Virtusales: requirements for JRP/Biblio connection

Requisites summary

No.	Things to do	Comments & notes	Phase
1	API setting : from 1 to 11	For explanation see below	1
4	Merging of data from JRP with Product Templates in Biblio	Use of Product Templates (Loaded in Biblio by PRODOC) - see below	1
5	Contact and role assignment	For explanation see below	1
6	Copyright year preset to the current year		1
7	Add a field in Impression/extras for “Cover: choose printer”	It is like “Equipment”	1

The JRP / Biblio connection in general

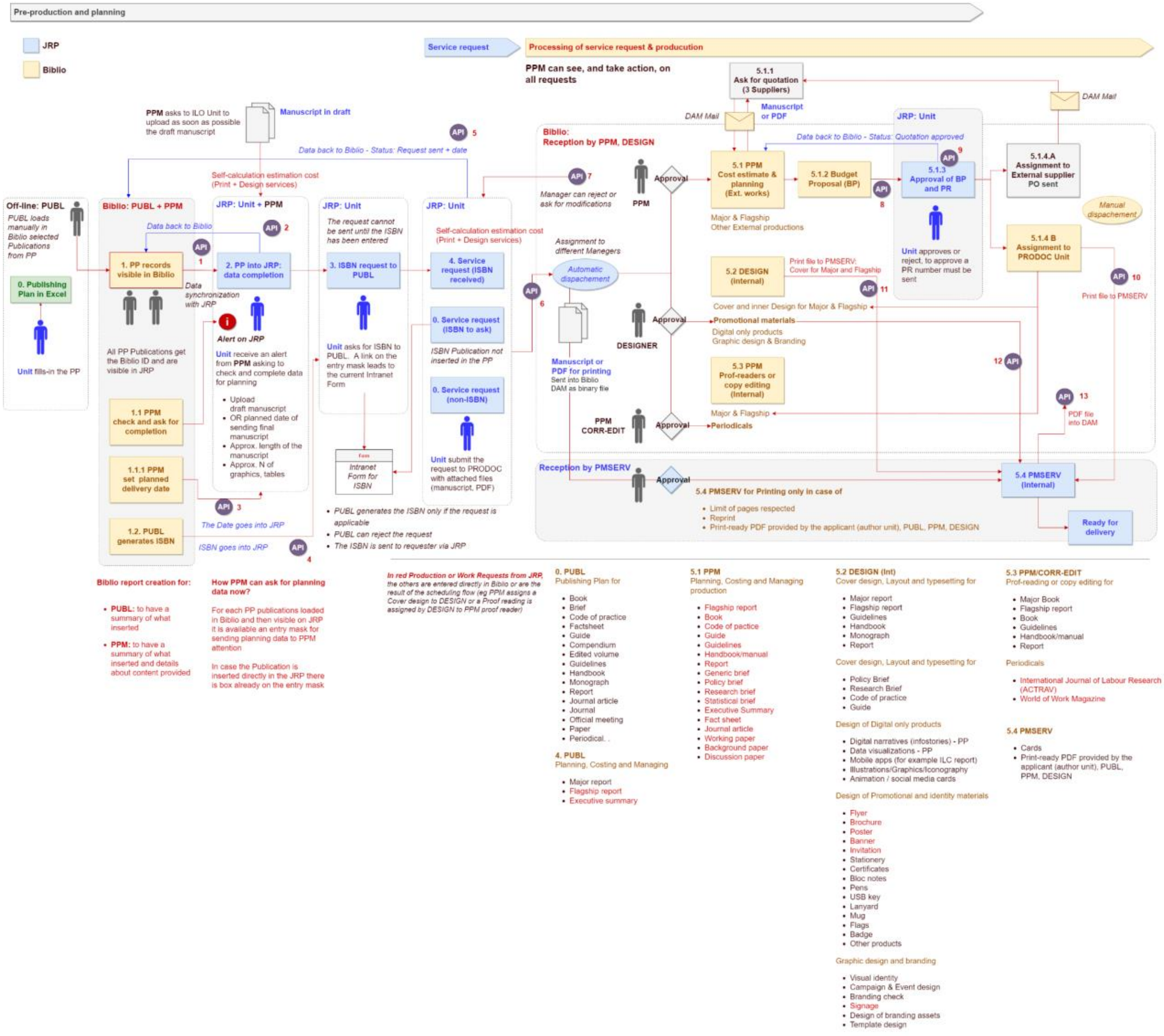
For the JRP / Biblio connection two elements are involved:

- **APIs** to establish the connection and allow the data flow between JRP / Biblio and vice versa
- **Improvement of the current JRP** implementation for both data logic and UX

Referring to the new workflow, the JRP / Biblio connection is based on 4 levels (here in sequence):

1. **Level 1: Creation of a request of Publishing services, three cases**
   a. PUBL inserts the biennial Publishing Plan in Biblio (JRP is synchronized) at the beginning of the new biennium (work request is in pre-planning stage)
   b. The author unit uses JRP to finalize requests in pre-planning stage or to enter new requests in Biblio
   c. The request is entered directly in Biblio by a PRODOC operator (DESIGN or PMSERV)
2. **Level 2: Sending the request via JRP and receiving it in Biblio:**
   a. Data from JRP to Biblio - For the metadata mapping PP/Biblio/JRP: refer to this Excel file
3. **Level 3: Production management through Biblio**
4. **Level 4: Communication between PRODOC and the requester , two cases**
   a. **During work request creation in JRP and submission**
   b. **During production**
      i. In both case Data from Biblio to JRP and vice versa, two modes:
         1. Through automatic triggers in Biblio (no manual actions)
         2. Through specific actions, typically via DAM

PNG version - PDF version


Pre-production and planning
JRP
Biblio
Service request
Processing of service request & producution
PPM can see, and take action, on all requests
PPM asks to ILO Unit to upload as soon as possible the draft manuscript
Manuscript in draft
API 5
Data back to Biblio - Status: Request sent + date
Self-calculation estimation cost (Print + Design services)
Off-line: PUBL
PUBL loads manually in Biblio selected Publications from PP
0. Publishing Plan in Excel
Unit fills-in the PP
Biblio: PUBL + PPM
Data back to Biblio
API 1
1. PP records visible in Biblio
All PP Publications get the Biblio ID and are visible in JRP
1.1 PPM check and ask for completion
1.1.1 PPM set planned delivery date
1.2. PUBL generates ISBN
JRP: Unit + PPM
API 2
2. PP into JRP: data completion
Data synchronization with JRP
Alert on JRP
Unit receive an alert from PPM asking to check and complete data for planning
Upload draft manuscript
OR planned date of sending final manuscript
Approx. length of the manuscript
Approx. N of graphics, tables
API 3
The Date goes into JRP
ISBN goes into JRP
API 4
JRP: Unit
The request cannot be sent until the ISBN has been entered
3. ISBN request to PUBL
Unit asks for ISBN to PUBL. A link on the entry mask leads to the current Intranet Form
Intranet Form for ISBN
JRP: Unit
Self-calculation estimation cost (Print + Design services)
4. Service request (ISBN received)
0. Service request (ISBN to ask)
ISBN Publication not inserted in the PP
0. Service request (non-ISBN)
Unit submit the request to PRODOC with attached files (manuscript, PDF)
PUBL generates the ISBN only if the request is applicable
PUBL can reject the request
The ISBN is sent to requester via JRP
Biblio: Reception by PPM, DESIGN
API 7
Manager can reject or ask for modifications
PPM
Approval
API 6
Assignment to different Menegers
Automatic dispachement
Manuscript or PDF for printing
Sent into Biblio DAM as binary file
DESIGNER
Approval
PPM CORR-EDIT
Approval
DAM Mail
Manuscript or PDF
5.1.1 Ask for quotation (3 Suppliers)
5.1 PPM Cost estimate & planning (Ext. works)
Major & Flagship Other External productions
5.1.2 Budget Proposal (BP)
API 8
JRP: Unit
Data back to Biblio - Status: Quotation approved
API 9
5.1.3 Approval of BP and PR
Unit approves or reject, to approve a PR number must be sent
5.2 DESIGN (internal)
Print file to PMSERV: Cover for Major and Flagship
API 11
Cover and inner Design for Major & Flagship
Promotional materials
Digital only products
Graphic design & Branding
5.3 PPM Prof-readers or copy editing (internal)
Major & Flagship
Periodicals
DAM Mail
5.1.4.A Assignment to External supplier PO sent
Manual dispachement
5.1.4 B Assignment to PRODOC Unit
API 10
Print file to PMSERV
12 API
API 13
PDF file into DAM
Reception by PMSERV
Approval
5.4 PMSERV (internal)
Ready for delivery

5.4 PMSERV for Printing only in case of

- Limit of pages respected
- Reprint
- Print-ready PDF provided by the applicant (author unit), PUBL, PPM, DESIGN

Biblio report creation for:

- PUBL: to have a summary of what inserted
- PPM: to have a summary of what inserted and details about content provided

How PPM can ask for planning data now?

For each PP publications loaded in Biblio and then visible on JRP it is available an entry mask for sending planning data to PPM attention

In case the Publication is inserted directly in the JRP there is box already on the entry mask

In red Production or Work Requests from JRP, the others are entered directly in Biblio or are the result of the scheduling flow (eg PPM assigns a Cover design to DESIGN or a Proof reading is assigned by DESIGN to PPM proof reader)

0. PUBL
Publishing Plan for

- Book
- Brief
- Code of practice
- Factsheet
- Guide
- Compendium
- Edited volume
- Guidelines
- Handbook
- Monograph
- Report
- Journal article
- Journal
- Official meeting
- Paper
- Periodical. .

4. PUBL
Planning, Costing and Managing

- Major report
- Flagship report
- Executive summary

5.1 PPM
Planning, Costing and Managing production

- Flagship report
- Book
- Code of pactice
- Guide
- Guidelines
- Handbook/manual
- Report
- Generic brief
- Policy brief
- Research brief
- Statistical brief
- Executive Summary
- Fact sheet
- Journal article
- Working paper
- Background paper
- Discussion paper

5.2 DESIGN (Int)
Cover design, Layout and typesetting for

- Major report
- Flagship report
- Guidelines
- Handbook
- Monograph
- Report

Cover design, Layout and typesetting for

- Policy Brief
- Research Brief
- Code of practice
- Guide

Design of Digital only products

- Digital narratives (infostories) - PP
- Data visualizations - PP
- Mobile apps (for example ILC report)
- Illustrations/Graphics/Iconography
- Animation / social media cards

Design of Promotional and identity materials

- Flyer
- Brochure
- Poster
- Banner
- Invitation
- Stationery
- Certificates
- Bloc notes
- Pens
- USB key
- Lanyard
- Mug
- Flags
- Badge
- Other products

Graphic design and branding

- Visual identity
- Campaign & Event design
- Branding check
- Signage
- Design of branding assets
- Template design

5.3 PPM/CORR-EDIT
Prof-reading or copy editing for

- Major Book
- Flagship report
- Book
- Guidelines
- Handbook/manual
- Report

Periodicals

- International Journal of Labour Research (ACTRAV)
- World of Work Magazine

5.4 PMSERV

- Cards
- Print-ready PDF provided by the applicant (author unit), PUBL, PPM, DESIGN

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 Bibio 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

Multiple language handling in Biblio and in JRP

Premise

9. 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”,
10. It means one record per language. In this mode the two platforms are able to communicate easily.

How it will work in JRP

11. 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.
12. 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).
13. 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

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 requesters 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)

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

Migration of JRP records in Biblio

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 PRODOC**
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)