

HTML5 Asset Creation Workflow

CSR: Creative Studio Request

CM: Content Manager

CS: Creative Studio

CSD: Creative Studio Designer

PPM: Portfolio Product Manager

LD: Learning Designer

SME: Subject Matter Expert

MD: Media Designer

TCD: Technical Content Developer

QA: Quality Assurance

DPM: Digital Project Manager

Pre-Plan

Determine HTML5 Platform Type/Build Needs

This will be different depending on where the HTML5 product will live:
WebAssign/MindTap/Other

CM requests demo ISBN creation.

This will be used for testing the HTML5 asset in the appropriate environment.

CM fills out [Creative Studio Request](#).

A CSR is only needed if the Creative Studio is involved.

If the project requires a clickable prototype as a Proof of Concept (POC), the **CM** should fill out the Creative Studio Request (CSR).

WebAssign: Consult with Program Manager to determine if the project can be built internally.

Plan

Design Launch

CSD (CM if not involving CS) schedules a design launch with key project stakeholders. (Stakeholders could include but are not limited to: PPM, CM, LD, SME, MD, TCD, QA, DPM) Meeting will flush out asset ideas, review who is responsible for key milestones, review proposed schedule and budget. Meeting will also determine the level of complexity and proposed art program and whether an internally-created clickable prototype is needed. (If in MT, the Magma style will be applied.) Responsiveness, browser testing needs, time needed for QA, and acceptance criteria should also be determined.

DPM creates a JIRA ticket (Project: DIG Issue Type: HTML5) to be used for all communication and reviews. This is an optional step if there will be heavy development work to track. See additional information on how to create this at the wiki [HTML5 Jira Ticket Creation](#) article.

Get Vendor Bids

CSD (CM) requests quotes from [preferred vendors](#) and compares them to the [rate card](#) (see the second bullet on the right).

CSD (CM) communicates quotes/samples with project team. Project team chooses the vendor.

Hire Content Creators

CM hires SMEs, copyeditors, authors, alt text vendors as needed.

Create

Content Storyboards, Scripts, and Art Manuscript Development

CM completes the storyboard ([access template under Storyboard and Script Template heading](#), if applicable) and/or art manuscript template.

CM delivers final, copyedited, SME-approved content, which could include content storyboards, scripts, and art manuscripts. Note that headings and tab order should be indicated on all content.

Visual Storyboards/Wireframes (if CS is involved)

CSD designs wireframes. If there is a complex art program, the **MD** will storyboard the art manuscript. **CSD** is responsible for coordinating the art program with the **MD**.

CSD provides wireframes and/or visual storyboards to the **team** for approval.

CM is responsible for having their stakeholders sign-off on the visual storyboards and wireframes.

Vendor Kick-off Meeting

CSD (CM) schedules a kick-off meeting with vendor.

Meeting will review proposed schedule and budget and answer any questions from the vendor about scope. The **CSD (CM)** should make sure the vendor is aware that if future issues come up, they will need to fix in the Post-Build phase.

CSD confirms schedule and budget with **CM**.

Style Guides and Final Assets (if CS is involved)

CSD builds style guides and creates assets.

Team to review and approve all assets (could be done as part of internal POC, if included).

CM hires alt-text creation vendor. Once it's received, an in-house or external **SME** or the **CM** will review.

Build

General:

CSD (CM) delivers final package to the vendor, including style guides, image assets, content storyboards, alt text, and Cengage [HTML5 Standards for Vendors](#) (fifth bullet on the right).

Vendor reviews package and confirms schedule and budget.

CSD manages the vendor relationship and shares project, schedule, and budget changes with the **CM**.

Vendor is responsible for building assets per Cengage guidelines.

Deliverables:

POC

Vendor posts proof of concept ahead of the creation of the entire asset program.

DPM puts the POC in a demo LP (for MTC products) or in a MEF workspace in order to generate a MEF preview link (for DFP products).

DPM uploads to Geysler and also checks in staging or final environment. Be sure to test asset in assessment (i.e., in split-page CLA or CNOW frame), if applicable, so that POC surfaces zoom, truncation, or overlap issues are addressed at this stage.

CSD reviews basic functionality, [accessibility](#), and design against the provided styleguides.

CM reviews basic functionality, [accessibility](#), and content against final content. **CM** has all relevant team members review POC (**SME, PPM, LD**).

POC QA

DPM coordinates with the **Accessibility QA** team and creates JIRA Accessibility QA ticket, see wiki articles for [VPAT and Accessibility Testing](#).

Testing in platform should be done if asset will be placed in a frame (i.e. CNOW or split page CLA preview link). Otherwise, testing can be done using local files.

Vendor will make any additional changes per the bugs logged in JIRA.

If team has issues addressing accessibility bugs, reach out to the Accessibility team via the [Learning Team Engagement Form](#).

Alpha – First round of HTML5 assets for review.

CSD and **CM** review and approve in JIRA.

CSD confirms changes were made per the POC feedback, reviews basic functionality, accessibility, and design against the provided styleguides.

CM confirms changes were made per the POC feedback, reviews basic functionality, accessibility, and content against final content.

Beta*– Revised round of HTML5 assets for review.

CSD and **CM** are responsible for review and approval.

CSD confirms changes were made per the Alpha feedback.

CM confirms changes were made per the Alpha feedback.

*Note that this is typically the final round of asset review. Additional rounds may occur if necessary.

QA – Vendor delivers the HTML5 package.

DPM coordinates with the **QA** team.

Vendor will make any additional changes per the bugs logged from the QA review.

Gold – Vendor delivers final HTML5 package with all bugs fully resolved.

CSD (CM) ensures editable files are included, then alerts the **CM/DPM**.

This is required 6 weeks before Post-Digitization Review(PDR) and 4 weeks before Product Assurance Testing (PAT). See table at the bottom of this document to clarify the different project workflows.

Post-Build

CSD (CM) will ensure all final vendor invoices are paid.

CSD (CM) will archive the HTML5 package on the DSR in Alfresco. See instructions on DSR HTML5 ingestion [here](#).

ESCAL tickets used to communicate errors/updates. **CSD (CM)** will follow-up with vendor to ensure the fixes are made.

Type of HTML5 Activities Developed or Redesigned	MTC (MindTapClassic) Process and QA Requirements	DFP (Digital First Publishing) Process and QA Requirements
Chapter-level assets with similar format + design (POC templated needed)	POC template tested in Accessibility QA via either local files or Demo LP with testing complete and fixes made before PAT at least 4 weeks before in-stock*	POC template tested in Accessibility QA via MEF preview links with testing complete and fixes made for PDR at least 6 weeks before in-stock
Unique, standalone assets (no POC template)	Assets tested in Accessibility QA via local files or Demo LP with testing complete and fixes made before PAT at least 4 weeks before in-stock*	Assets tested in Accessibility QA via MEF preview links with testing complete and fixes made for PDR at least 6 weeks before in-stock

*For MTC, if HTML5 is meant to be included in assessment or if any further ch-level testing against source docs is needed, then PDR is required, so please add two weeks to schedule. HTML5 assets will be rendered in Geyser