Content Conversion: QA and Problem Resolution

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Reviewing Converted Digital Content

First Things First: Review Your Own Specifications

- Cover and front matter
- Table of Contents (TOC), List of Tables (LOT), List of Figures (LOF)
- Chapters, sections, and other hierarchy
- Sidebars and boxed text
- Tables and figures
- Math
- Inline semantic elements
- Cross references and footnotes
- Hyperlinks and URLs
- Special characters.
- Fonts (e.g., if you’ve chosen to embed font files in a converted EPUB).
- Back matter

Tip: Don’t just review your in-house specifications. Make sure that you review the exact project specifications documentation you provided to your conversion partner. Ensure that you are comparing “apples to apples” as you review your converted content.

Start Here…

- Check the files.
- Review the written specifications as provided to your conversion partner.

Tip: Your conversion partner has already completed their own internal QA steps including running automated scripts and working through quality criteria checklists. Under most circumstances, your conversion partner will have already run the official epubcheck tool on your files, but it’s always a good idea, and reassuring, to see the results for yourself.

Did you get all of the files you expected?

Have you accounted for all image files? (Especially if you have a complex book that may need to switch between high and low resolution images based on device.)

CAUTION: If you know what you’re doing, you can disassemble the EPUB and manually check each file – the NCX, OPF, CSS, Images, XHTML, JavaScript, etc. But this can be dangerous. It is not a good idea to poke around inside of an EPUB with Sigil or Calibre, or any other EPUB editing tool. Some of these tools can make changes you did not intend just by importing the file, or opening and closing the file.

If you’ve chosen to have your conversion partner do just the primary EPUB conversion and wish to customize the EPUB further for each platform, or generate a KF8 file, use Amazon’s Kindle Previewer and/or KindleGen tools instead of Calibre. (Understand the working details...
about how KF8 files work, though. KF8 files generated with Amazon Kindle tools contain source EPUB, KF8 files, AND Mobi 7 content all in one package).

Double-check any fixed layout enhanced EPUB2 iBooks on all target devices. Despite the fact that both Kobo and Nook also support enhanced EPUB2 books, there is still a chance that image-based dimensions may be incorrect. Further, Nook does not use fixed layout XHTML as the basis for fixed layout children’s books or cookbooks.

**Load Delivered eBooks on Each Target Device**

- Start with [Adobe Digital Editions](https://www.adobe.com/products/digitaleditions.html) or [Readium](https://readium.io/)
- **Do not try to skip this step by spot-checking!**
- Remember: “You can’t get away with not scrolling through the whole thing.” @noteon

**Tip:** Load the books up on Kindles, Nooks, Kobos, iPads, and iPhones… every target reading device to make sure everything works and appears the way as expected. There’s no automation for this step. You have to look.

You may also want to consider loading the books on the [Azardi](https://azardi.com) web-based EPUB3 reader. Azardi has great presence outside North America, for instance, but we don’t always think to check the apps that aren’t right in front of us every day.

**Use a Checklist**

Build your checklist by category:

- Reader features
- Front matter
- Text
- Images
- Tables
- Special Features
- Back Matter
- Metadata.

**Tip:** What should you check?

- Check the ISBN, and then check it again. Make sure it’s not the print ISBN.
- Are all the front matter objects accounted for? (Extracts, Dedications, etc.)
- Do all of the reader features or reader App features work as expected?
- Do images display properly?
- Do tables display properly?

**Reviewing Digital Content: Reader Features**

- Is the cover correct?
• Is the overall layout correct?
• Do all of the navigation features work?
• Is the hierarchy correct?
• Do all hyperlinks work?
• Do all “views” work?

**Tip:** What is a view?

Views change based on the orientation of your reader or tablet. For example, iPads support portrait and landscape, as do most other tablets and smartphones.

Hyperlinks include TOC, index, cross references, URLs, DOIs, citations, and whatever else you may have set up as a link.

**Reviewing Digital Content: Text**

• Heading levels
• Running text
• Fonts
• Justification and word spacing
• Hyphenation
• Special Characters
• Lists
• Sidebars/boxed text
• Pull quotes
• Footnote and reference text formatting
• Inline semantic formatting

**Tip:** Is all the text present? Does the text display in the correct order?

Look for everything you would check in a print publication. It all applies. (e.g., line turnovers, crashing text, alignment, page numbers.)

Don’t forget to check dingbats…

**Reviewing Digital Content: Images**

• Are all the images present?
• Are images sized correctly?
• Are images placed correctly?
• Are images skewed, blurry, indistinct, or pixelated?
• Are images displayed in the correct resolution?

**Tip:** If you are working in iBooks on an iPad, images may split inappropriately across pages. This is a bug. You can usually prevent this by setting the book to display “full screen” via the user settings **Theme > Full Screen** option.
Reviewing Digital Content: Tables

- Headers
- Repeating rows (and repeating columns, if present)
- Cell text formatting
- Table notes
- Borders
- Colors
- Screens
- Page breaks
- Captions

Reviewing Digital Content: Special Features

- Display and inline math
- Chemistry
- Code listings and poetry
- Screenplay formatting

Reviewing Digital Content: Metadata

- Identification
- Classification
- Retail

Tip: Look for the following details:

- Identification: Copyright, Publisher, edition, ISBN, author, LIC, if it’s an identifying number, check for it.
- Classification: Used for both library cataloging and retail purposes.
- Retail: pricing and classification (depends on whether or not retailer goes by LIC or BISAC categorization).
Reporting Issues for Corrections

Have a System

- Record
- Review
- Compile
- Correct
- Report
OPTIONS:

- Vendor provided system
- In-house tools
- Cloud based tools

**Tip:** Even a Wiki is better than back and forth email. Set up your own Bugzilla or Jira implementation and track notes there so you can generate detailed reports that you can send to your conversion partner.

**Work with Your Conversion Partner to Resolve Issues**

Communication plan:

- Stakeholders
- Issue reporting
- Issue review status meetings
- Workflow between publisher and conversion partner to resolve issues
- Always be very specific in communication
- Always follow up in writing
- Ask for written confirmation of your follow up (shows that there is an understanding between the publisher and conversion partner, or provides the opportunity to further clarify any lack of understanding, or misunderstanding.)

**Records and Issues Reporting**

**RECORD:**

- A description of the problem
- What you expected
- Can you recreate?
- Device user settings
- How you think the problem should be resolved
- How the issue is successfully resolved.
- If there are multiple issues, it is better to provide a report containing the detail of all issues at once.
- Minimize email back and forth where possible (put the where’s and when’s and frequency in your communication plan).
- Publishers and conversion vendors can use officially submitted issue report as criteria for establishing the status of individual issues, and a place to provide approval of resolved issues. When everything on the report is resolved and approved, you are officially done.
Resources

- #eprdctn Twitter hash tag.