

eText Table of Contents Spreadsheet

Preparing eText Table of Contents Spreadsheet

Revision Sheet

Release No.	Date	Revision Description
Rev. 0	10/22/08	Original (Ann Sullivan)
Rev. 1	5/23/11	Ann Sullivan – Guidelines fully updated with additional guidelines on column types, page numbering schemes, special characters
Rev. 2	6/30/11	Ann Sullivan – Updated for Release 4.4 (linkx/linky)

Introduction

The TOC spreadsheet document is intended to provide standard guidelines and best practices for preparing the Excel spreadsheet that will be used in the process of Simple eBook ingestion.

Preparing a Table of Contents Spreadsheet

PDF Files:

Make sure to follow all instructions provided in the **eText File Submission Guidelines** and **Guidelines for PDF Production** located in the CMS WIKI eText area.

Higher Ed (including International and Canada HED)

http://cmsna.pearson.com/groups/etext/wiki/afeb4/Production_Higher_Ed_Production_of_Your_Title.html

School (including ERPI and Canada School)

http://cmsna.pearson.com/groups/etext/wiki/11f1e/Production_CG_Guidelines.html

- PDF directories and files MUST follow standard naming conventions
- **PDF FILENAMES MUST NOT HAVE SPACES IN THEM**; use underscores as separators
- Alphanumeric characters only
- Duplication of filenames is not permitted. If the same page (or set of pages) is being used in an eText multiple times the file must be provided for each instance with a distinct filename.
- Files not meant to be ingested must not be uploaded to the Content Manager. This will cause an error in ingestion
- If files submitted by BU are problematic the BU will be responsible for supplying replacement files that adhere to guidelines.
- Blank pages in files will be ingested. With the exception of the first page to appear in the eText, a blank page is required where necessary in order to maintain verso/recto (two-page spread) consistency.

Table of Contents spreadsheet:

A **single** Table of Contents Spreadsheet must be provided for an eText being produced following the Simple Ingestion process. Use the file: **Excel Template – Table of Contents Spreadsheet**. This is provided in the CMS WIKI eText area:

http://cmsna.pearson.com/groups/etext/wiki/c50b9/Production_Higher_Ed_School_Spreadsheet_Workflow.html

- Single Worksheet per .xls file.
 - File must be Excel spreadsheet. File name must end with **_customtoc.xls**. Additional info should be included in the beginning of the name to help with organization. An example of an acceptably named file would be **cg_read_gr1_customtoc.xls**.
 - Standard file naming practices must be followed (no spaces, only use alphanumeric characters, lowercase recommended)
 - No Formulas can be used in any cell of the final spreadsheet.
 - Worksheet/Tab must be named exactly as shown:

Simple ebook spread-sheet
- Row 1 - **Column Heads** - **do not** edit, reorder, remove, or add additional information
- Columns (General)
 - Must follow order/naming conventions found in samples.

A	PDF FILE NAME
B	TOC ENTRY
C	PDF PAGE NUMBERS
D	START PAGE NUMBER
E	END PAGE NUMBER
F	TOC LEVEL
G	INCLUDE IN TOC
H	PAGE COUNT
I	ROLE
J	LinkX
K	LinkY
- Row 2 **This row must remain blank**
- Starting with Row 3 the information for the PDF files to be ingested will be provided. Follow these general guidelines.
 - No line breaks or tabbing/indentation in cells. Wrapped text is ok.
 - Column order must remain as listed above
 - No additional columns other may be added. If additional columns are in the spreadsheet they must be removed (not hidden) before ingestion.
 - No empty rows between rows (except for between rows 2 and 3)
 - Special and accented characters are allowed for **TOC Entry (Column B)**. Be sure to follow the **Guidelines for Authoring Special Characters** for more information.

Make sure to have the Pearson for Arial font installed and applied as font used for entire spreadsheet. See Special Characters Guidelines for more information.

Special attention should be paid to special/accented characters after ingestion to make sure they appear correctly. The Guidelines are located in the CMS WIKI eText area:):

Authoring Special Characters in eText:

http://cmsna.pearson.com/groups/etext/wiki/c50b9/Production_Higher_Ed_School_Spreadsheet_Workflow.html

- If multiple books are being ingested into the same eText all PDF files must be referenced on one TOC spreadsheet.
- Formatting or Shading in cell is permitted, however Character formatting such as bold, italic, underline will not carry over to the TOC basket in the eText.
- Data required in the columns can vary depending on what types of files are submitted for ingestion and desired appearance of TOC Basket. Be sure to reference the sample TOC spreadsheets for Single Page and Multiple Page PDF available on the eText Wiki.

http://cmsna.pearson.com/groups/etext/wiki/c50b9/Production_Higher_Ed_School_Spreadsheet_Workflow.html

Your eText team production contact can work with you to determine the correct way to format your TOC spreadsheet.

Page Numbers

- Page numbers can be Arabic or Roman.
- Uppercase and lowercase letters may be used however case should be consistent throughout eText. Do not mix upper and lower case lettering within a text. Use all upper or lowercase in an eText.
- It is recommended that if a page number is found on the page itself it should be used. It may or may not match the number indicated in the tool bar when viewing the pages in Acrobat. There are cases when this can not be done for technical/style reasons. If your etext has a complex numbering scheme or will differ from what is on the book's pages, discuss your needs with the eText Production team to determine the best plan for the project.
- Pages can have alphabetical numbering schemes. Pages can also have combined alpha/numeric schemes.
- If separators are needed a dash is recommended. Dot and space are also allowed. Keep in mind that the width of the page number entry box is limited and longer page numbering schemes may not be completely viewable within the box. User will have to move cursor to the left in order to see full page number depending on its length.

Column Name	Column Description
PDF FILE NAME (COL A)	<ul style="list-style-type: none"> • Every PDF file being submitted for ingestion must be listed. • Files can contain single page or multi page. • Do not list or upload files that are not supposed to be ingested into eText • Filenames must NOT contain spaces. Only use standard alphanumeric characters in filenames. Do not use accented characters. • Filename listed in spreadsheet must match file being uploaded on Content Manager or ingestion will fail.
TOC ENTRY (COL B)	<ul style="list-style-type: none"> • Data in this column will populate the TOC Basket. Text entered will display as entered unless setting in Include in TOC (column G) is no. • If TOC Entry column is empty and include in TOC column entry is yes an error will occur during ingestion. • Etext must have at least one TOC entry however each page or file is not required to have a TOC entry. • Make sure to pay extra attention when using special or accented characters. See above for additional information about entering special or accented characters in spreadsheet. • Make sure to have the Pearson for Arial font installed and applied as font used for entire spreadsheet. See Special Characters Guidelines for more information. • Formatting such as bold, italic, underlined characters are not supported in the TOC basket. Formatting/shading may be used in spreadsheet to make editing easier but it will not carry over to basket. • A limited number of super and subscript characters are supported for TOC Entry and must use Arial for Pearson font. See Special characters Guidelines for more information. To determine if character is supported you will need to look at the Pearson for Arial font to see if it is listed. • Maximum number of characters in a single TOC entry is 250.
PDF PAGE NUMBERS (COL C)	<ul style="list-style-type: none"> • See Page Number section (appears before table) for more specific information regarding page numbers. • This represents the range of pages in the PDF file and can cover different page ranges within a single file. For example a pdf file may have pages numbered i to v followed by 1 to 10 • Page ranges must match the order they appear in the PDF file and should be continuous. • Page ranges must be separated by a comma. Use "to" to represent a span of pages. A dash will cause an error during ingestion. See sample values for examples • This column only needs a value in rows that the PDF FILE NAME column has a value. • If a multi page PDF file has different page numbering schemes the changes in page number types must be separated by commas (i.e. i to v, 1 to 5) <p>Sample Values:</p> <p>i to v, 1 to 4, 4A, 4B, 5 to 10, 10A, 10B, 11 to 15</p> <p>3</p> <p>1 to 100</p> <p>R1.001 to R1.100</p> <p>A-01 to A-10</p>
START PAGE NUMBER (COL D)	<ul style="list-style-type: none"> • See Page Number section (appears before table) for more specific information regarding page numbers. • This is used to determine the start page number of a TOC ENTRY (Col B) • This field has a dependency on INCLUDE IN TOC (Col G). If value is yes than START PAGE NUMBER must be provided.

Column Name	Column Description
END PAGE NUMBER (COL E)	<ul style="list-style-type: none"> • See Page Number section (appears before table) for more specific information regarding page numbers. • End page is required for any row where PDF File Name (Col A) is not blank (if user has provided value in PDF PAGE NUMBERS then it is not required at all) • End page number is mandatory if TOC entry is having role as frontmatter, chapter or rearmatter
TOC LEVEL (COL F)	<ul style="list-style-type: none"> • This determines the level/hierarchy at which a TOC Entry should be placed. This requires data whenever INCLUDE IN TOC is "yes". • Primary TOC entries should have TOC Level of 1. Corresponding sub levels of 2, 3, and so on. • The value of the TOC LEVEL for any row can be equal to, 1 level less than, or 1 level greater than preceding TOC ENTRY. Its difference can not be 2 levels or more unless the entry is the beginning of a new chapter or section. . (This logic violates if a new chapter starts) • TOC entries will appear nested within any entry which precedes it and has a LOWER level number. For example a TOC ENTRY with a level of 2 will be nested underneath its preceding entry if its level is 1. If the preceding entry level is the same then the entries will appear on the same level. • It is recommended that Basket entries go no deeper than 4 levels for optimal formatting results. Manual changes can be made to the display of levels if larger number is needed. Discuss your needs with eText team member.
INCLUDE IN TOC (COL G)	<p>The purpose of this Column is to indicate whether a TOC ENTRY value needs to be visible in the TOC Basket. The two options in this column are YES and NO.</p> <p>YES = TOC ENTRY text will appear in TOC Basket</p> <p>NO = TOC ENTRY text will not appear in TOC Basket</p> <p>This column may not be left blank</p> <p>NOTE: When INCLUDE IN TOC value is "no" for a TOC entry, be sure to include the following information for that entry:</p> <ul style="list-style-type: none"> ▪ Either "PDF Page Number" column should be filled <p>OR</p> <ul style="list-style-type: none"> ▪ Both the "Start Page Number" & "End Page Number" columns should have page numbers entered <p>AND</p> <ul style="list-style-type: none"> ▪ Page Count column should be filled
PAGE COUNT (COL H)	<p>Total number of pages in PDF file listed in Column A. If page number does not match what is in file then ingestion will fail. This column is mandatory if PDF FILE NAME (Col A) has data in it.</p>

Column Name	Column Description
ROLE (COL I)	<ul style="list-style-type: none"> Accepted values for this Column are: chapter frontmatter rearmatter The values for this column may be expanded as eText development continues. A minimum of one TOC ENTRY must have a role of Chapter assigned to or an error will occur during ingestion. Use chapter as the role for any entry in TOC that functions "like" a chapter opening. Chapter, Part, Section entries can have a role of chapter assigned to them. Use frontmatter as the role for any entry that functions as an opening section within the frontmatter of the etext. Preface, Acknowledgements, About the Author are examples of entries that can have a role of frontmatter assigned to them. Use rearmatter as the role for any entry that functions as an opening section within the rear or backmatter of an etext. Appendix, Index, Glossary are examples of entries that can have a role of rearmatter assigned to them.
LinkX (COL J)	<p>With the June 2011 4.4 Release two new optional columns, LinkX and LinkY, have been added to the CustomTOC spreadsheet, after the "Role" column. These columns enable entry of X and Y page coordinates, measured in PIXELS from the upper left corner of the page, for a link from the Table of Contents to a particular location on an eText page. Since the default behavior on initial entry into the eText is to display the page so that it fills the available content frame, use of an "X" (left/right) coordinate may not be immediately apparent, but a "Y" coordinate (up/down) should direct the viewer to a vertical location on the page. If the user is zoomed in to a greater magnification than "fit frame", the effect of an "X" or "Y" coordinate may be more apparent.</p> <p>When determining the X/Y coordinates make sure to measure from the trim box or crop marks.</p>
LinkY (COL K)	<p>Adobe Acrobat Professional can be used to determine the x/y and w/h coordinates for the pages that require audiotext links.</p> <p>Erik Unhjem has also recommended the following tools can be used for determining X/Y position The free Firefox add-on is MeasureIt (https://addons.mozilla.org/en-US/firefox/addon/539/)</p> <p>Pixel Ace (http://download.cnet.com/Pixel-Ace/3000-2247_4-10962155.html?tag=mncol) and Netzwelt Webtools 1 (http://download.cnet.com/Netzwelt-Webtools/3000-10247_4-10819862.html?tag=mncol) do essentially the same thing and are both free downloads.</p>

Spreadsheet Template & Examples

A blank Table of Contents spreadsheet and sample spreadsheets are available in the CMS WIKI eText area:

http://cmsna.pearson.com/groups/etext/wiki/c50b9/Production_Higher_Ed_School_Spreadsheet_Workflow.html

- **Excel Template – Table of Contents Spreadsheet**– Start with this Excel spreadsheet to create your title's data.
- **Sample TOC spreadsheet - Single Page PDF**
- **Sample TOC spreadsheet - Multiple Page PDF**