# 21—Project Closeout (PM17)
Forms and Support Documents available at: http://phheproduction.pearsoned.com


*Why: Closeout is needed to formally close production on each project, archive documents, and prepare for reprints and next edition.*
*Who: In-house PM/Liaison; FSV PM*
*Skills Needed: Basic editorial production*
*Knowledge Base Needed: Microsoft Word, Microsoft Excel, Adobe Acrobat*

Materials for closeout tasks should be sent to the in-house PM/Liaison no later than 2 weeks after in-stock date. In-house PM/Liaison should complete Vendor Scorecard within 4 weeks of in-stock date, after closeout tasks by FSVs are completed.

Project closeout consists of:
- o  Text permissions folder
- o  Rights Notice
- o  Inspect/accept advance copy
- o  Advance copy/reprint instructions to author(s)
- o  Reprint corrections to Reprint Department
- o  Vendor Scorecard
- o  Disposition of AAs
- o  Archive project specifications/logs/paperwork
- o  Archiving composition files
- o  Text extract/next edition preparation packet


**TASK: File Text Permissions Folder**
**Step 1:**  The in-house PM/Liaison compiles all text/line art permissions and the corresponding permissions log and ensures completeness prior to files going to printer. (see Permissions Plan [PM8]).

**Step 2:**  The in-house PM/Liaison reviews the permissions log to identify any final permission restrictions for related products and annotates the same.

**Step 3:** The in-house PM/Liaison notifies **MPM** or the Central Media Group of any restrictions.

**Step 4:**  If FSV PM sends the complete permissions forms with corresponding Permissions Log and the completed Rights Notice to the Liaison to file.

**Step 5:** The in-house PM/Liaison arranges for payment of permission fees and charge-backs to author royalties by preparing the Royalty Check Requisition form and issuing POs.

**Step 6:** The in-house PM/Liaison files the permissions folder in the business unit's permissions files. Folder should be labeled with ISBN, author name, title, and edition.

## TASK: Distribute Rights Notice

**Step 1:** The in-house PM/Liaison receives the Rights Notice from the FSV PM The Rights Notice summarizes the rights acquired for text and images and indicates any restrictions for translations or distribution.

**Step 2:** The in-house PM/Liaison emails the Rights Notice to International with a copy of the permissions log file (if applicable).

**Step 3.** The in-house PM/Liaison uploads a copy of the Rights Notice to PAL Projects.

## TASK: Inspect/Accept Advance Copy

*NOTE:* An advance inspection copy is reviewed by the **OS** for manufacturing quality. The **OS** routes the advance copy to the in-house PM/Liaison with a Bound Book Approval Form.

**Step 1:** The in-house PM/Liaison reviews the inspection copy for all items listed on the Bound Book Approval Form. This review is primarily for print and bind quality and accuracy (completeness and order of signatures).

**Step 2:** The in-house PM/Liaison notes on the form any problems with printing and binding. If a serious problem is found (such as missing signatures, poor binding, scratched covers, and the like), the in-house PM/Liaison must discuss the problem with the **OS** and notify the **SME.**

**Step 3:** The in-house PM/Liaison routes the inspection copy with the form to the **SME**, who should take note of any problems listed on the form and ensure that they are being addressed. The **SME** should also do his/her own review of the inspection copy for quality.

**Step 4:** The **SME** returns the inspection copy and signed Bound Book Approval Form to the **OS**.

**Step 5:** The in-house PM/Liaison confirms that all items have been included in PAL Projects.

**TASK: Vendor Scorecard**
The Vendor Scorecard is used to track vendor performance as well as individual performance by vendor employees and freelancers for each parent title.  This tool allows quantitative analysis of performance along with detailed information that supports the data.  Scorecard results will be shared with vendors as the need arises, and will be the basis for annual Operations/vendor meetings.

**The Vendor Scorecard should be filled out no later than 2 weeks after the title is declared instock.**

**Step 1:** The In-house PM/Liaison rates each vendor's performance on a variety of prepress tasks on a scale of 1-5 using the online scorecard found here:  http://usheproduction.pearsoned.com/project_mgmt/index.cfm .
 (see new link "P&C PrePress Vendor Scorecard Form").

The online Scorecard
(
http://usheproduction.pearsoned.com/project_mgmt/scorecard/scorecard_form.cfm) builds an online master Excel file of responses that can be downloaded.  This  Excel file will be the basis for comprehensive analysis of vendor performance.  Vendor Scorecards that have been previously completed are being imported into the online master Excel file at this time.

It is important to fill out all of the data fields, following the instructions on screen.

A rating must be selected for every prepress service. The rating = 0 (zero) if the service was not provided.

If a service is rated below 3 (acceptable) include a brief comment describing issues with service.

If a service is rated 5 (excellent) include a brief comment describing significantly higher level of performance.

A comment regarding overall vendor performance can be included at the bottom of the screen.

**Step 2:** Submit the Scorecard by clicking the **"Submit"** button at the bottom of the page.  When the Scorecard is submitted the data feeds into the master Excel file.  An email is sent to the managing editor and the operations confirming that the Vendor Scorecard has been completed.

**Step 3:** The In-house PM/Liaison puts a note in **PIMS** on the **Product Tab/Comments Field** as follows: "Vendor Scorecard completed [date] [PM initials]".

The **Operations Specialists** will have their own Vendor Scorecard for each project, and they will complete them according to their own directives.

### TASK: Disposition of Author Alterations

*NOTE:* During the analysis of the FSV's final invoice, the **OS** identifies titles where author alterations or editorial alterations (those requested by PH only) exceed 10 percent (the standard contract allowance). The **OS** prepares a [Composition Invoice Summary](#) form and attaches a copy of the final composition invoice to it before routing to the in-house PM/Liaison. No form will be routed if the alterations fall below 10%.

During production, the FSV PM should have notified the in-house PM/Liaison of suspected AA overages. It is the responsibility of the AE and the inhouse PM/Liaison to let the author know that AAs are running high and may exceed the contracted allowance (the FSV PM should not have this conversation with the authors). All backup materials should be kept by the FSV whenever AA overages are suspected (page proofs for all rounds showing AA clearly marked and documented).

**Step 1:** The in-house PM/Liaison reviews the [Composition Invoice Summary](#) form and prepares the [Disposition of Author Alterations](#) form, which breaks down the information further and gives an opportunity to explain the overages.

**Step 2:** The in-house PM/Liaison routes the Composition Invoice Summary form, a copy of the final composition invoice, and the Disposition of Author Alterations form, starting with the AE, who approves the charge-back to author royalties or absorbs the costs. The OS receives the final forms to send to Royalties.

**Step 3:** After routing is complete, the final Disposition of Author Alterations is sent to the Royalties Department by the OS. Royalties charges the AA expense to the author's royalties.

*NOTE: Editorial alterations are absorbed by PH.*

### TASK: Archive Project Specifications/Logs/Paperwork
**Step 1:** The in-house PM/Liaison or FSV PM includes the following items with the archive files, which will be ingested into PAL Projects. Hard copies must be scanned to be placed into PAL Projects.

Copyediting style sheet*
Final design specs
Tagging Guidelines
Art style sheet
Memos or correspondence that might be helpful for future editions*
Sample pages
Art log*
Permissions log* - for photos not acquired by the IRC
Text permissions log
Latest PDR for permissions acquired by the IRC
Reprint Letter*
Job Archive Form

*\* The n-house PM/Liaison completes this step for \* this item when production management is done at Pearson.*

**Step 2:** The in-house PM/Liaison uploads the following items to PAL Projects (scanning any hard copy forms):
Author's contract
Approved RTP
Rights Notice
Additional memos or correspondence that might be helpful for future editions

### TASK: Archive Composition Files
All composition-related files for frontlist titles and reprints are archived in PAL Projects and evaluated for completeness. Vendors are penalized for incomplete or late archives. (see Archive Submission: Parent Titles [SD1]).

*NOTE: The AV log is archived with the composition files. The compositor should validate the AV log prior to archiving.*

### TASK: Text Extract/Next Edition Preparation Packet to Author(s)

*NOTE:* A text extract is prepared during the archiving process. The text extract is available approximately 3 weeks after the archive is approved. A monthly report of available text extracts is distributed to **OS** weekly.

**Step 1:** The SME retrieves the monthly report of available text extracts and distributes to his/her project management team (see 27-Next Edition Preparation [PM22]).