

Interior and Cover Design Process

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

Updated April 2023

Key Contributors

CSD = Creative Studio Designer

CM = Content Manager

LD = Learning Designer

PPM = Portfolio Product Manager

IC Freelance Designer = Independent Contractor Freelance Designer

Prior to the Transmittal to Design Routing

1. At proposal setup of at least 20 weeks prior to **Project to Production Service**, the following should occur:
 - a. **Text Design Type** in IPS is populated for ALL core products.
 - i. **CM** confirms Text Design Type in the Content Plan on Creative Assets tab and populates field in IPS.
 - ii. If the product team has decided to use a text design from a different product, the ISBN of that design should be populated on the Content Plan, respectively.
 - b. **Design Materials to AD** date is populated in the project's IPS record. This date should reflect at least 12 weeks prior to **Project to Production Service** Begin date.
 - i. **CM** populates **Design Package to AD** date on the Schedule screen.

Transmittal to Design Routing

2. Before initiating a **Transmittal to Design** Routing via the [Creative Studio Request](#) form, the Financial stage in IPS must be ATP (Approved to Production) and an ISBN must be assigned for all core versions of the title.
3. To initiate the **Transmittal to Design** Routing, the following should occur:

Note: See the **Transmittal to Design Process** document posted here [Creative Studio Website/Resources](#) for more details on the below steps.

- a. **CM** does the following via the [Creative Studio Request](#) form:

For New or Modify interior design requests, attach the following:

- Sample manuscript (representative of all elements)
- The [Visual Design Plan](#)
- Detailed TOC (a draft version is acceptable)
- Art/Photo manuscript sample (if art styling or photo essays need consideration)
- Art/Photo samples (if art styling or photo essays need consideration)

For Pickup interior designs: Attach the following items needed for the CSD to conduct an ADA compliance audit:

- The [Visual Design Plan](#)
 - Previous edition PDF
4. After the required files have been attached, click the submit button on the CSR form. The request will go to the Visual Design Team Manager for assignment. The request will be assigned to the discipline aligned CSD within 48 hours (about 2 days).
 5. After the request is assigned, an automated notification will be sent to the assigned **CSD** and to the **requestor/CM**.
 6. The **CSD** reviews the request and supporting document attachments. If there is anything missing that would prevent a Launch Meeting from being scheduled, the **CSD** will email the **CM** to request the missing information/docs. Otherwise, the **CSD** will schedule the Design Launch Meeting.

Design Launch Meeting

7. The **CSD** schedules a Design Launch Meeting no later than two weeks after they receive the **Transmittal to Design** request. The meeting cannot take place until after all the required **Transmittal to Design** documents have been received.
8. The **CSD** invites the following attendees to the Design Launch Meeting:
Required:
 - CM
 - LD
 - PPM
 - Optional (*This list should be confirmed with the PPM*):
 - Product Assistant
 - Marketing Manager
9. The **CSD** reviews the **Transmittal to Design** routing attachments prior to meeting and comes prepared with questions and updates.
10. The **CSD** leads the discussion to establish:
 - scope and design goals of the product
 - critical elements and pedagogical functionality
 - product suite requirements (whether digital or print)
 - completeness of the Sample Manuscript and Element List
 - influence of competing titles
 - authors involvement in design reviews/approvals
 - ADA compliance
11. The **CSD**, **CM** and **PPM** confirm design-related IPS fields (e.g., complexity) and budgets. If the amount of work required and budgeted amount are not in sync, the **CSD** discusses the budget concerns with **PPM** and **CM** and will need an approval of a new budget before moving forward.

12. The **CSD** and **CM** agree to the delivery date of the final interior design package posted to the DSR. The goal is to have complete and approved interior by the **Project to Production Service Begin** date.

Following the Design Launch Meeting

13. If Element changes are made during the Design Launch, the **CM** should supply a revised Elements List, and sample copy, if needed.
14. No more than two weeks after the Design Launch Meeting, the **CSD** selects one of following:
 - Initiates hands-on work to create design assets.
 - Works with a Design Vendor or contracts with an **IC Freelance Designer** to initiate work on design assets.
15. After making the decision of how work will be executed, the **CSD** is responsible for updating the estimate for the actual spend in IPS and confirming the schedule to the **CM**.

Cover Design Process

Design, Review, and Revise

16. Cover Design work is typically allocated a two-week window for creation of initial comps. Cover Designs need to be created and approved on schedules that align to market needs. The **CSD** confirms delivery date requirements for cover files at Design Launch Meeting.
17. Once the **CSD** is satisfied with the preliminary cover comps, either generated internally or received from a **Design Vendor/IC Freelance Designer**, the **CSD** sends a PDF of the cover comps to the project stakeholders in Workfront. *Click to download the [Reviewing Proofs in Workfront](#) process doc.*
 - The team reviews and add notes to the routing within **1 week** unless previously discussed.
18. The **CSD** reviews the collected feedback and determines if changes need to be made. The **CSD** executes/directs revisions to the cover comps and re-sends revised or additional concepts to the project stakeholders in Workfront. The revisions cycle should be two weeks or less. This process continues until the cover design is final.
19. Following final approval of the core cover, the **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 uploads the JPEGs to PIM/Media Manager.
20. **CSD** coordinates the final cover design package upload to the Digital Source Repository (DSR) and lets the **CM** know it's ready for download.

Cover Mechanical Process

21. Once the cover is approved, the cover mechanical template will be created and routed for approval by the project stakeholders in Workfront following the same process as the Cover Design review.
22. The **CSD** sends a PDF of the cover mechanical to the project stakeholders in Workfront
 - The team reviews and add notes to the routing within **1 week** unless previously discussed.
23. The **CSD** reviews the collected feedback and determines if changes need to be made. The **CSD** executes/directs revisions to the cover comps and re-sends revised or additional concepts to the project stakeholders in Workfront. The revisions cycle should be two weeks or less. This process continues until the cover mechanical is final.
24. Following final approval of the cover mechanical, the **CSD** coordinates the final cover mechanical package upload to the Digital Source Repository (DSR) and lets the **CM** know it's ready for download.

The Production Service Vendor will be responsible to adjust the mechanical as needed for final page count/PPI before going to the printer.

- Optional: the **CM** can route a final version from the Production Service Vendor for final approval.
- Refer to the **Cover Mechanical Process** document posted here [Creative Studio Website/Resources](#)

Interior Design Process

Design, Review, and Revise

25. Interior Design work is typically allocated a two-week window for creation of initial comps.
26. Once the CSD is satisfied with the preliminary layouts, either generated internally or received from a Design Vendor/IC Freelance Designer, the CSD sends a PDF of the cover comps to the project stakeholders in Workfront. *Click to download the [Reviewing Proofs in Workfront](#) process doc.*
27. The team is expected to review and add notes to the routing within 1 week unless previously discussed.
 - Some projects will require an in-person review, in addition to the asset routing. This will be established at the Design Launch Meeting.
28. CSD reviews collected feedback and determines if changes need to be made. CSD executes/directs revisions to the layout and re-routes revised or additional concepts to the project stakeholders in Workfront. The revisions cycle should be two weeks or less. This process continues until the interior design is final.
29. Following final approval of the core interior, **CSD** coordinates the receipt of the interior stock images as needed and oversees the creation of the final interior design package:
 - a. **CSD** coordinates the final interior design package upload to the Digital Source Repository (DSR) and lets the **CM** or know it's ready for

download.

30. The **CSD** approves any design-related invoices.

Sample Pages

31. Production Service uses the Interior Design Production Ready Package to generate sample typeset pages that adhere to the provided layouts and specs.

32. Sample pages are sent via email from the Production Service to the **CM** who shares them with the **CSD** to confirm the Production Service has successfully executed the design.

33. Stakeholders should follow the [Page Proof Review Checklist](#).

Revision Notes:

Date	Revision	Author
2021 February	Updates to reflect TTD and proof review routing in Smartsheet, new request process, and E2E program	Creative Studio
2022 February	Updated link to TTD process.	Creative Studio
2023 January	Updated to swap Smartsheets to Workfront.	Creative Studio
2023 February	Update <i>Transmittal to Design Routing</i> steps/requirements to match Workfront workflow and Visual Design Plan.	Creative Studio
2023 April	Fixed Type in Step 1b – 12 weeks prior...not 2	Creative Studio

Document Contact

[Angela Sheehan](#)

