Interior and Cover Design Process – End-to-End

Updated January 2023

Interior Designs (New, Modify, Pick-up) and Covers (All Media)

Key Contributors

AU = Author
CSD = Creative Studio Designer
PPM = Portfolio Product Manager
VCM = Vendor Content Manager
CL VCM PM = Cengage E2E Project Manager
DV = Design Vendor (design rate card program)
IC Freelance Designer = Independent Contractor Freelance Designer

Principles

- The goal of E2E projects is create a design package as efficiently as possible either by utilizing the E2E Library or limiting design changes from the prior edition.
- E2E projects require a lighter creative touch compared to in-house full revisions.
- Creative Studio has a rate card program in place with DV that has demonstrated success with uncomplicated design requests.
- For titles with complex needs*, IC Freelance Designers will be utilized.
  To be considered complex, titles must have specialized content not suitable for offshore vendors due to cultural differences, i.e., Criminal Justice may fall into this category.

Standards

- The CSD is the owner of cover, cover mechanical, and interior design deliverables. This reduces the time in design, creates efficiency in the production workflow and time to market.
- The CSD relies on the PPM to determine design needs and CSD will contract with DV/IC Freelance Designer as needed for Cover and Interior Design work.
- The VCM should not engage the AU in design review discussions. If an AU has design-based questions, they should be redirected to the PPM.

  Cover and Cover Mechanical:
  - Simple/Moderate Covers will be sent to DV with direction from CSD.
  - Complex* covers will be sent to IC Freelance Designer with direction from CSD.
  - The review process is expected to take no more than 3 rounds of review/feedback between CSD and PPM **only**. Going more than 3 rounds will result in an additional design-related fees. **AU involvement in the design review process should be reserved only for circumstances of contractual obligation, and in those instances any AU review of design assets will be managed by the PPM.**

  Interior:
  - The PPM's design plan for the interior layout should be populated on the IDTF. There are 3 options to choose from:

- **Pick-Up**
  The Interior Design is picked up as-is from prior edition (i.e., interior design is the same as previous edition). Any instances of Interior Designs designated as Pick-Up will be reviewed by CSD and updated for accessibility concerns. Depending on the complexity of any accessibility updates, the CSD may use DV or an IC to update the design. Those edits will be the only design changes implemented for Pick-Up designs.
    - If the previous edition files are Quark/3B2, the VCM will arrange for the files to be converted to InDesign for Pick-Up Interior Designs. In these cases, the CL VCM PPM is responsible for approving the cost estimate and ensuring the conversion of files from Quark/3B2 to InDesign takes place prior to paging.

- **Modify**
  An existing Interior Design from a previously published product is lightly updated (e.g., color palette change from 1/c to 4/c, or one to two element edits) for use with the E2E title. The PPM will need to indicate the source of the Interior Design by ISBN for all Modify designated Interior Designs. An accessibility check will need to be performed by the CSD on any source designs older than 2021.

- **E2E Library**
  The Interior Design is selected by the PPM from a library of ready-to-go options provided by Creative Studio. Only minimal design changes (such as color palette adjustments) will be made to E2E Library options. Here is a link: [E2E Interior Design Library](#)

  o Design work for Pick-Up will only be updated to address accessibility concerns. **No new icons/styles will be created.**
  o Modify and E2E Library Interior Designs will either be sent to DV, or to IC Freelance Designer with direction from CSD.
  o No more than 3 rounds of review/feedback between CSD and PPM only.

Workflow

Prior to the Transmittal to Design Routing

- After the proposal is approved and the schedule is created, the following should occur:
  - PPM populates the Text Design Type in IPS for ALL print components of the product suite.
  - PPM populates the Text Design Type in the Into-Development Transmittal Form (IDTF)
    o VCM confirms plan for Interior Design with PPM: Pick-Up, Modify, or [E2E Library](#).
    o If Pick-Up, VCM checks prior edition archive to determine if files need to be converted to InDesign.
  - VCM updates Design Materials to AD date in IPS (this date should reflect at least 12 weeks or about 3 months prior to Project to Production Service Begin date or 3 months prior to the Sample from Compositor.).

Transmittal to Design Routing

1. The VCM should initiate a Creative Studio Request (CSR) at least 12 weeks (about 3 months) prior to the Project to Production Service schedule date or 3 months prior to the Sample from Compositor.
2. To initiate the CSR, the following should occur:

- The VCM will submit a new [Creative Studio Request](). The VCM should follow the steps in the **Transmittal to Design in Workfront: End-to-End/VCMs** document found here [cs.cengage.com/resources]().
  - All requests that include Interior Design work, regardless of whether the Interior Design is Pick-Up, Modify, or E2E Library will require the following attachments from the VCM:
    - **IDTF** (Project Details)
    - **[Visual Design Plan Elements List]()** (Elements list of all of the elements included in the Sample Manuscript)
    - **Table of Contents** (TOC) (draft—if final is not ready)
    - **Sample Manuscript** (Front Matter, Chapter Content, and Back Matter representing all of the elements that need to be designed for. This can be a PDF from the prior edition, but any new elements must be provided also)
    - **Art Manuscript** (if new graphics/line art program is needed or existing art needs modifications, i.e. converting an art program from 1-color to 4-color)

- If the Interior Design is **Pick-Up**, the VCM should add a note in the *"How would you describe the objectives of this project?"* text field of the CSR indicating it is a Pick-Up Interior Design and it needs an Accessibility Audit.
  - If the prior edition files were converted to InDesign, the VCM should also share a link to those files.
- If a **Modify** Interior Design has been selected, the VCM should add a note in the *"How would you describe the objectives of this project?"* text field of the CSR indicating it is a Modify design and noting the ISBN of the source design to be modified (e.g., This Modify Interior Design is based on ISBN 9781234567890.).
- If an **E2E Library** Interior Design has been selected, the VCM should add a note in the *"How would you describe the objectives of this project?"* text field of the CSR indicating it is an E2E Library Interior Design and noting which design layout from the library will be used.
- After the required files have been attached, the VCM can click submit on the CSR form to send the project to Creative Studio.
- The request will be assigned to the discipline aligned CSD within 48 hours (about 2 days).

3. The CSD will review the submitted documents/files and will email the VCM and CL VCM PM to confirm the successful receipt of the transmitted design request. If required files or information is missing from the submitted request, the CSD will not begin any work on the project. The CSD will email the VCM, indicating which components are missing/needed. The VCM will need to respond and provide the missing information/files before work on the project can begin.

   If the VCM and/or the CL VCM PM does not receive an email after 3 business days, the VCM will follow up with the CSD asking for confirmation.

Interior Design Process

Design, Review, and Revise

No more than two weeks after receiving the complete set of attachments, the CSD initiates one of the following workflows based on the needs of the product:

Pick-Up
- CSD reviews files for accessibility.
  - o If no updates are needed, CSD will let VCM know via email that the files can be used as-is.
  - o If changes or updates are needed, CSD will determine the right solution to address the changes.
  - o The CSD will provide confirmation to the VCM via email that the design meets accessibility standards.
- *Follow steps 1-5 below.*

Modify
- CSD will schedule a launch meeting with the PPM to discuss if any light edits are required to fit the source design identified for this project.
- CSD will email the VCM to inform them that the launch has taken place and the design work is underway. CSD will also communicate the estimated date of the final design package.
- CSD will send the Design Brief and Design Package or clear documentation to DV, this package will include the previously published source design files and will indicate any updates that are required.
- *Follow steps 1-5 below.*

E2E Library

- CSD will schedule a launch meeting with the PPM to review the pre-selected design layout from the E2E Library and discuss any new elements that need to be captured into the design.
- The CSD will send the Design Brief and Design Package to DV or the IC Freelance Designer, indicating which design will be picked-up from the library, and any updates that are required.
- *Follow steps 1-5 below.*

1. Interior Design work is typically allocated a two-week window for creation of initial comps. CSD will confirm the schedule.
2. When designs are received back from DV or the IC Freelance Designer, the CSD sends the PDF proof of the interior design to the PPM.
   - The PPM is expected to review and add notes to the routing within 1 week unless previously discussed.
3. The CSD will review the completed proof routing and will determine if changes need to be made. The CSD executes/directs revisions to the layout and re-routes revised or additional concepts to the PPM. The revisions cycle should be two weeks or less.

- This process continues until the interior design is final, with the expectation that no more than three rounds of review and revision will take place.
4. Following final approval of the core interior, CSD coordinates the final interior design package upload to the Digital Source Repository (DSR) and lets the VCM know via email that it's ready for download.
5. The CSD is responsible for updating the estimate for the actual spend in IPS and approves any design-related invoices.

Sample Pages

1. The Production Service should use the uploaded Interior Design Package from the DSR to generate sample typeset pages that adhere to the provided layouts and specs.
2. Sample pages should be shared with the CSD to confirm the Production Service has successfully executed the design.
3. If AU expresses design-based concerns during the page review process, it is important for the PPM to confirm any AU requested design changes are market critical and accept the impact to the production schedule. If the PPM determines the requested changes are not market critical, the PPM communicates this to the author and design changes are not made.

Cover Design Process

Design, Review, and Revise

1. Cover Design work is typically allocated a two-week window for creation of initial comps.
2. Cover Designs are completed and posted based on schedules that align to market needs.
3. Once the CSD is satisfied with the preliminary cover comps, the CSD sends a PDF of the cover comps to the PPM.
   - The PPM reviews and add notes to the routing within 1 week unless previously discussed.
4. The CSD will review the completed proof routing and will determine if changes need to be made. The CSD executes/directs revisions to the layout and re-routes revised or additional concepts to the PPM. The revisions cycle should be two weeks or less.
   - This process continues until the interior design is final, with the expectation that no more than three rounds of review and revision will take place.
5. Following final approval of the core cover, CSD coordinates the receipt of the cover stock images as needed and oversees the creation of all derivative core covers in the Product Family and upload into PIM.
   - Credit Lines for Cover stock images will be emailed to the CL VCM via the Content Acquisition Analyst (CCA)
6. CSD coordinates the final cover design package upload to the Digital Source Repository (DSR) and lets the VCM know via email that it's ready for download.
7. The CSD is responsible for updating the estimate for the actual spend in IPS and approves any design-related invoices.

Cover Mechanical Process

1. Once the cover is approved, the CSD will have the cover mechanical template created. Note- Cover designs executed by DV will also have the cover mechanical created by DV.
2. The CSD will route the cover mechanical PDF for approval to the PPM following the same process as the Cover Design review.
3. Once approved, the CSD will coordinate having the final cover mechanical design package uploaded to the Digital Source Repository (DSR) and lets the VCM know via email that it's ready for download.
4. The Production Service Vendor will be responsible for adjusting the spine width of the cover mechanical as needed for final page count/PPI before going to the printer.
5. The CSD approves any design-related invoices.