

Metadata for First Edition: request from Publishing Plan, for external works (mainly)

1. Work request and pre-calculation of estimate or cost

1a. Type of output, metadata, files		1b. Pre-calculation of cost or estimate		1c. Work request evaluation & advise
From Publishing Plan (PP)		From Author Unit	From Author unit	IMPR: manager
<p>Categories concerned by PP</p> <p>-----</p> <p>Books (Major and not)</p> <ul style="list-style-type: none"> - Code of practice - Guidelines - Compendium - Edited volume - Good practice - Guide - Handbook - Monograph - Report - Flagship reports <p>Working paper</p> <p>Background paper</p> <p>Digital only</p> <ul style="list-style-type: none"> - Mobile apps - Digital narratives (infostories) - Data visualizations - Platform 	<p>Data from Publishing Plan</p> <p>Full Title</p> <p>Planned launch Date</p> <p>Importance</p> <p>Language (master)</p> <p>Language translation(s) planned</p> <p>Category of publication</p> <p>Specification</p> <p>Format (Paper or Digital, Ebook)</p> <p>Author Unit</p> <p>Contributor type</p> <p>Full name of author(s) or editor(s)</p> <p>Person in charge of publication</p>	<p>Data inserted by Author Unit</p> <p>Type of work:</p> <ul style="list-style-type: none"> - Design and/or layout of --- Cover --- Inner --- Inner and cover - Direct Print <p>Planned Launch/delivery date (can be changed)</p> <p>Upload one or more files</p> <ul style="list-style-type: none"> - Title of the file - Type of file uploaded --- Manuscript --- Graph --- Chart --- Print PDF <i>(it might change the request to internal work)</i> --- Other <p>Unit Account Number <i>(only if internal work)</i></p> <p>Unit Account qualification <i>(only if internal work)</i></p> <ul style="list-style-type: none"> - Regular - TC - Other <p>Notes from Author Unit</p> <p>Date of request (Automatic at the submit)</p> <p>Once submitted the request a work number is automatically assigned.</p>	<p>Data inserted by Author Unit</p> <p>Number of pages of Manuscript <i>(Or number of characters, still to be decided)</i></p> <p>Graphs: yes, no</p> <ul style="list-style-type: none"> - If Graph "yes": upload the related excel files - If Graph "yes" and category "Flagship" or "Major" specify the number --- From 10 to 20, --- From 20 to 40 --- From 40 to 100 --- More than 100: specify number <p>Picture: yes, no</p> <ul style="list-style-type: none"> - If Picture "yes" --- Select source (or Type source) --- Type code reference <p>Color</p> <ul style="list-style-type: none"> - Full color - Black <p>Finishing</p> <ul style="list-style-type: none"> - Lamination recto (Max A3) - Lamination recto-verso (Max A3) <p>No. of copies per language</p> <p>Production specifications already set because depending on output category</p> <ul style="list-style-type: none"> - Type of print: digital or off-set - Paper: type, weight - Binding - Finishing - Packaging 	<p>IMPR: manager</p> <p>If the request is for an external work</p> <p>-----</p> <p>Work request type: Cost evaluation (already selected)</p> <p>Meeting date <i>(if necessary)</i></p> <p>Approval</p> <ul style="list-style-type: none"> - Request approved: Yes, No - Approval date <i>It is a trigger to go to step "2a. Refine Estimates & Job descriptions"</i> - Rejection date - Comments on Rejection <p>If the request is for an internal work</p> <p>-----</p> <p>Work request type: Fixed cost (already selected, can be changed to "Cost evaluation")</p> <p>Approval</p> <ul style="list-style-type: none"> - Request approved: Yes, No - Approval date <i>It is a trigger to go to step "2.1a Work assignment"</i> - Rejection date - Comments on Rejection
<p>Reprint</p> <p>Revised edition</p> <p>Translation</p> <p>can be applied to all categories and to each title already printed. Metadata are duplicated and the new record is linked to the existing one following the parent child logic</p>	<p>In red metadata can be changed by the Author Unit</p> <p>Master language and Language translation(s) planned are linked through the parent child logic</p>	<ul style="list-style-type: none"> - If Reprint: Design not available - If revised edition: Design available - Planned Launch/delivery date can be changed by the Author Unit and by IMPR <p>In case IMPR change the date, the applicant and the Publishing Secretariat are informed through an automatic AMS email (or alert of Front Store)</p>	<p>IMPR can change all metadata</p>	<p>IMPR check and change all data provided by Author Unit before to approve the request</p>

2. EXTERNAL WORK: budgeting, planning & work assignment

2a. Refine Estimates & Job descriptions	2a1. Author unit approval and PR	2b. Request and creation of PO	2b1. Approval workflow of PO	2c. Work assignment
<p>IMPR: manager</p> <p>Cost request to three external suppliers Supplier selection - insertion of a new one if missing 1 or more task assignments for - Cover and/or inner --- Design --- Type-setting and layout --- Proof-reading --- Copy-editing --- Print Production specifications (for each task selected) - Type of print: digital or off-set - Colors : 1 , 2, 3, 4 (plus special color) - Paper: type, weight - Binding - Finishing - Packaging Notes and comments</p> <p>Send the request to supplier through AMS email - Automatic sent date</p> <p>Upload of Suppliers' cost (1 or +) - PDF upload - Supplier selection - Flag one as "selected"</p>	<p>IMPR: manager</p> <p>Job description creation in PDF - Supplier name - Design ---Cost ---Notes - Type-setting and layout ---Cost ---Notes - Proof-reading and/or Copy-editing ---Cost ---Notes - Print ---Cover: B/W or Colour ---Inner: B/W or Colour ---No. of pages ---No. of copies ---Size ---Paper weight ---Finishing ---Binding ---Cost ---Notes</p> <p>Send Job description to Author unit through AMS email (or Front Store) Automatic send date Notes and comments Request of PRs (<i>one per task, or one for all tasks</i>)</p> <p>Approval by Author unit Approved: Yes, No Approval date <i>It is a trigger to go to step "2b PO preparation"</i></p>	<p>IMPR: manager and A.A</p> <p>Insertion of one or more PRs PR number PR amount (US \$) Association of PRs to tasks - Selection of one or more Tasks for the same PR - Selection of different PRs for different Tasks</p> <p>Request for Purchase order (PO) creation to Administrative Assistant (A.A.) Selection of job description and task(s) Selection of A.A. Comments and notes</p> <p>PO creation (in IRIS) Upload of 1 or more POs as PDF POs amount Association of the POs to the PR</p> <p>Request of PO approval PO and Job description submitted to FCO for 1st approval (alert on FCO dashboard) Approval request date Status: <i>waiting for approval</i></p>	<p>A.A. FCO, PRODOC head</p> <p>1st review: FCO Approved: Yes, No - If Yes, PO and Job description are submitted to PRODOC Unit head (alert on dashboard) - If No, PO is sent back to point 2b. - Comments in case of rejection</p> <p>2nd Review: PRODOC Unit head final approval Approved: Yes, No - If Yes, A.A is informed (alert on A.A. dashboard) - If No, PO is sent back to point 2b. Comments in case of rejection</p> <p>Approved PO back to A.A or IMPR Upload in AMS of the signed file (if not possible electronic signature). <i>It is a trigger for IMPR to assign the job to the Supplier</i></p>	<p>IMPR: manager</p> <p>Assignment date Delivery date Notes and comments</p> <p>External supplier Select the supplier Assign one or more tasks for print output: - Design - Type-setting and layout - Proof-reading - Copy-editing - Print Assign one or more tasks for digital (ebook) output - Design - Implementation AMS email to supplier - job description - files (as links to AMS) - Notes ad comments</p> <p>DTP - Internal Select the task: Design and/or Layout of - Inner - Cover - Inner and cover Selection of the Operator(s)</p> <p>CORR - Internal Select if CORR or external collaborator - Select collaborator - CORR person preselect Select the task - Copy-editing - Proof-reading</p>
		<p>For PR amount: automatic currency conversion (based on official Exchange rate currencies in IRIS) The PO amount is inserted in the AMS in the original currency. The AMS convert automatically the amount in USD (in a separate field)</p>		<p>The person to who assign the job in CORR is preselected (it depends on language of the publication)</p>

3. EXTERNAL WORK: manage & control production

3a. Design (reiterative process)	3b. Typesetting and layout (reiterative process)	3c. Proof-reading (reiterative process)	3d. Print
IMPR: manager	IMPR: manager	IMPR: manager	IMPR: manager
IMPR check the design Reception date of files from supplier (mail or dropbox) Upload files Date of upload Specify task: - <i>Design</i> File specification: - Cover - Inner AMS email to Author unit for approval (or Front Store) - link to PDF files - Notes and comments Approval by Author unit Approved: Yes, No Rejection with comments Approval date and specification if - <i>Finished OR</i> - <i>Trigger for 3b Typesetting and layout OR</i> - <i>Trigger for 3.1b Typesetting and layout (DTP)</i>	IMPR check Typesetting and Layout Reception date of files from supplier (mail or dropbox) Upload files Date of upload Specify task: - <i>Typesetting and Layout</i> File specification: - Cover - Inner AMS email to Author unit for approval (or Front Store) - link to PDF files - Notes and comments Approval by Author unit Approved: Yes, No Rejection with comments Approval date and specification if - <i>Finished OR</i> - <i>Trigger for 3c Proof-reading OR</i> - <i>Trigger for 3.1c Proof-reading (CORR)</i>	Check proofs , Cover and inside (reiterative process) Reception date of files from supplier (mail or dropbox) Upload files File specification: - Cover - Inner Proof number: 2, 3, ... Proof date Final approval by IMPR Bon à tirer, <i>It is a trigger starting 3.dPrint</i>	AMS email to supplier with Bon à tirer Automatic date in AMS Comment to supplier AMS email to supplier to receive the final source file and the final PDF for the print Upload in the AMS files File specification - Print PDF - Source File
After the approval of Design the Typesetting and layout can be assigned to the external supplier (the same or another) or to DTP	After the approval of Typesetting and layout, the proof-reading can be assigned to the external supplier (the same or another) or to DTP		

4. EXTERNAL WORK: Confirmation of order

4a. Reception of confirmation of order
IMPR: manager
Confirmation of order request to Supplier (by AMS email) Upload of the PDF New PO amount in case of changes - The old amount remains visible Description of changes Confirmation order approved - Automatic date <i>It is one of the trigger for Closing of external work (the other is the delivery notification from DISTR)</i>
The PO modification can be assigned to A.A.

Metadata for First Edition: request from Front Store, for internal works (mainly)

1. Work request and pre-calculation of estimate or cost

1a. Type of output, metadata, files		1b. Pre-calculation of cost or estimate	1c. Work request evaluation & advise
Front store: Author Unit		From Author unit	IMPR: manager
Category selection ----- Paper (Layout, Print) - Discussion paper Periodical (Layout, Proof, Print) - Journal - Magazine Promotional (Design, Layout, Proof, Print) - Flyer - Brochure - Poster - Banner - Newsletter - Visit card - Stationery - Invitation - Certificates - Bloc notes - Stylos Digital only - Animation - Micro-site Visual identity (Design)	Data inserted by Author Unit Full Title Planned delivery Date Language (Master) Language translation(s) planned Category of publication Specification Format (Paper or Digital) Author Unit Full name of author(s) or editor(s) Person in charge of publication Type of work: - Design and/or layout of --- Cover --- Inner --- Inner and cover - Direct Print Upload one or more files - Title of the file - Type of file uploaded --- Manuscript --- Print PDF --- Other Unit Account Number <i>(only if internal work)</i> Unit Account qualification <i>(only if internal work)</i> - Regular - TC - Other Notes from Author Unit Date of request (Automatic at the submit) Once submitted the request a work number is automatically assigned.	Data inserted by Author Unit Number of pages of Manuscript <i>(Or number of characters, still to be decided)</i> Picture: yes, no - If Picture "yes" --- Select source (or Type source) --- Type code reference Color - Full color - Black No. of copies per language <u>Production specifications</u> already set because depending on output category - Type of print: digital - Paper: type, weight - Binding - Packaging	If the request is for an internal work ----- Work request type: Fixed cost <i>(already selected, can be changed to "Cost evaluation")</i> Approval - Request approved: Yes, No - Approval date <i>It is a trigger to go to step "2.1c Work assignment"</i> - Rejection date - Comments on Rejection If the request is for an external work ----- Work request type: Cost evaluation <i>(already selected)</i> Meeting date (if necessary) Approval - Request approved: Yes, No - Approval date <i>It is a trigger to go to step "2a. Refine Estimates & Job descriptions"</i> - Rejection date - Comments on Rejection
Reprint can be applied to all categories and to each title already printed. Metadata are duplicated and the new record is linked to the existing one following the parent child logic	Digital is: eNewsletter Unit Account Number and qualification not necessary if the new closing of work process is implemented (see the process) Master language and Language translation(s) planned are linked through the parent child logic		IMPR check and change all data provided by Author Unit before to approve the request The request can changed from "fixed cost" to "cost evaluation" <i>It is a trigger to go to step "2a. Refine Estimates & Job descriptions"</i>

2.1 INTERNAL WORK: planning & work assignment

2.1a. Work assignment

IMPR: manager

Assignment date
Delivery date
Notes and comments

External supplier

Assign one or more tasks for **digital output**

- Design
- Implementation

DTP

Automatic assignment for Design and/or Layout of

- Promotional material
- Inner
- Cover
- Inner and cover

Manual assignment for Design of

- Visual identity

Selection of the Operator(s)

- one or more for the same task (workgroup creation)

CORR

Manual assignment, select if CORR or external collaborator

- Select collaborator
- CORR person preselect

Select the task

- Copy-editing
- Proof-reading

REPRO

Automatic Assignment to REPRO when the applicant uploads a PDF for the print

The person to who assign the job in CORR is preselected (it depends on language of the publication)

3.1 INTERNAL WORK: manage & control production

IMPR manage and control, sometime, only the file for the Print during Proof reading. It is because DTP and CORR are mainly engaged during the production.

3.1d. Print

IMPR: manager

Bon à tirer for REPRO

Upload in the AMS Print PDF

File specification

- Print PDF

- Bon à tirer

Automatic alert on REPRO dashboard