

Preceded by: 13-Sample Chapter with Live Content (PM9)

14-First-Pass Pages (PM10)

Followed by: 15-2nd Pass Pages (PM11)

Why: *The review of 1st-pass page proofs is a primary quality assurance stage in the production of a textbook or print supplement. The accuracy of the content, adherence to spec and design, and application of good page makeup procedures all receive their greatest scrutiny during the review of 1st-pass pages.*

Who: *Possible Participants = Proofreader, Author, Acquisitions Editor, Editorial Project Manager, Development Editor, Accuracy Checker, Art Director, Prentice Hall Project Manager/, Full-Service Vendor Project Manager*

Skills Needed: *Proofreading; spelling; grammar; ability to read and interpret specs and design layouts; knowledge of good page makeup principles; content expertise (accuracy checkers only); ability to annotate PDF files; Proofreader, PH PM/Liaison, FSV PM should all have experience reading page proofs, using and interpreting standard proofreading symbols*

Knowledge Base Needed: *Quark, Microsoft Word; Adobe Acrobat*

TASK: Determine If Author Can Use PDF Workflow

During preproduction discussions or upon manuscript release, the Project Manager (PM)/Liaison should determine if the author is comfortable using a PDF workflow to review pages. PDF workflow is a best practice, and we should encourage authors who seem capable to work this way.

The discussion with the author should include software requirements and user capability, a walkthrough of the process of moving files back and forth, as well as how to review PDF pages, respond to queries, and mark up corrections. Supporting documents should be sent to the author to help demonstrate the process: [PDF_pageproof_process.doc](#), [PDF_Sample.pdf](#) and [PDF_author_guide.pdf](#)

Authors will need Adobe Reader v7x or higher for either Mac or PC. To get a more up to date version, authors can quickly download the free Adobe Reader from www.adobe.com.

Authors who are not comfortable with the PDF workflow may work on hard copy in the traditional way.

TASK: Confirm Workflow for Review of 1st-Pass Pages

Step 1: Following the production launch meeting, but no less than one week prior to start of 1st-pass pages, in house PM/liaison reviews project records to confirm workflow for review of 1st-pass pages.

Step 2: Confirm routing method for 1st-pass pages, which will either be electronic (PDF) or hard copy (printed page proofs).

TASK: Hire Proofreader

Step 1: Hire proofreader utilizing information in the PHHE Vendor Database. Confirm that he/she can work via electronic workflow.

Step 2: Confirm that there is a completed Freelancer Engagement Data Sheet (FEDS) form on file for the proofreader (should be available in the PHHE Vendor Database). If not, one must be filled out and signed by the Business Manager and/or Production Director.

Step 3: Send the proofreader a Freelancer Agreement establishing the per-page rate and schedule. If in-house production path, the PM issues a purchase order to the proofreader for the estimated amount. If full-service production path, proofreading will be included in the overall Full Service Vendor (FSV) purchase order issued by the **Operations Specialist (OS)**.

TASK: Confirm if Accuracy Checker is Required

Step 1: Confirm with Acquisitions Editor (AE) and/or Editorial Project Manager (PMEd) if accuracy checking of 1st-pass pages is needed and if so, confirm who hires Accuracy Checker (AC). *AE/PMEd typically hires AC directly; but In-House PM/Liaison should advise if the FSV offers this service as that may streamline the process.*

Step 2: Confirm with AE the specific tasks that the AC should complete when reviewing 1st-pass pages.

Step 3: If In-House PM/Liaison hires, select AC utilizing information in the PHHE Vendor Database. Confirm that he/she can work via electronic workflow.

Step 4: Confirm that there is a completed Freelancer Engagement Data Sheet (FEDS) form on file for the AC (should be available in the PHHE Vendor Database). If not, one must be filled out and signed by the Business Manager and/or Production Director.

Step 5: Send AC a Freelancer Agreement with the established per-page rate and a schedule. Issue a purchase order for the estimated cost to the AC.

TASK: Determine Proofreading Workflow Processes

If Electronic Workflow

Step 1:

a) Approximately one week prior to start of 1st-pass pages, in house PM/liaison requests project structure be posted in PAL-Projects and confirms access for participants through PHHE Archive

OR

b) PM instructs the compositor to set up project via a designated FTP site. Original PDF files of 1st-pass pages and annotated PDF files that have been reviewed by all participants will be posted to this site.

Best practice workflow is to use PAL-Projects.

Step 2: In-house PM/liaison contacts all participants to determine if they have PAL-Projects accounts or if they need to pick up files from an external BCH. Anyone expected to post annotated files on PAL-Projects will require a PAL-Projects account; accounts can be requested through the team's knowledge manager.

Step 3: Confirm whether participants are reviewing PDF files of 1st-pass pages concurrent with proofreader or if participants are reviewing proofread pages.

Best practice is to have PDF files of 1st-pass pages proofread before sending to author, but schedule may not allow for this.

If Hard Copy Workflow

Step 1: In-house PM/liaison confirms that compositor will print and ship paper proofs. On occasion, Pearson's Demand Print Center (DPC) will print and ship paper proofs, particularly for offshore vendors where shipping times can affect schedules.

Step 2: In-house PM/liaison confirms 1st-pass pages participants involved in review process.

Step 3: In-house PM/liaison confirms whether 1st-pass pages participants are reviewing pages concurrent with proofreader or if participants are reviewing proofread pages.

Best practice is to have 1st-pass pages proofread before sending to author.

Step 4: In-house PM/liaison confirms number of sets of pages to be ordered (color and b&w) and provide compositor or DPC with participants' shipping information. If schedule is tight, may need to provide authorization to use overnight shipping.

TASK: Confirm Index Workflow

Step 1: In-house PM/liaison confirms indexing plan with AE/PMEd and/or author if the author prepares the index OR an indexer needs to be hired. Determine whether index can be created from 1st-pass or second-pass pages.

Best practice is to have index created from second pass if schedule allows.

Step 2: If Indexing begins in first pass pages, it is crucial that changes to content or pagination are relayed to the indexer so the final index is accurate. Indexers can receive PDFs of pages to index from.

TASK: Proof Distribution

Step 1: In-house PM/liaison receives notice from FSA or compositor's CSR that 1st-pass pages have been either:
posted to PAL-Projects or a designated FTP site
OR
posted for DPC so printed copies can be shipped to participants.

Step 2: In-house PM/liaison records actual date in PIMS for start of 1st-pass pages in the Higher Ed Status Form schedule.

PIMS

12/05/2007 06:52 PM

PH HIGHER Ed STATUS

DATE:
 AUTHOR: Fernandez
 TITLE: Illustration for the Fashion Designer:
 EDITION: 1
 ISBN: 0131119117

Overall Comments:

TEAM

FSA Contact:
 PH PM/Buyer:
 PH Production Editor:
 PH Managing Editor:

DATES

Most current Disk to printer:
 CIP Complete:
 Perms Complete:
 RSP Test to Printer:

03/01/2007

Printing No.

PAGE COUNT

Pink Sheet: 352
 Estimated: 352
 Actual: 336

BUDGET

Ms received in production Start
 Ms received in production End
 Materials to PH
 Manuscript to FSA
 Bids due from FSA
 Cost/Estimate due
 Launch Meeting/Launch Memo completed
 Pink Sheet to PM/Buyer for Costs
 Pink Sheet Budget circulated
 Pink Sheet Budget approved
 Final Budget/RSP Form circulated
 P&B Request due PM/Buyer

LAUNCH

REVISED

ACTUAL

05/01/2006	03/01/2006	06/15/2006
05/01/2006	03/01/2006	06/15/2006
		10/13/2006

BUDGET STATUS

COVER

Front & back cover copy due design
 Mechanical due
 Mechanical approved
 First Cover files due printer
 Last Cover files due printer
 Cover printer proof due PH
 Cover printer proof approved
 Covers due bindery

COVER STATUS

DESIGN AND SAMPLE PAGES

Design layouts due PH
 Design Concept approved
 F/EM design due
 Sample pages due PH
 Sample pages approved

DESIGN AND SAMPLE PAGES STATUS

TEXT

Start ms/disks due copyeditor
 End ms/disks due copyeditor
 Start copyedited ms due author
 End copyedited ms due author
 Start copyedited ms due FSA
 End copyedited ms due FSA
 MS to Keyboarder Start
 MS to Keyboarder End
 Keyboarder files to comp
 Permissions final
 Start ms/disks due compositor
 End ms/disks due compositor

10/18/2006	10/24/2006	10/24/2006
11/22/2006	12/18/2006	12/19/2006

TEXT STATUS

1ST PASS PAGES

Start pages due FSA
 End pages due FSA
 Start pages due comp
 End pages due comp

11/03/2006	11/09/2006	11/15/2006
12/12/2006	12/18/2006	12/19/2006

2ND PASS PAGES

Start revised pages due FSA
 End revised pages due FSA
 Start revised pages due comp
 End revised pages due comp

FINAL PASS PAGES

Start final pages due FSA
 End final pages due FSA
 Start final pages due comp
 End final pages due comp

12/07/2006	12/19/2006	12/19/2006
01/16/2007	01/25/2007	01/25/2007

FRONT & REAR MATTER

Step 3: In-house PM/liaison notifies all participants that 1st-pass pages have been either:
posted to **PAL-Projects** or a designated FTP site
OR
shipped to designated participants.

Step 4: In-house PM/liaison includes author alterations (AA) caution in transmittal memo for first batch of 1st-pass pages.

Step 5: In-house PM/liaison sends original copyedited manuscript to proofreader. Original copyedited manuscript always travels with original (master) 1st-pass pages, whether a Word file or hard copy.

Best practice is to copy edit manuscript electronically.

Step 6: In-house PM/liaison includes due date for return of each batch of 1st-pass pages in transmittal memo.

NOTE: It must be clear that the due date is a received-by date, not a ship date, so that the participant can plan adequate time for shipping if necessary.

Step 7: In-house PM/liaison provides copies of design layouts, Quark style sheets, page makeup guidelines, and editorial style sheet to proofreader. (See: Design Submittal to Comp).

Step 8: In-house PM/liaison records actual date in PIMS for end of 1st-pass pages to PH in the Higher Ed Status Form schedule.

TASK: Proofreading

Step 1: Proofreader reads 1st-pass pages *word for word* against original, copyedited manuscript.

Step 2: Proofreader checks page makeup against design layout, Quark style sheets, and page makeup guidelines as appropriate.

Step 3: Proofreader returns annotated PDFs or marked-up hard copy to in-house PM/liaison, along with the original, copyedited manuscript.

TASK: Author/Developmental Editor (DE)/AE/PMEd Review

Step 1: Author receives original, copyedited manuscript for reference when checking PDF files or hard copy of 1st-pass pages.

Step 2: Author reads pages and annotates PDFs or marks up hard copy.

Step 3: Author makes copy of marked-up hard copy and original, copyedited manuscript for personal records if desired.

Step 4: Depending on established workflow/routing plan, author forwards annotated PDFs or marked-up hard copy to either DE/AE/PMEd or directly to In-house PM/liaison.

Step 5: If forwarded to DE/AE/PMEd, he/she checks author edits/corrections and includes own edits/corrections as appropriate.

Step 6: DE/AE/PMEd either:
posts annotated PDFs to PAL-Projects or designated FTP site and notifies In-house PM/liaison that annotated PDFs have been posted
OR
ships marked-up hard copy to In-house PM/liaison.

TASK: Accuracy Check

Step 1: Accuracy Checker (AC) reviews 1st-pass pages following instructions provided by In-house PM/liaison.

Step 2: AC either:
posts annotated PDFs to PAL-Projects or designated FTP site and notifies In-house PM/liaison that annotated PDFs have been posted
OR
ships marked-up hard copy to In-house PM/liaison

NOTE: In-house PM/liaison can instruct AC to send pages directly to author if schedule is tight. Author compiles any necessary edits/corrections onto master pages.

TASK: Compiling Edits/Corrections onto 1st-Pass Pages

Step 1: In-house PM/liaison reviews all marked sets of 1st-pass pages to ensure edits/corrections are clear and queries to authors have been answered.

Step 2: In-house PM/liaison compiles all edits/corrections from marked sets into the proofread, master set of 1st-pass pages (either as annotations to proofreader's PDFs or notes on hard copy proofs).

Step 3: In-house PM/liaison photocopies master proofread pages if workflow is hard copy.

Step 4: In-house PM/liaison returns one set of annotated PDFs to compositor via PAL-Projects or designated FTP site or ships marked master set of pages to compositor.

Step 5: In-house PM/liaison records actual dates in PIMS for start and end of 1st-pass pages to comp. on SCHEDULE >Overview tab or PH Higher Ed Status Form in PIMS.

PRODUCT	PRODUCTION	DESIGN	VISUAL	TEAM	SCHEDULE	BUDGET	MANUFACTURING	MEDIA	REPRINTS	PO
• Overview • Create/Modify Schedule • Schedule Details • Vendor Schedule • Product Summary Printing No. 1 <input type="button" value="Go"/>										
PUB MONTHS		PUB WEEK		WAREHOUSE RECEIVE DATE			ESTIMATED SHIP DATE			
				04/18/2007						
	PLANNED	REVISED	ACTUAL		PLANNED	REVISED	ACTUAL			
Instock/revised editorial/budgeted	04/20/2007	04/01/2007		Production launch meeting			10/13/2006			
Text ms to production - start	05/01/2006	03/01/2006	06/15/2006	Text ms to production - end	05/01/2006	03/01/2006	06/15/2006			
Last batch of final photo selections to researcher				Line art pages to production - end						
First batch of ms to compositor	10/18/2006	10/24/2006	10/24/2006	Last batch of ms to compositor	11/22/2006	12/18/2006	12/19/2006			
First pages to production - start	11/03/2006	11/09/2006	11/15/2006	First pages to production - end	12/12/2006	12/18/2006	12/19/2006			
Final pages to production - start	12/07/2006	12/19/2006	12/19/2006	Final pages to production - end	01/16/2007	01/25/2007	01/25/2007			
Final files/film/camera copy to printer - start	02/09/2007	03/01/2007	03/01/2007	Final files/film/camera copy to printer - end	02/09/2007	03/01/2007	03/01/2007			
Bound book	03/16/2007	04/13/2007	04/13/2007	Instock/live date	03/23/2007	04/20/2007	04/18/2007			
Note: Actual Bound Book Date is PO delivery date ESTIMATED vs ACTUAL DAYS: 26 (Negative = days early, Positive = days late)										
SPECIAL SCHEDULE REQUIREMENTS				CONCEPT MEETING <input type="text"/> PINK SHEET ROUTING <input type="text"/> PRICE APPROVED <input type="text"/>						
SCHEDULE COMMENTS				As of 3/9/05, this project is still out for reviews. This manuscript was sent back to the author. It needs additional organizational structure. Sent back 8/30/05. Revised files-to-printer date due to heavy author alterations.						
<input type="button" value="save"/> <input type="button" value="reset"/>										