

# INFOTEC: requirements for JRP/Biblio connection

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## The main change to the current workflow

For the biennium (2023-2024) the Excel file uploaded in Biblio will be transferred to JRP using a set of APIs. The Author Unit can then access his/her dashboard and add the data necessary to PP Publications in order to finalize the requests of Publishing services.

## Publishing service requests

There are several cases of Publishing service request to consider:

### As first print

1. **Sub-Case 1** - Creation of a pre-work request, for pre-planning, ready in JRP once uploaded the Publishing Plan (PP in Excel) in JRP
  - a. The Pre-request can then be integrated by PUBL in case of ISBN assignment. This assignment takes place on request through the JRP.
  - b. The Pre-request becomes a Work request for production at the time of Full-edited manuscript provision
  - c. In case a Pre-request is not transformed into a production request (e.g. a language version not produced), the record is archived automatically → **but when ? rules to be defined with PUBL**
2. **Sub-Case 2** : The request is entered by the applicant in JRP outside the PP (may need ISBN or not)
  - a. The request is transferred to Biblio only if concluded (never in draft status) in JRP with also file attached (manuscript Full-edited or PDF file ready for printing)

### As reprint

3. A record for that Work already exists in JRP and Biblio too
4. The requester selects the record in Biblio and requests for a reprint, without changing any information (including the PDF).
5. In case the requestor changes data (including PDF) then a first print record is created (see above case 2)

## Approvals

It is assumed that at each PRODOC unit there is Production manager who is in charge of approval at different levels

6. **Work** - Confirmation or rejection with reason: in this case the work is archived both in Biblio and JRP
7. **Edition** - Confirmation or rejection with reason: in this case the work is archived both in Biblio and JRP
8. **Impression** - Confirmation, it is to start the production

## ISBN creation and assignment

9. **Premise:**
  - a. PUBL once received the PP in Excel loads it in Biblio
  - b. Then a Biblio API will synchronize (send) all entries loaded in Biblio by PUBL in JRP
10. **Given the general rules about ISBN**
  - a. The ISBN cannot be created and assigned in Biblio until the edition to which it must be associated is approved (by the production manager)
  - b. In the event that the requester decides to cancel a publication to which an ISBN has already been assigned, this ISBN can only be recovered if the Onyx metadatas have not already been sent. In case the ISBN is lost
  - c. In case of deletion of a publication with ISBN, the record is saved in JRP as "Deleted" and can no longer be edited.
  - d. In Biblio the file is classified as "Abandoned" but remains available in an area of "Publications canceled by the applicant".
11. **Scenario: The Author Unit requests that an ISBN be assigned for one of titles indicated in PP (excel) and loaded/visible on JRP**
  - a. The requester open in JRP his/her dashboard
  - b. The requester identifies the title for which he/she must request the ISBN
  - c. The requester can ask for ISBN for one Work (and related editions) at the time
    - i. The requester has a link on the entry mask leading to an Intranet form ([see form](#)).
    - ii. The requester fills-in the form and send to PUBL
  - d. PUBL receives the request via email, then goes to Biblio, looks for the title for which the ISBN was requested

- e. PUBL checks eligibility.
  - i. In case of refusal, a message PUBL sends a Mail goes to Biblio and archive the request
  - ii. **If the request is accepted PUB creates the ISBN (manually as described [here](#)), the number is returned to the JRP via API and the user is informed with an alert on his JRP home page**

## Elements of the new workflow

### Product Templates in Biblio

1. Product Templates in Biblio (one for each ILO Product type) are used for:
  - a. Minimize the data entry in case of manual entry in Biblio
  - b. Tool to implement the link JRP/Biblio: it is a matter of merging the data coming from outside via API (JRP) with those pre-set for any Type of Product in Biblio (as dummy file / entry).
  - c. [See the list of Products and associated template](#)
2. How does it work:
  - a. From JRP data sets are sent to Biblio via the API. The data set also contains the reference to the Product Type
  - b. Biblio duplicates the dummy file / entry already in Biblio for that type of product and puts together the preset data with that of the flow.
  - c. Save the data set and create a Work\_ID which is sent back to JRP via API.
  - d. Note that in JRP the requester can select for a Work both editions (Digital, Print) and up to 5 languages. Editions and links to language version are passed to Biblio via API

### Product Classifications

3. A harmonization of the ILO Product Classification in BiblioLIVE will be required.
  - a. This should mostly just be minor edits to the existing groups in BiblioLIVE.
  - b. This process will be handled manually by the BiblioLIVE super user once JRP to BiblioLIVE integration is up and running.
4. At the beginning (**phase 1**) the alignment of the ILO Product Classification In JRP with that in Biblio will be maintained manually in JRP by the super user
  - a. In the future (**phase 2**) an automatic data transfer is planned from Biblio to JRP

### Contacts and Role Assignments

5. Excel contacts upload of all JRP contacts will be done to prepopulate BiblioLIVE using the Bibliographic uploader contacts template (**Phase 1**)
  - a. **At phase 2** there will be an automatic synchronization with JRP which in turn is synchronized with IRIS. (INFOTEC verificherà gli aspetti legali presso ILO/JUR )
6. When the JRP sends a request, BiblioLIVE will be checked to see if the contacts exist. If they do then OK, if not then the contact will be created.
7. Role and contact will be sent across to BiblioLIVE with the JRP request to set up the role assignments in BiblioLIVE.
8. Roles will be maintained manually in JRP and will be maintained by the BiblioLIVE super user

### Calculator

9. It is a recursive operation, it can be done at any time in JRP even after the work request submission but not after the impression approval in JRP (the entry masl on JRP is not accessible at that time)
10. The calculator is used by requester to the self-calculation estimation cost at the time of entering the request
  - a. Useful for preparing the budget
  - b. Unit's FCO can keep the spending on publications under control
11. **Calculation is based on different parameters in case of PP and non-PP Products:** [refer to this file](#) for rules related to product types. See at the end of the file the specifications of the cost for:
  - a. Print [is per page as from this table](#)
  - b. Design of Layout style (cover and inner)
  - c. Typesetting costs
  - d. Production of diagrams and figures
12. **There is also a simplified version of the calculator for Direct print and Reprint services**
  - a. In this case it is based on the exact no. of page, so it is applied the rule per page as from this table
13. No transferring of data JRP to Biblio

## Multiple language handling in Biblio and in JRP

### Premise

14. Since in Biblio the structure of a Work request is the result of a hierarchical tree: "Work/Edition (Print, PDF ...)/ language", to transfer the work request from JRP to Biblio the best thing to do is to have the same structure in JRP: that is "Work/Edition/language",
15. It means one record per language. In this mode the two platforms are able to communicate easily.

### How it will work in JRP

16. The user inserts in the JRP a request in EN, but he knows he wants to produce in short time the FR and ES version.
17. The entry mask allows to generate on purpose (and not in automatic) more requests at the same time depending on the languages selected (the user has to say "yes, generate a request for each language"). In this way the user is aware of having inserted more requests at the same time and more requests are ready to ask for ISBN (if it is the case).
18. How it will work from the user's (and machine's) point of view.
  - a. For example: the requester enters a work request (as one record) in EN (it will be marked as "original language", as "Father") in JRP and indicates that the versions in FR and ES are also planned (they are children of that EN father).
  - b. There will be the choice Yes, No for the question "Do you want to insert one entry per language, right now?"
  - c. If yes the JRP produces 3 records, one for each language, already linked together. So the user will now have 3 records and then three "buttons" to load, at the moment, or in the future, the 3 manuscripts and data around it, one for each language.
  - d. It should also be considered the case that the requester adds a language later than the 3 already entered. In this case, if we also want this work request to be linked to the other 3, the requester must start from the "Father" that is the version in EN.
    - i. The solution for that: in JRP the list of work requests shows the Father (original language) and the other linked languages (as translations) directly in the list

## PRODOC/DESIGN: new specific workflow

19. Since DESIGN Unit is new to the use of Biblio, it has been set a specific workflow,
20. In brief:
  - a. All design requests are received through JRP as a request "to be called back" after the selection of a service from a list of services
  - b. All design requests are firstly processed by the design manager to see if it is possible to create internally depending on workload.
  - c. If can be processed internally, the request is loaded in Biblio by the project manager
  - d. If not the design manager sends to PPM for outsourcing – PPM contacts the client and documents/manages the request
  - e. All documentation concerning the job produced by either the design manager or a project manager is uploaded in Biblio
21. For more detail [see details of new workflow](#)

# Methods and rules for JRP/Biblio connection

[Description document by Virtsales](#)

## In short

1. **In short: the idea is to keep the two environments separate (Biblio, JRP), Biblio does not need to know how the JRP is made. This is because it is always JRP who "pulls the data", and it is an advantage now and in the future (if JRP changes it should have no effect on Biblio).**

## Alan's generalization

2. The JRP will be the "consumer" system. This means that JRP will call BiblioLIVE APIs for all operations including reading and writing of data.
  - a. For write operations, this will generally be on demand for adding or updating specific records.
  - b. For read operations, this will be both on demand for JRP requesting specific information and also be periodic polling where JRP is checking for updates to certain records/dates/etc.
3. BiblioLIVE will be the "provider" system. This means that BiblioLIVE will provide the necessary suite of APIs and it is up to JRP to call these APIs to read and write data for its operations. BiblioLIVE will not call JRP APIs and BiblioLIVE will not communicate with requestors directly.
4. Similarly requestors will only have dealings directly with the JRP and not BiblioLIVE.
  - a. All emails to requestors will come from the JRP. No emails will be sent from BiblioLIVE to requestors.

## Details

5. The connection is made through JRP extracting ALL the data from the BiblioLIVE API with two different methods:
  - a. **On demand:** when the requester logs in his dashboard on JRP
  - b. **Periodically in the background** all active data are pulled: **time to be defined.**
    - i. Only data belonging to requests in progress, therefore NOT the archived ones
6. Both methods can be applied.
7. In fact, the method 5b is applied when changes occur in Biblio. It would be for JRP to call on or more read APIs on BiblioLIVE to get this data on demand by polling periodically.
8. Concerning changes on JRP for: Cover title, No of copies, No.of pages. Pub date
  - a. it will not be possible for requestors to change those data once the Edition and Impression are approved in Biblio (PRODOC is in production). These two approvals are recorded in JRP and consequently the edition of the record is blocked in JRP
  - b. Only PRODOC can change these data on Biblio on demand of requester
9. It will be always the JRP sends out email when it is necessary to inform the requester of changes are made by PRODOC in Biblio, typically in case of:
  - a. ISBN assigned (the data is transferred to JRP with method 5b)
  - b. Budget proposal ready to be approved (mail with the link of the document in DAM once the document has been uploaded by PPM in a special DAM directory. The URL is previously transferred to JRP with method 5b)
  - c. The request is rejected
  - d. The request is approved (the data is transferred to JRP with method 5b)
  - e. Change of Pub date made by PRODOC (the data is transferred to JRP with method 5b)
  - f. Status during productions to be decided which ones (during JRP design)

## Data flows

With reference to the number associated with the API in the [diagram](#), below are the data flows from JRP to Biblio and vice versa

### Four requests of Publishing services

1. **Request of Publishing services for print and non-print products (with or without ISBN)**
  - a. **API 5 - Directly inserted in the JRP by requester (ILO Unit)**
    - i. Data (including JRP ID) from JRP >Biblio ([metadata transferred Biblio/JRP](#))
    - ii. If Operator confirms the request: IDs creation for Work and Edition in Biblio
      1. Biblio IDs from Biblio > JRP
    - iii. If Operator asks for modification
      1. Data from Biblio > JRP (reason why via JRP)
    - iv. If Operator rejects the request: Work/edition archived
      1. Data from Biblio > JRP (reason why via JRP)
  - b. **API 1 - First inserted in Biblio (by PUBL or DESIGN) and then visible to the requester, with rights to insert more data, on the JRP**
    - i. Data (including Biblio ID) from Biblio > JRP ([metadata transferred Biblio/JRP](#))
    - ii. ID creation in JRP: JRP ID from JRP > Biblio
2. **Quick print request (for print product with or without ISBN)**
  - a. **API 5 - Directly inserted in the JRP along with a PDF ready for the print**
    - i. Data (including JRP ID) and binary file from JRP > Biblio
    - ii. ID creation in Biblio: ID from Biblio > JRP
3. **Requests for DESIGN services - First inserted in Biblio and then visible on the JRP**
  - a. **API 1 - First inserted in Biblio (by DESIGN) and then visible on the JRP**
    - i. Data (including Biblio ID) from Biblio > JRP
    - ii. ID creation in JRP: JRP ID from JRP > Biblio
4. **Reprint request (with or without ISBN)**
  - a. **Search API - For Searching in Biblio archive of printed products, then a duplication of a record occurs in Biblio**
    - i. Data (including Biblio ID) from Biblio > JRP
    - ii. ID creation in JRP: JRP ID from JRP > Biblio

### API during production process

5. **API 3 - PPM set a new delivery date or accept that proposed by requester**
  - a. Planned delivery date from Biblio > JRP
6. **API 8, 9 - Cost estimate from PPM: Budget Proposal (BP) approval and PR provision**
  - a. PPM send the BP
    - i. Data from Biblio > JRP (binary file + date)
  - b. Requester can:
    - i. approve and send PR number data from JRP > Biblio (PR number + date)
    - ii. Reject , data from JRP > Biblio (status + date + reason why)
7. **API 11, 12 - PDF for printing from Biblio to JRP**
  - a. PPM, PUBL, DESIGN
    - i. Data (DAM URL + date) from Biblio > JRP
    - ii. As alternative: once an operator has uploaded a file in the Printing directory the operator send the email through DAM itself with the DAM URL of the file
8. **API 13 - PDF ready for printing from JRP to Biblio (This API is under discussion, it could be not necessary in case PMSERV starts using Biblio for printing management)**
  - a. Author units



- b. Data ( binary file in DAM + date) from JRP > Biblio

**9. API 5 - Tracking of production steps**

- a. Status of work
  - i. Data from Biblio > JRP (status + dates) for :
    1. Copyediting
    2. Proofreading
    3. Layout approval (Cover or inner)
    4. *(these list has to be confirmed)*

**10. API 5 - Publication delivery date modified (during production and before)**

- a. PRODOC change the date - All scheduling is recalculated
  - i. Data (dates) from Biblio > JRP

**11. API 5 - Cover title modified in JRP (NEVER once impression approved)**

- a. Author unit change the title in JRP
    - i. Data from JRP > Biblio
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## Migration of JRP records in Biblio

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1. There are currently 2 separate collections of records: one is already in Biblio the other in JRP.
2. In order to start and operate the connection it is necessary align both systems transferring the JRP records in Biblio
3. For JRP, the migration concerns only and exclusively records (requests) which have not yet inserted manually in Biblio
  - a. **In order to avoid duplications, there will be NOT ANY automatic migration of JRP into Biblio at the T=0 of the connection. It will be done manually**
1. The JRP will be cleaned up and it will be empty waiting the transferring of data from:
  - a. Biblio: All the PP items (PUBL) in the current biennium, usually ISBN items
  - b. All the non-ISBN items are already loaded into Biblio manually along the time (current biennium) by PPM.
2. The above record will populate two different sections of the JRP (to be confirmed, but indicatively)
  - a. Requests in production
  - b. Request in planning (PP)

## Batch load files to develop

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As part of the manual data feeding in Biblio (see Contacts mentioned above), there are two batch upload files to develop in accordance with the rules established by the existing batch load file provided by Biblio ([see batch load file here](#)). These files will be used to manual insertion of the following collections:

1. **All IRIS contacts and related data (INFOTEC):** contact name, suramane, email and IRIS ID . It includes a tool to transform the excel file, received/extracted from IRIS, into the batch file that can be loaded in Biblio. **(phase 1)**
2. **Print requests from RODIS (INFOTEC):** Excel file for batch loading of RODIS requests including a tool to transform the excel file, received from RELMEETING, into the batch load file that can be loaded in Biblio. **(phase 1)**

# JRP: changes and new features

In green new features - [see wireframes](#)

1. **New data entry page for biennial Publishing Plan publication (ISBN Publications) : addition of**
  - i. Some data are already precompiled when the Publication has been already inserted by PUBL
  - ii. ISBN request as a link to an Internet form
  - iii. Calculator
2. **Modifications to the current data entry page (NON-ISBN publications)**
  - a. Production parameters (Size, colors...) must be removed from the entry mask (remain only for some promotional materials)
  - b. Some box is not present depending on Product type
3. **Creation of more records, linked together, starting from one entry having indicated more languages/editions** ([see above Multiple languages handling in JRP](#))
  - a. This feature is valid for PP and non-PP publications
4. **View page:** available after the submission of data.
  - a. This page can also contain, if existing, the related editions and language versions, and any other linked publication
  - b. Link to download the record in Excel**
5. **Download all entries as Excel file**
  - a. This feature is available on page listing the request in planning and in production
6. **Array with ILO Product types and associated Product template in Biblio**
  - a. It is necessary to have in JRP the ID of the Template in Biblio
  - b. This information has to be managed autonomously by PRODOC
7. **Modifications to the current page listing works: a new feature must be designed and implemented**
  - a. The list can also show related items: same title and related language versions (editions) in a hierarchical manner
8. **Creation of a page of "Archived works" for listing products already printed, or not produced**
  - a. The Archive contains printed or never produced products
  - b. On this page the requester starts to ask for reprinting, two elements on the page:
    - i. API search mask to query Biblio
    - ii. Ready made list from Biblio
  - c. The use of API Search mask produces a list of products from Biblio
  - d. A product can be selected to ask for reprint
    - i. An entry mask opens to insert some metadata
9. **Publications from PP not sent in production at the predefined date are automatically archived**
  - a. Archived in Biblio, no records on JRP
10. **Cost calculation**
  - a. recursive operation, it can be done at any time in JRP even after the work request submission but not after the impression approval in JRP
  - b. **No transferring of data JRP to Biblio**
  - c. There are two types of calculator
    - i. **Calculation is based on different parameters in case of PP and non-PP Products:** [refer to this file](#) for rules related to product types. See at the end of the file the specifications of the cost for:
      - Print [is per page as from this table](#)
      - Design of Layout style (cover and inner)
      - Typesetting costs
      - Production of diagrams and figures
    - ii. **There is also a simplified version of the calculator for Direct print and Reprint services**
      - In this case it is based on the exact no. of page, so it is applied the rule per page [as from this table](#)
11. **Page to configure controlled vocabularies**
  - a. New product type (never delete)
  - b. Change of a Product type name

- c. Addition of Biblio ID to JRP product type in case of new Product type
- d. Addition and change (never delete) of Suppliers
- e. Addition and change (never delete) of PRODOC people with roles
- f. Management of cost average content per product type (from Raphael)