

HOW TO PRODUCE A THEORY ON DEMAND

MANUAL
December 2019

This version of the original ToD toolkit has been revised and updated by Valeria Pugliese.
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HOW TO PRODUCE A THEORY ON DEMAND

1. INTRODUCTION	5
2. MANUSCRIPT	7
3. PRODUCTION	9
3.1 Preparations	
3.2 Making the Epub	
3.3 Making the pdf	
3.4 Publishing the Book	
APPENDIX METADATA	27

1.

INTRODUCTION

The Theory on Demand presents an ‘archive of content production’ of high-quality open access publishing available for print-on-demand. The series includes reprints of theoretical new media work, for example dissertations or books that have gone out of stock, but also new work that is unfit for traditional publishers. The ToD topics are not meant for the mainstream audience, but does try to make theory accessible for a non-academic audience.

Theory on Demand books are published primarily in PDF and Epub format. [Lulu](#) is used as the print-on-demand service. The series was developed in order to publish in print-on-demand format to avoid high costs of printing, shipping and keeping stock (INC is a small team). This way, the books can be printed and shipped on demand and never run out of stock. This series also helps authors with a speedy publishing process, and after publication the book does not end up behind a paywall but is freely available for just the printing costs (which we try to keep at a minimum).

As INC is small team so the number of publications we can take on is limited. INC does not just publish, we establish long-term relations with authors and editors and see our publications as collaborations on topics we find important.

Before a publication is taken on, it is important that the author(s) or editor(s) have a good understanding about the publishing process and what they can (and cannot) expect.

2.

MANUSCRIPT

Before a book can be taken into production some things need to be clear first. It is important that the author or editors have a good understanding about the process and what they can (and cannot) expect. Use the Authors and Editors Guide to Publishing at INC for this.

The decision to publish a book is based on the final version of the manuscript. INC decides when a manuscript is final. Sending in a manuscript does not automatically mean it will get published. Most of the times some editorial work is still required.

The manuscript needs to be in line with the INC style guide. Please take note of this as early on as possible. You can find INC style guide in 'help' folder.

CHECKLIST

INC Style Guide	Authors	Authors have received and applied the Style Guide.
Docx files	Authors	Manuscript is sent in separate documents, one for each chapter, with styling done according to style guide. Images are sent as separate files.
Images	Authors	Send in a separate file or folder, with permissions, in the highest possible quality, including instructions where they should be placed in the text. Images will be converted to grey scale for LULU version to keep the print version affordable.
ToC	Authors	Provide the table of contents and how it should be structured for the book.
Extra's	Authors	Are there any formula's, tables, indexes, special or foreign characters, special pages or special design requests?
Title	Authors	The definite title.
Cover text	Authors	Synopsis + short bio = 250 words.
Cover design	INC	Ask designer to make the cover.
ISBN digital & print	INC	Definite title, names of authors, names of editors.
Copy editing	Authors	Will there be a copy editor? INC will check the documents for style, but copy editing is not part of the publishing process.
Colophon	Authors	Copy-editors, translation, funding, etc. What needs to be listed here?
Metadata	Authors	INC will ask the authors to fill in the metadata (see appendix).

3.

PRODUCTION

This manual shows you, step by step, how to create a Theory On Demand.

For more information about the workflow and creating output for print files, visit the [PublishingLab site](#). There you can also find a useful FAQ there.

The Hybrid Publishing Toolkit method builds on chapter 6 of the [Hybrid Publishing Toolkit](#) book, it relies on a makefile and using the command line.

3.1 Preparations

STEP 1 — PREPARE YOUR DESKTOP: INSTALL ALL REQUIREMENTS

Before you begin you will need to install:

- Text processor (Microsoft Office or OpenOffice);
- [GitHub Desktop](#) (for working collaboratively);
- Markdown editor like MacDown and XCode for Mac or MarkdownPad for Windows (to edit your sourcefiles);
- Plain-text editor (like [Sublime Text](#) or Gedit);
- [Adobe InDesign](#);
- Optional: [Calibre](#) (to view/edit ebooks);
- [Pandoc](#) (you can install Pandoc with [Homebrew](#)) install the older version of Pandoc: [pandoc-1.19.2.1-osx](#), this version is included in the TOD Manual Master;
- Git (for Mac git is included in Xcode, for Windows see <https://git-scm.com/download/win>);
- You will need to familiarize yourself with the command line ([terminal](#) on Mac or go to the Start menu on Windows and type cmd into search/run – more [here](#));
- Install the fonts, you can find them in the library (lib folder).

Make sure you login to the INC [Github desktop](#) (not browser) (ask for pw):

User:

Pass:

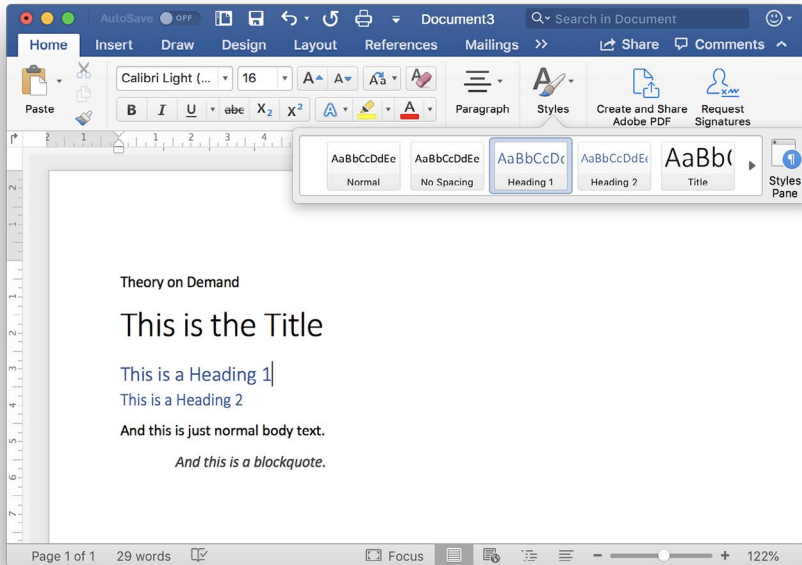
STEP 2 — PREPARE THE MANUSCRIPT

The Word document should already have been prepared according to the INC Style Guide and document formatting.

If needed, fix issues or send back to the editor/author.

Document Formatting

Check that the title, headlines, the body text, and the blockquotes are formatted accordingly so that the structure will appear later on in your markdown-file. For this, refer to the template options offered by Word (check the use of capitals as well, see INC style guide).



Defining the headers

Organizing the Word Files

Divide your document according to its parts, for each part make a separate file. Keep attention that you **avoid any space or special characters** in file and folder titles.

So please don't use any of these: !@#\$%^& > < ? € [] \ , . - _ = +.*

Number the Files Properly

- 00titlepage
- 01colophon
- 02introduction
- 03chapter1
- 04chapter2
- xxbiographies (depending on where biographies are placed in the book, usually this is the last chapter)

Also include an empty, single page doc for the TOC.

IMPORTANT: please make sure that you save your Word files as .docx.

Organize your image folders accordingly number the images by chapter and order. This should already have been done by the authors/editors. Realize that there also need to be a set of black and white images for the LULU version, use for instance the coloursync utility for this.

IMPORTANT: Make sure you have **two imgs folders**, one in the root folder, and one in the md folder. The imgs folder within the md folder contains the color images for the Epub, the imgs folder in the root folder contains also the black and white images for the LULU pdf.

STEP 3 — PREPARE REPOSITORY: GET YOUR GIT ON

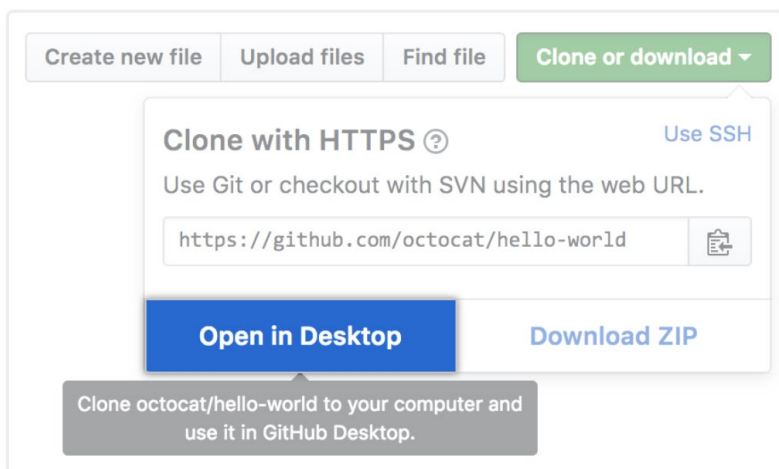
Go to <https://github.com/> and login:

User:

Pass:

Create a new repository according to the title of your book. Please include number and title of the book, for instance TOD23kaos.

Clone the repository to your GitHub desktop: click “Clone or download”, then “Open in Desktop”.



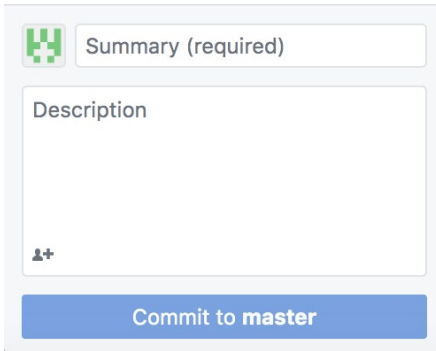
Clone repository

STEP 4 — PREPARE FOLDER: COMMIT TO MASTER

Copy folders from the TODManual repository (from the manual) to your own theory on demand repository (on your desktop):

- Make sure you copy all folders and make-files;
- Make sure your manuscript(s) are saved as .docx files and move them to the .docx folder, replacing the Test-chapter.docx file;
- **Remove the example files, keep the template files and instructions;**
- Check again: Avoid any special characters in the title and number them properly: 01colophone, 02introduction, 03chapter1 etc.
- Copy all your images (.jpg or .png) in the imgs folders except the cover, the cover.jpg image belongs in the epub folder.

Make sure you upload all changes to the repository on github.org by clicking 'commit to master' and 'sync' in the GitHub desktop.



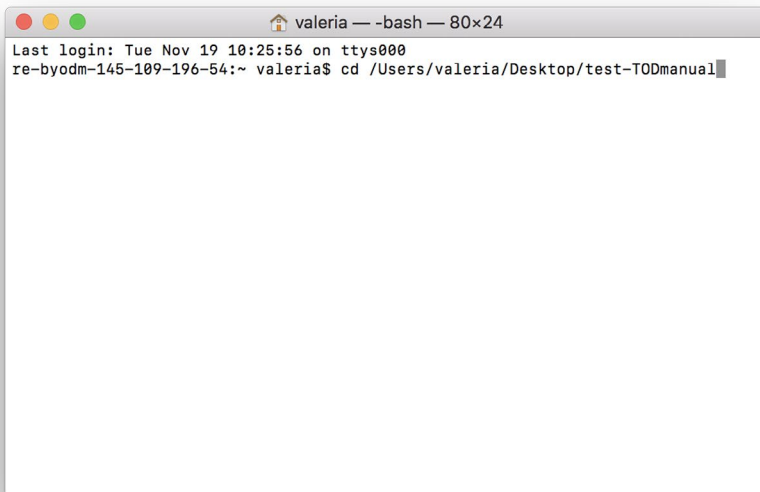
Commit to master on GitHub

3.2 Making the Epub

STEP 5 — MAKE MARKDOWN PLAIN-TEXT FILES

Use the command line in the terminal to navigate to your resources folder. You will need some knowledge of using the command line, you can find help with this [here](#). You can navigate to that specific folder by typing `cd`, and then dragging and dropping to the terminal the specific folder (+ enter).

`cd pathofyourfolder`



Terminal

After navigating to the right folder, create the source file(s) for your ebook by typing in “make markdowns”, then press enter:

make markdowns

A screenshot of a macOS Terminal window titled "test-TODmanual — -bash — 80x24". The window shows the following text: "Last login: Tue Nov 19 10:25:56 on ttys000", "re-byodm-145-109-196-54:~ valeria\$ cd /Users/valeria/Desktop/test-TODmanual", and "re-byodm-145-109-196-54:test-TODmanual valeria\$ make markdowns". The cursor is at the end of the last line.

```
test-TODmanual — -bash — 80x24
Last login: Tue Nov 19 10:25:56 on ttys000
re-byodm-145-109-196-54:~ valeria$ cd /Users/valeria/Desktop/test-TODmanual
re-byodm-145-109-196-54:test-TODmanual valeria$ make markdowns
```

Terminal

You will find the markdown files you created in the md-folder.

IMPORTANT: From now on, the Markdown files will be the working documents. Any changes made after this step will have to be made in the .md files. If for some reason you make changes in the Word files, you need to remake the .md files. Try to prevent this.

STEP 6 — EDIT THE .MD FILE(S)

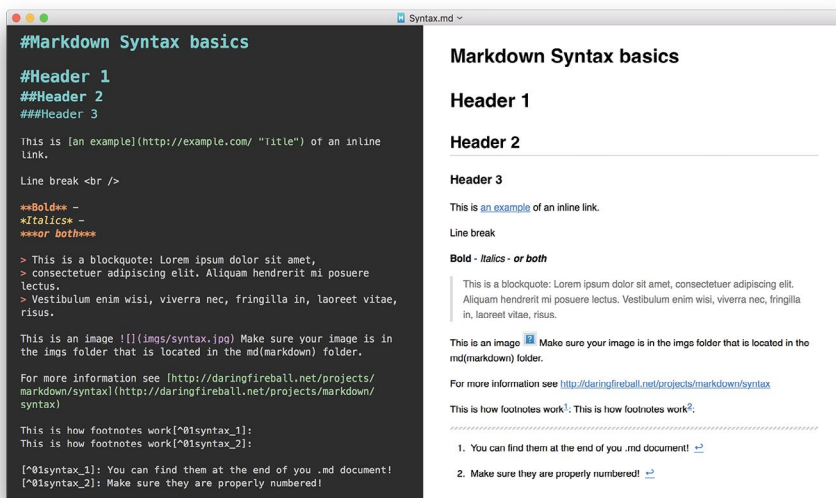
Make sure you check the .md file(s) for any errors or glitches.

Fill out the metadata at the beginning of your .md file(s). Check with the editor if you have the right metadata information, including the ISBN number. Here is more information about [metadata](#).

Syntaxes

Make sure every H1, H2, footnote, blockquote etc. is converted correctly.

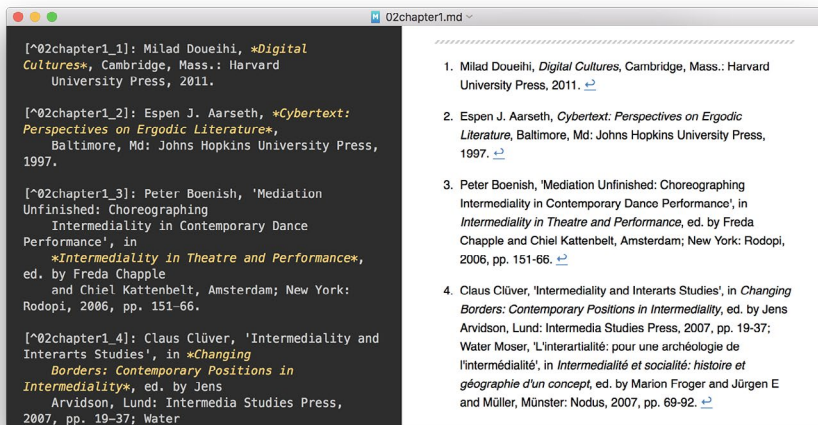
In the image you can see the most used syntaxes. For more examples see [here](#) or Syntax.md file in 'help' folder.



MD syntax basics

Footnotes

They appear at the end of you .md file(s) and look like this:



Footnotes

Sometimes it could happen that the numbering of the footnotes is not correct. The correct wording for footnotes is [^02chapter1_1] where you can see to which chapter a footnote belongs. To fix different wording, you can try to convert the files from .md to .docx and then reconvert them in .md using <https://cloudconvert.com/md-to-docx>.

Images

Make sure you add your images manually to the .md file(s) by using the syntax:

![caption text goes here](imgs/21imagesyntax.jpg)

To style the captions of the images correctly, leave one line space empty after the image syntax, then **
** and the another empty line space.

Cover: Make sure you name your cover image cover.jpg, and add it to the epub folder. The designer will have sent you the design for the cover. The title of the book and all other info has to be added to the design (in placeholders). Then export the cover from Indesign as .jpg. See step 15.

Tables

If tables do not transfer correctly from Word, ~~here is a link~~ to an online table generator. Use it to make tables directly on MacDown.

Title

You have to change the title of your book inside metadata sheet (epub > metadata.xml)

STEP 7 — MAKE A HYPERLINKED TABLE OF CONTENTS

Although the EPUB will have an automated index, it is good to have a table of contents with hyperlinks as well. See examples (f.i. Good Data) on why this is so.

Update the TOC.md file with links to chapters in EPUB with the following syntax:

** **1: Introduction: What is (in) Good Data** **

Mind that the identifiers (xxx.xhtml) are numbered in this way: ch000, ch001, ch015, etc. according to how many .md file you have. This is independent from the actual file names. Otherwise it will not work.

IMPORTANT: Hyperlinks work only to link chapters titles with this syntax **#title** in .md files. If you want to link subparagraphs titles **##subparagraph-title** you should use the same syntax at the expense of the hierarchy of formatting.

STEP 8 — CONVERT TO EPUB

Now that you have your markdown file(s), you can create an epub:

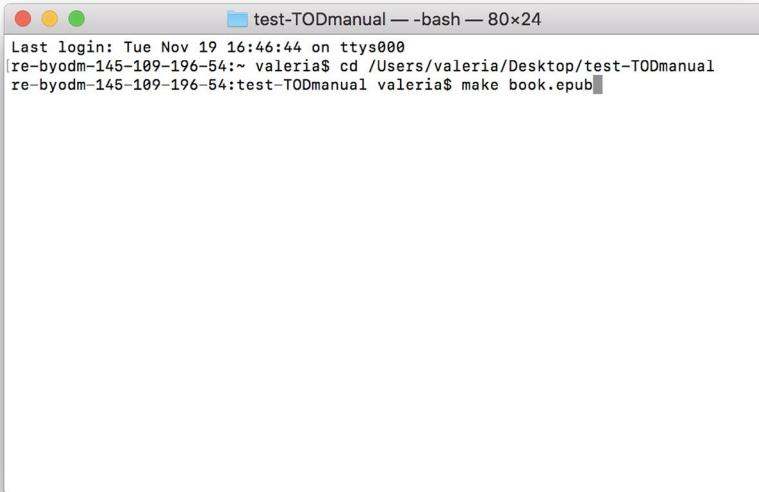
Open the terminal, navigate to your resources folder as you did step 5:

cd (with a space at end) pathofyourfolder

Then, type in "make book.epub" in your command line and press enter:



make book.epub



Make book.epub

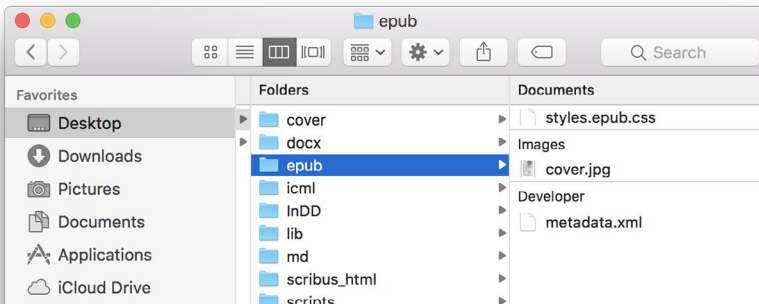
Check the resources folder to see your book.epub file, which you can open with Calibre or iBooks.

If you get an error message, there is a useful resource section [here](#) to help you.

STEP 9 — DESIGN YOUR EPUB

A successful epub has been visually styled (with css and a cover), correctly classified (with metadata), and validated. The epub folder typically has 3 important components:

- the cover image (jpg)
- the metadata file
- the stylesheet



Epub folder components

Fill in the metadata in the metadata.xml file.

The look of your book is controlled by the styles that you can find in the stylesheet. You can get color values and typeface suggestions from the print designer. Make sure you embed the fonts you use by including them in the make file and in the lib folder. Here's more information about [type in epub](#)s.

If you want to change fonts and colors etc. within the epub you need to do this in the styles.epub.css.

If the [tables did not transfer well](#) to the Epub try to reconstruct them with the [Tables Generator](#).

If you are having a [problem with your table of contents](#) in the EPUB, try to comment out the following line of your style sheet:

```
page-break-before: always;
```

so that it looks like this:

```
/*page-break-before: always;*/
```


Or replace always with **none**.

STEP 10 — VALIDATING YOUR EPUB

Last, but not least, the developer needs to validate the epub to make sure there are no errors that will cause it to be rejected from a retailer or not open correctly for readers:

You can use an online validator like <http://validator.idpf.org> or <https://www.ebookit.com/tools/bp/Bo/eBookIt/epub-validator>.

If your ePub is more than 10MB, you can try with this one: <https://www.pagina.gmbh/produkte/epub-checker/>. The validator will show you where the errors are in your book. See the example below:

 **International Digital Publishing Forum**
Trade and Standards Organization for the Digital Publishing Industry

EPUB Validator (beta)

Results

Detected version: EPUB 3.0.1

Results: The following problems were found in *book.epub*:

Type	File	Line	Position	Message
ERROR	content.opf	29	129	Error while parsing file "value of attribute "media-type" is invalid; must be a string matching the regular expression "[a-zA-Z0-9#&\$%+!~*_,;"]*".
ERROR	ch002.xhtml	47	56	Referenced resource could not be found in the EPUB.
ERROR	ch002.xhtml	51	56	Referenced resource could not be found in the EPUB.
ERROR	ch003.xhtml	16	56	Referenced resource could not be found in the EPUB.

Validated using [EpubCheck](#) version 4.0.1.

Epub validator

The error occurs in chapter ch002.xhtml, line 47, there is an explanation that a 'referenced resource is missing', but it helps a lot to edit the book in [Calibre](#) and further diagnose that in this case an image is missing.

!!! **NOTE:** the current version of the TOD can generate an error about the stylesheet. This error can be ignored (has been tested).

3.3 Making the pdf

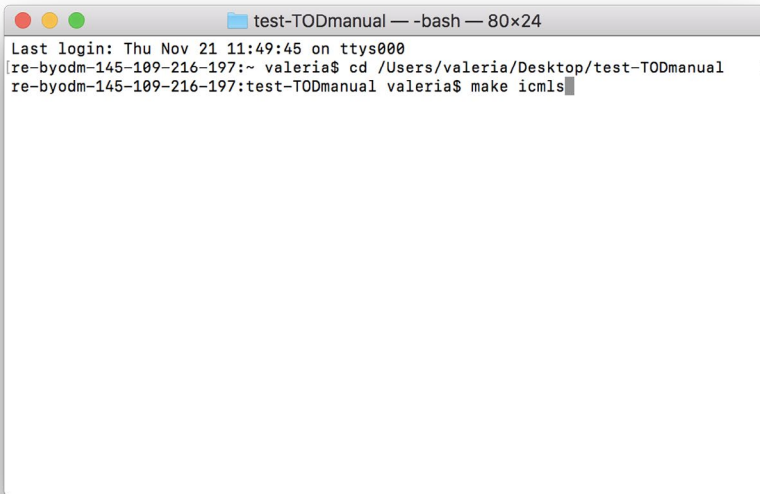
STEP 11 — MAKE THE ICML'S

Open the terminal and navigate to your resources folder as you did before.

cd (with a space at end) pathofyourfolder

Use the command line to convert your md files to icml files by typing:

make icmls



Make icmls

Press ENTER. You can then find the icmls in the icml folder.

If the folder is not created automatically, make an icml folder and try again.

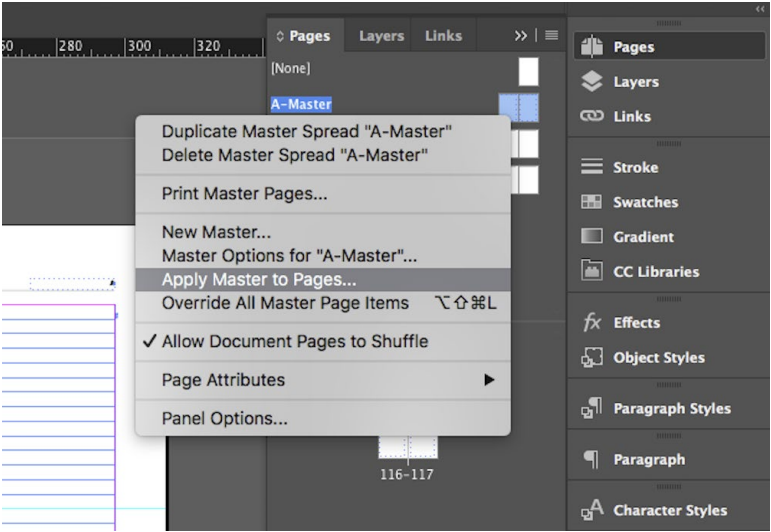
STEP 12 — LOAD ICMLS IN INDESIGN

Update the master page, where you can insert the title of your book into the header. At this point, you do not need to worry about the page numbers. They will update when you will merge all the files together in the end.

Copy the TemplateTOD.indd file or the TemplateREADER.indd file (according to your book's series) in the InDD folder. Copy the template file for each of your icml-files. Rename the files and make sure you do not use any special characters:

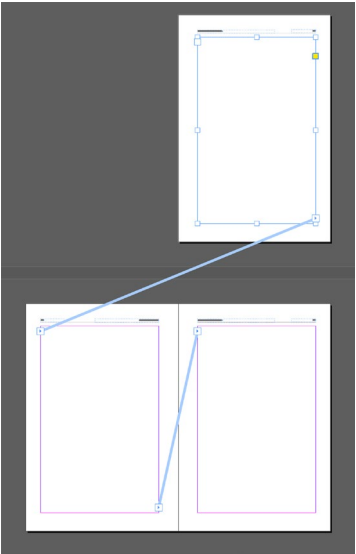
- 01colophone
- 02acknowledgments
- 03introduction
- 04chapter1

Open the first template and make sure that you apply the master to pages (all pages).



Apply master

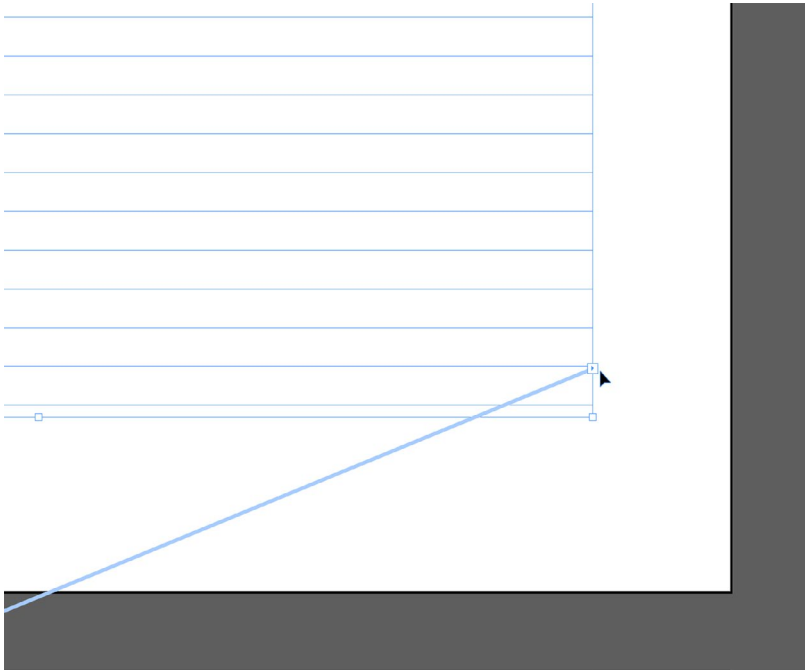
The next step is to link the text boxes.



Linking the text boxes

Activate the already existing text frame on the first page of the template. For this, press **COMMAND + SHIFT** and click on the text frame you want to activate.

Then click on the little box on the right bottom side of the text box and click on the next text box. Repeat for the other page (linking page 2 to page 3).



Linking the text boxes

This should link all the pages. Check with **View > Extra > Show text threads**.

Now, you can place the icml file you would like to start with into the document by either using **COMMAND + D**, or by clicking

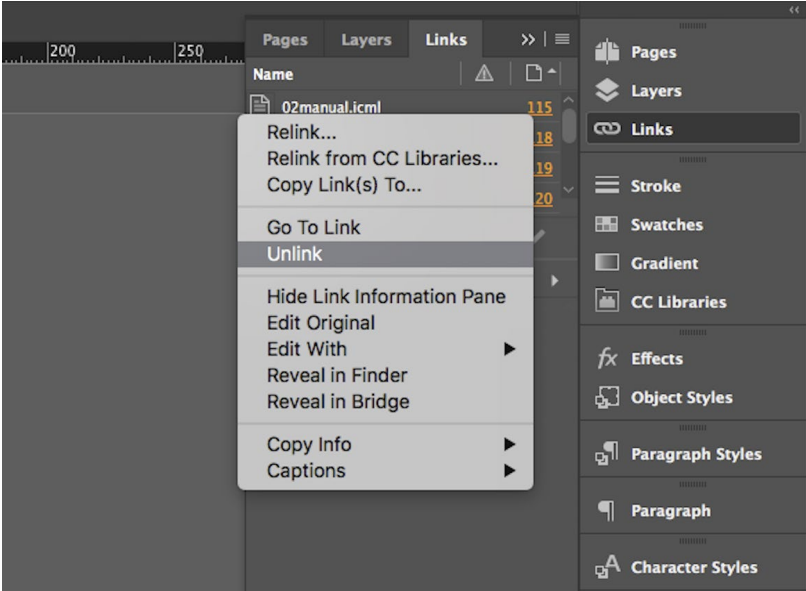
File > Place

If the text has only loaded on the first page, undo and repeat while holding **SHIFT**. If you hold **SHIFT** you will see the sign on the mouse arrow change to a curve shape (this is called autoflow). Place again and the text should have loaded and additional pages created automatically.

Before you are able to edit/design the text in InDesign make sure you check out:

Edit > InCopy > Check Out

or unlink the icml file from the links menu.

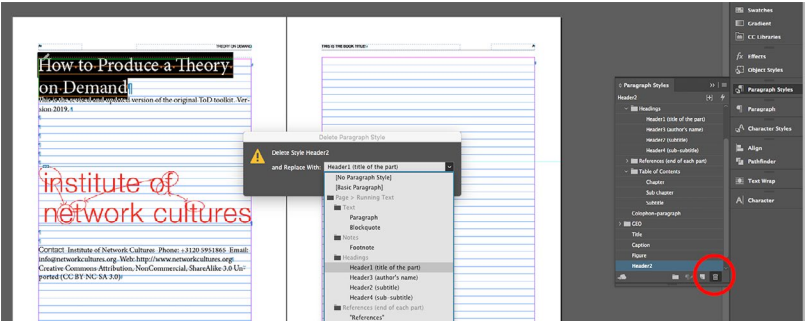


Unlink or check out

IMPORTANT: If you have icmls with images, some text might be not loaded in the template. Carry out the step described below (delete the styles etc.) before worrying about that (or have a look at [images size](#) in step 13).

STEP 13 — DESIGN YOUR BOOK

Delete the styles from the different text components (headings, paragraphs, footnotes) and replace with the corresponding paragraph style from the TOD style. You do this by selecting a text component, go to paragraph styles, and from the menu choose: delete style.



Delete style

Then replace the style with the corresponding style from the TOD paragraph style. Repeat this for every type of text component.

The right styles should have been applied automatically throughout the file.

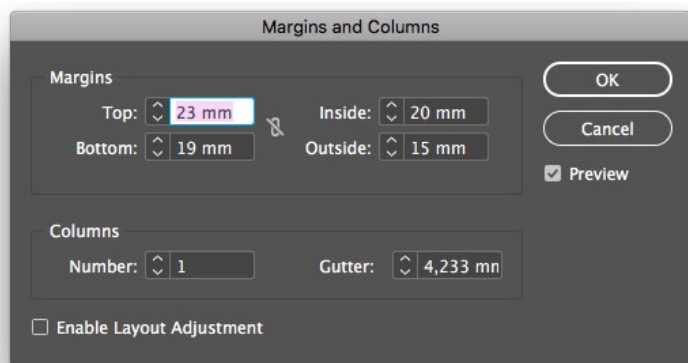
- H1, H2, H3, titles use Lato font
- Body text use Trade Gothic Light

Make sure that no font is missing – if so, please install the missing fonts. You can find them in the folder “lib” in your Manual.

Check the book for:

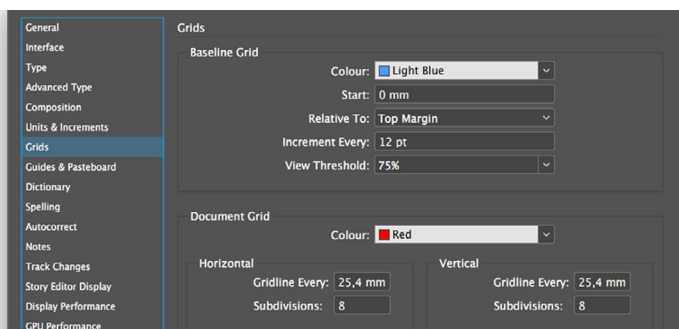
- strange abbreviations, adjust where necessary
- orphan sentences
- captions belong to images/tables in the same page

Also, check if the margins and document presets equal with what you can see in the following figure:



Margins

In the Document Preferences you can adjust your baseline grid. You can see the necessary settings in the following figure. Please make sure that it matches with what you can see in your template.



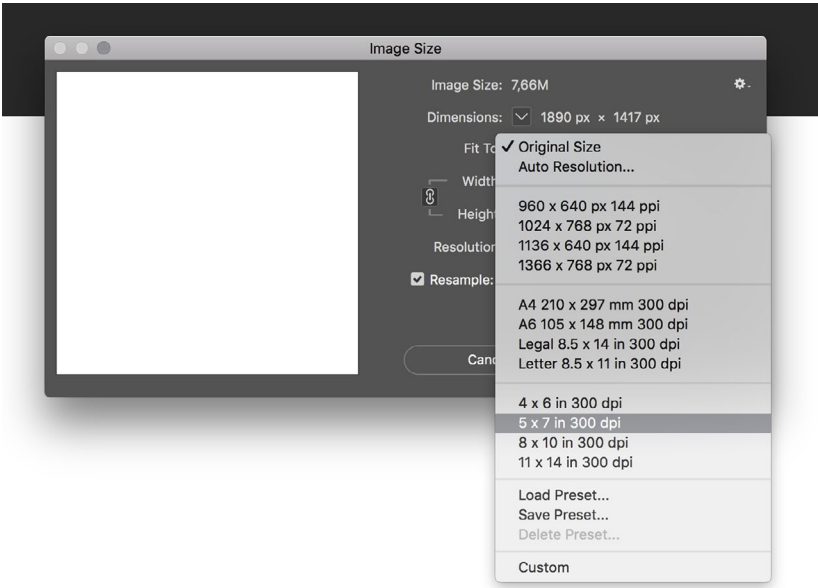
Preferences

Images size

If after replacing the text styles, you still cannot load the images it means that your images size is too big for InDesign template (text box width: 120 mm).

In that case, you should:

- Resize your images by photoshop



Resize your images

- Update these images in the imgs root folder (it isn't necessary update them in the .md folder)
- Make the icml files again.

Table

To edit a table in InDesign, you must use the Type tool, not the selection tool. Once you have the Type tool selected, you can select the table, rows, columns, and edit them.

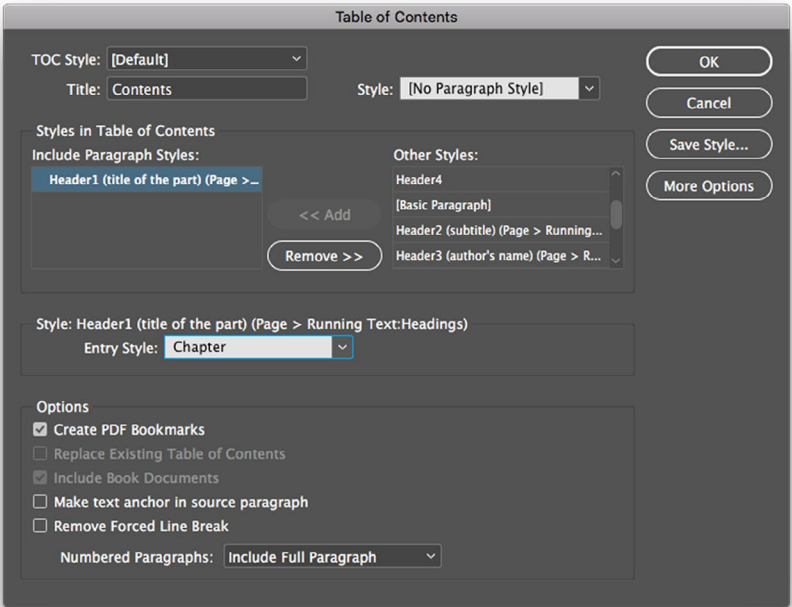
Table of contents (after assembling the book – step 14)

Before generating a table of contents, remember that paragraphs you want to include in the ToC (such as section headings and chapter titles) should have paragraph styles applied for each.


Choose Layout > Table Of Contents

Determine which content you want to include in the table of contents by double-clicking paragraph styles in the 'Other Styles' list to add them to the 'Include Paragraph Styles' list.

Specify options to determine how each paragraph style in the Table of Contents is formatted



ToC

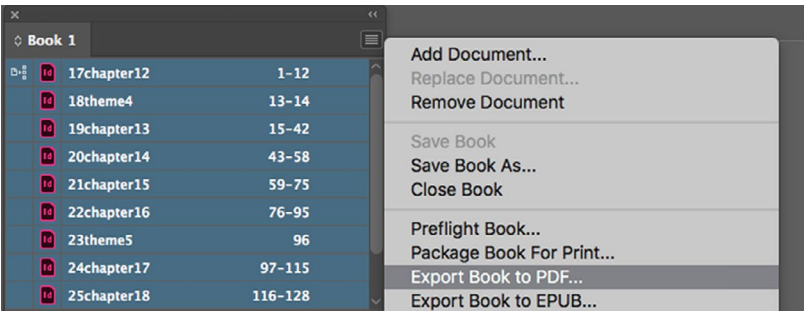
Click OK. A loaded text cursor  appears. Click or drag the loaded text cursor on a page.

STEP 14 — EXPORT YOUR BOOK

To export the entire book make use of the book function in InDesign. Go to: **File > New > Book**
Define a name and the location: the InDD folder.

Click on '+' to add all chapters of the book. All page numbers should update automatically.

Click on the right upper button and **Export Book to PDF**:



Export pdf

STEP 15 — DESIGN YOUR COVER

You will receive a designed cover. What you will need to do is to add:

- the title
- the number of the publication
- the blurb on the backcover
- the ISBN

Later, for the upload for LULU, you will also need to add a spine. For this, please refer to the cover template in the folder “cover”. Please make sure that the page size is matching the requirements on LULU. Take also care that the backcover is the first page, the spine is the second page and the frontpage is the third page.

MAKE SURE YOU UPLOAD ALL CHANGES TO THE REPOSITORY ON GITHUB.ORG BY CLICKING ‘COMMIT TO MASTER’ AND ‘SYNC’ IN THE GITHUB DESKTOP

3.4 Publish the Book

STEP 16 — ON ISSUU [NO LONGER USED]

On Issuu the publication should be set with the cover and single pages in one single PDF. After the cover follows a white page. In the case the cover is in a different file, use Adobe Acrobat to merge the PDF.

Go to <http://issuu.com/login?> and login as INC:

User:

Pass:

Click on upload: Upload your PDF and fill out the form:

- replace the automatically added title;
- add description (take this from the back cover text);
- add date;
- click Allow download (upgrade needed for this) and leave the visibility on Public and then Publish!

Now you should be able to see your publication in <http://issuu.com/home/publications>.

STEP 17 — ON LULU

For LULU you will need two PDFs:

- For the inside, we need a single PDF with single pages, without cover;
- Spreadsheet for the cover (with spine)

Also you will need to make sure all images are in black and white (and if not convert them with for instance Colorsync utility), and the first page after the title page should be white.

Go to <http://www.lulu.com/>

User & Pass

Click on Creëren / Create and choose **Print book**. On the next page choose **Premium pocketbook**, then scroll down and choose on the left **White Page**, and on the right **Royal** as the format and end by clicking **Dit boek maken** on the orange arrow.

Fill in your Title and Author(s) and leave the first options (Lulu, Amazon, Barnes and Nobles) selected.

Add the ISBN to the publication, **don't add the barcode**.

Click on Choose File and select your inside PDF, then click on **Upload**.

Click on **Make PrintReady File**.

Click on **advanced onepiece cover designer**. You will be prompted with all the necessary specs to create the PDF cover, including the measurements for the cover in total as well as the measurements of the spine. You can design it using Adobe InDesign by using the template that you can find in the cover folder.

Choose your file and upload it, click **Save and Continue**.

Fill the form with the requested info Click **Save and Continue**.

Set the price as the minimum suggested by the platform and click on review project.

Finally review your project and then click on **Save and Finish**. If you click on the blue title you should see your book for sale on Lulu.

STEP 18 — ON THE INC PUBLICATIONS PAGE

Embed the book on <http://networkcultures.org/>. In this last part we will create the page for the publication on the INC publications page.

Login to <http://networkcultures.org/>

- Go over Publications and click on Add New; fill the form with title of the book;
- Go to the Issuu page relative to the publication and copy the URL
- Paste the url at the top of the content box according to the series, check the correct category;
- Add a (small) cover image;
- Add colophon info to the Info box;
- Don't add a link in the download area
- Click on Publish, you should finally see your publication: <http://networkcultures.org/publicat>

APPENDIX METADATA

h---

Pr-id: Institute of Network Cultures

P-id: TOD Manual

A-id: 10

Type: article

Book-type: anthology

Anthology item: article

Item-id: unique no.

Article-title: title of the article

Article-status: accepted

Author: name(s) of author(s)

Author-email: corresponding address

Author-bio: about the author

Abstract: short description of the article (100 words)

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