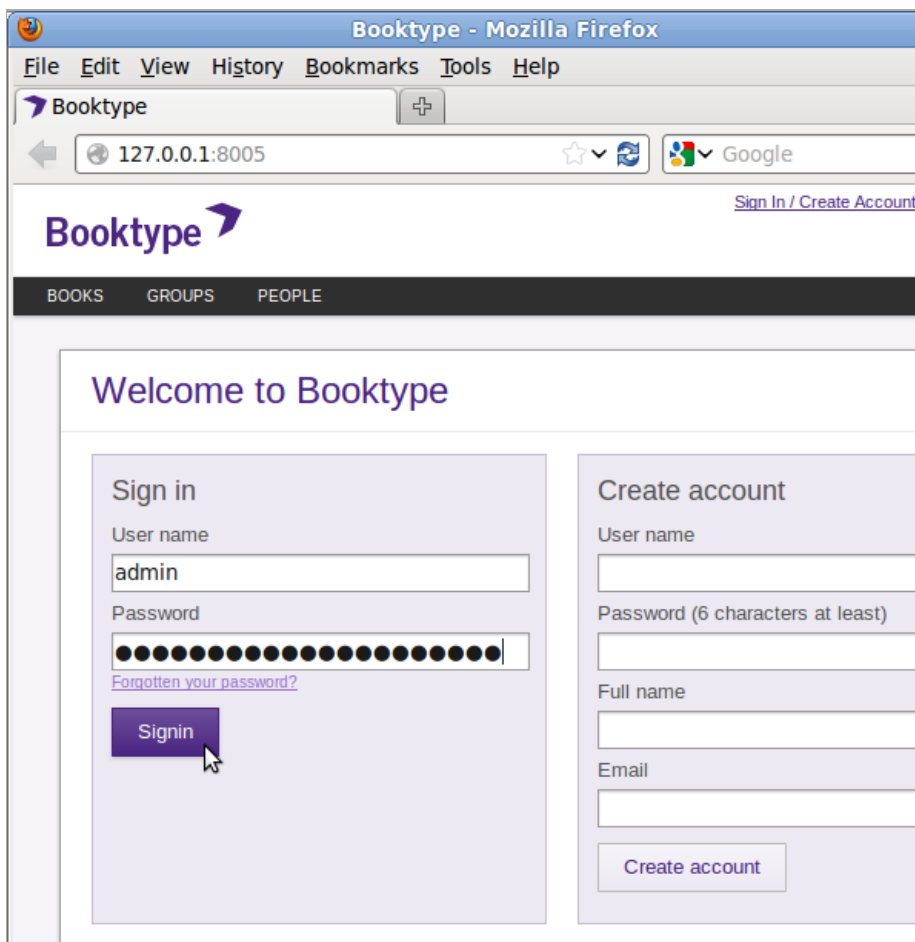
11. Start a test instance of Booktype on a port of your server which is not in use, such as 8005:

```
django-admin.py runserver 0.0.0.0:8005
```

12. Leaving the terminal running, open your web browser on the specified port at the *localhost* IP address of 127.0.0.1, for example <http://127.0.0.1:8005/>

Alternatively, if you are running Booktype on a virtual machine such as **VirtualBox**, then you should use the IP address of the virtual GNU/Linux server. You can use *bridged mode* in VirtualBox network setup to obtain a real address on the local network for the virtual machine.

If all is well, you should see the Booktype *Sign in* page in your browser. You can sign in using the superuser account details that you created in the installation step above.



Once you are confident that Booktype is installed correctly, you can press **Ctrl+C** in the terminal to shut down the test instance. Then return to your normal user prompt in the terminal with the command:

```
exit
```

so that you are no longer entering commands as the *www-data* user.

## APACHE CONFIGURATION

The standard Apache web server can be used to serve your Booktype instance to other authors and project collaborators, either on the public Internet or local networks. To use Booktype with Apache, you need to install the module for WSGI (Web Server Gateway Interface). Read the Django documentation at <http://docs.djangoproject.com/en/dev/howto/deployment/wsgi/modwsgi/> for more details.

1. Install the Apache web server (the Prefork MPM version is recommended) and the WSGI module:

```
sudo apt-get install apache2-mpm-prefork libapache2-mod-wsgi
```

2. Copy the `wsgi.apache` file generated during Booktype installation to the Apache configuration directory for virtual hosts:

```
sudo cp /var/www/mybooktype/wsgi.apache /etc/apache2/sites-available/booktype
```

3. Edit the configuration file for your system:

```
sudo nano /etc/apache2/sites-available/booktype
```

You should change at least the values for `ServerName`, `ServerAdmin` and `SetEnv HTTP_HOST` to match the domain name configured for the server.

```
<VirtualHost *:80>
    # CHANGE THIS
    ServerName booktype.example.com
    ServerAdmin admin@example.com
    SetEnv HTTP_HOST "booktype.example.com"
```

Press **Ctrl+O** to save the file and **Ctrl+X** to quit the **nano** editor.

4. Enable the Booktype virtual host, with the command:

```
sudo a2ensite booktype
```

5. Restart the Apache webserver with the command:

```
sudo invoke-rc.d apache2 restart
```

You should now be able to browse your Booktype instance at the URL defined in the `VirtualHost` configuration, such as <http://booktype.example.com/> in the example above.

## SUBDIRECTORY INSTALLATION

It is possible to serve a Booktype instance under a URL such as <http://www.example.com/booktype/> or similar. You would have to set the `THIS_BOOKI_SERVER` value in your project `settings.py` file, and adjust your Apache configuration file to point to that subdirectory.

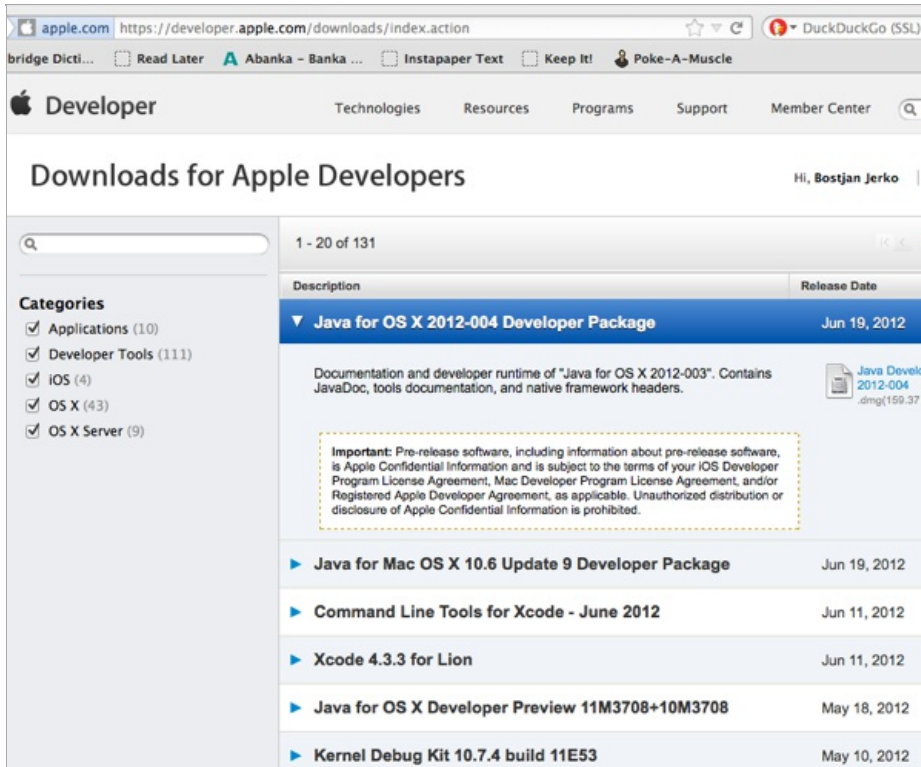
## MULTI-SITE INSTALLATION

You can have more than one Booktype instance on your server. To do this, create multiple Booktype projects under different filesystem paths such as `/var/www/mybooktype2`, `/var/www/mybooktype3` and so on. Then copy the Apache2 configuration from each Booktype project to the Apache configuration directory `/etc/apache2/sites-available/` under different names, editing the `ServerName` and `SetEnv HTTP_HOST` values for each file. You will need to ensure that the new domain names you have chosen are appropriately configured in DNS. Finally, enable each site with the `a2ensite` command and restart the Apache server.

# 35. INSTALLATION ON OS X

Before installing Booktype on an OS X server, you need to create a suitable environment. You can use the command line tools **easy\_install** to obtain the necessary Python dependencies and **Homebrew** to install Redis. The page at <http://mxcl.github.com/homebrew/> provides instructions for a first time install of Homebrew.

To use Redis you need to install **Command Line Tools for Xcode** which can be found at the Apple developer web pages (<https://developer.apple.com/downloads> - you'll need an Apple ID before you are allowed to download), and **xcode** which can be downloaded using the OS X app store.



After the successful installation of Homebrew, open a terminal and enter the command:

```
brew install redis
```

Then install the Python dependencies, with the commands:

```
easy_install django
easy_install lxml
easy_install pil
easy_install simplejson
easy_install south
easy_install unicodecode
```

Optionally, you can install these Python packages in a virtualenv (Python virtual environment).

Now it's time to install Booktype. To download Booktype from the source code repository you'll need **git** from <http://git-scm.com/download/mac> or the native GitHub application from <https://central.github.com/mac/latest>

Once git is installed, you can download Booktype with:

```
git clone https://github.com/sourcefabric/Booktype.git
```

Open another terminal, and enter the command:

```
redis-server
```

to run Redis.

```
bostjan — redis-server — 80x24
redis-server
[3708] 22 Jun 20:10:47 - 0 clients connected (0 slaves), 925184 bytes in use
[3708] 22 Jun 20:10:52 - DB 0: 9 keys (0 volatile) in 16 slots HT.
[3708] 22 Jun 20:10:52 - 0 clients connected (0 slaves), 925184 bytes in use
[3708] 22 Jun 20:10:57 - DB 0: 9 keys (0 volatile) in 16 slots HT.
[3708] 22 Jun 20:10:57 - 0 clients connected (0 slaves), 925184 bytes in use
[3708] 22 Jun 20:11:02 - DB 0: 9 keys (0 volatile) in 16 slots HT.
[3708] 22 Jun 20:11:02 - 0 clients connected (0 slaves), 925184 bytes in use
[3708] 22 Jun 20:11:07 - DB 0: 9 keys (0 volatile) in 16 slots HT.
[3708] 22 Jun 20:11:07 - 0 clients connected (0 slaves), 925184 bytes in use
[3708] 22 Jun 20:11:12 - DB 0: 9 keys (0 volatile) in 16 slots HT.
[3708] 22 Jun 20:11:12 - 0 clients connected (0 slaves), 925184 bytes in use
[3708] 22 Jun 20:11:17 - DB 0: 9 keys (0 volatile) in 16 slots HT.
[3708] 22 Jun 20:11:17 - 0 clients connected (0 slaves), 925184 bytes in use
[3708] 22 Jun 20:11:22 - DB 0: 9 keys (0 volatile) in 16 slots HT.
[3708] 22 Jun 20:11:22 - 0 clients connected (0 slaves), 925184 bytes in use
[3708] 22 Jun 20:11:27 - DB 0: 9 keys (0 volatile) in 16 slots HT.
[3708] 22 Jun 20:11:27 - 0 clients connected (0 slaves), 925184 bytes in use
[3708] 22 Jun 20:11:32 - DB 0: 9 keys (0 volatile) in 16 slots HT.
[3708] 22 Jun 20:11:32 - 0 clients connected (0 slaves), 925184 bytes in use
[3708] 22 Jun 20:11:37 - DB 0: 9 keys (0 volatile) in 16 slots HT.
[3708] 22 Jun 20:11:37 - 0 clients connected (0 slaves), 925184 bytes in use
[3708] 22 Jun 20:11:42 - DB 0: 9 keys (0 volatile) in 16 slots HT.
[3708] 22 Jun 20:11:42 - 0 clients connected (0 slaves), 925184 bytes in use
```

Back in the original terminal, where you downloaded Booktype with git, change to the *scripts* directory and create a Booktype instance called 'mybooki' with the command:

```
./createbooki --database sqlite $HOME/mybooki
```

Change to the target directory and edit the *settings.py* file to suit your installation. In this example we are using a python virtualenv and an sqlite3 database:

```
DATABASES = {
    'default': {
        'NAME': '/Users/bostjan/peskovnik/virtualenv/booktype/mybooktype/database.sqlite',
        'ENGINE': 'django.db.backends.sqlite3',
        'USER': '',
        'PASSWORD': ''
    }
}
```

Then edit *TEMPLATE\_LOADERS* to read:

```
TEMPLATE_LOADERS = (
    'django.template.loaders.filesystem.Loader',
    'django.template.loaders.app_directories.Loader',
)
```

Load the environment variables, with the command:

```
./booki.env
```

Then populate the database with data:

```
django-admin.py syncdb --noinput
django-admin.py migrate
django-admin.py createsuperuser
django-admin.py loaddata documentation_licenses
```

If you get an *unknown locale: UTF-8* error try the command:

```
export LC_ALL=en_US.UTF-8; export LANG=en_US.UTF-8
```

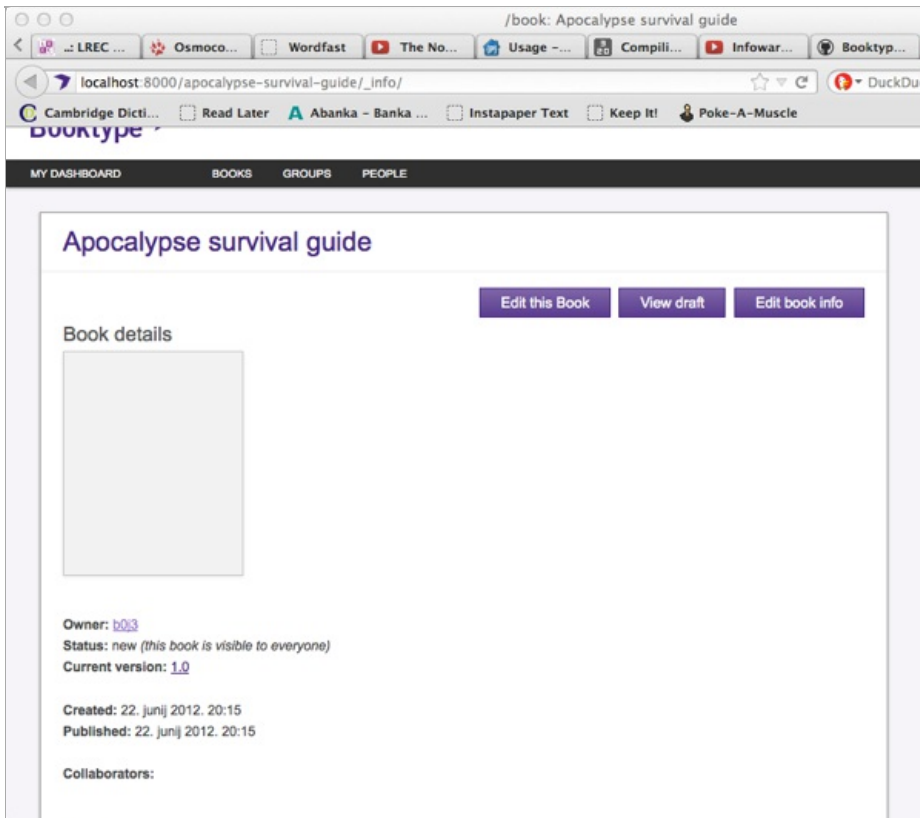
before running the above commands again. Finally, run a test server with:

```
django-admin.py runserver
```

```
python
File "/Users/bostjan/peskovnik/virtualenv/lib/python2.7/site-packages/Django-1.4-py2.7.egg/django/utils/translation/__init__.py", line 75, in gettext_noop
    return _trans.gettext_noop(message)
File "/Users/bostjan/peskovnik/virtualenv/lib/python2.7/site-packages/Django-1.4-py2.7.egg/django/utils/translation/__init__.py", line 48, in __getattr__
    if settings.USE_I18N:
File "/Users/bostjan/peskovnik/virtualenv/lib/python2.7/site-packages/Django-1.4-py2.7.egg/django/utils/functional.py", line 184, in inner
    self._setup()
File "/Users/bostjan/peskovnik/virtualenv/lib/python2.7/site-packages/Django-1.4-py2.7.egg/django/conf/__init__.py", line 40, in _setup
    raise ImportError("Settings cannot be imported, because environment variable
%s is undefined." % ENVIRONMENT_VARIABLE)
ImportError: Settings cannot be imported, because environment variable DJANGO_SETTINGS_MODULE is undefined.
(virtualenv)Bostjans-MacBook-Pro:mybooktype bostjan$ ./booki.env
(virtualenv)Bostjans-MacBook-Pro:mybooktype bostjan$ django-admin.py runserver
Validating models...

0 errors found
Django version 1.4, using settings 'mybooktype.settings'
Development server is running at http://127.0.0.1:8000/
Quit the server with CONTROL-C.
```

Then open `http://localhost:8000/` in your web browser to see the test server.



# HELP

**36. WHERE TO GET SUPPORT**

**37. ABOUT THIS MANUAL**



# 36. WHERE TO GET SUPPORT

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**Contact:** Finally, when all other avenues have been exhausted, email us directly at [contact@sourcefabric.org](mailto:contact@sourcefabric.org) and we'll try to help!

# 37. ABOUT THIS MANUAL

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This manual was written by Adam Hyde, Aleksandar Erkalović, Trevor Parsons, Daniel James and the Booktype community, using the tools at Booktype Pro. Please add your comments and contributions at: <http://en.flossmanuals.net/booktype/>

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