

Preceded by: 22-CourseSmart (PM7)

23-TestGen Workflow (PM19)

Followed by: 24-Reprint Planning (PM20)

Why: Workflow for creation of TestGens

Who: Project Managers

Skills Needed: Word, Excel, Acrobat, TestGen 7.4

Knowledge Base Needed: Basic project management skill set

There is a significant cost savings of approximately \$150,000 per copyright year to author all content in .bok-file format via Tamarack's TestGen software. Tamarack is willing and able to train our authors to work in .bok-file format. It is important to deliver this message to Editorial and advise them to contact Carol Schultz at Tamarack before authoring begins if they feel their author needs guidance/training (see "Introduction" for contact information).

INTRODUCTION

- o TestGens are electronic test banks (i.e., a bank of questions professors can access and modify in order to create tests for the classroom). The TestGen comes in three deliverables:
 1. **Electronic/online** format that is downloadable from our Instructor Resource Center online catalog (HEPM). .bok files are posted in .zip (PC) and .sitx (MAC) format (see Reference Document "TestGen_UploadInstrux" for further information).
 2. **Physical media** in the form of TestGen standalones* or Instructor Resource CDs/DVDs.
*CHET only
 3. **Printed version** called a Test Item File (TIF).
- o Tamarack Software is the developer of TestGen. Carol Schultz is the customer service representative (CSR):

Carol Schultz, Director of Marketing & Sales
Tamarack Software, Inc.
601 W. Golf Road, Suite 201
Mount Prospect, IL 60056
Tel 847-439-7795
Fax 847-439-7796
cschultz@tamarack-software.com

Tamarack ftp site for posting of final .bok files:

ftp://cmg014:gotMNq@cmgftp.pearsoned.com/Amadis/Tamarack/esm_sci/

TASK: Editorial/Authoring

Editorial contracts with an author to create a new set of TestGen questions. The desired number of questions and complexity is determined by Editorial through market research and feedback from professors and sales reps. Previously, it was common for first-edition TestGens to be authored in Word-file format. It is recommended as best practice going forward that the author work in the TestGen software and author in .bok format. For editions beyond first, the author should start with the previous edition .bok file. Using the TestGen software, the author can open the .bok file, view the previous edition's questions, make the necessary revisions and additions, and then save as a new .bok file.

NOTE: Editors can schedule a TestGen/.bok file tutorial (at no cost) for the author with Tamarack so they feel comfortable working in a .bok-file format (see "Introduction" for further details; see Reference Document "TestGen Manual" for authoring instructions).

TASK: Editorial/Accuracy Check

Accuracy check (i.e., content check), if deemed necessary by Editorial, occurs during the authoring process. The Editor will contract with an accuracy checker, who reviews chapters as author finishes authoring. Review goes back to author who will input changes before turning over final manuscript to Editorial. Editorial then releases the project to Production.

NOTE: Accuracy check should take place prior to release of manuscript to Production. Once manuscript is with Production, there should be an understanding that only Level-1 or -2 proofreading (for general grammatical errors and typos) will take place from that point on. If there is a question about discipline- or topic-specific issues, this needs to be addressed during accuracy check, prior to files being turned over to Production.

Proofreading

- o **Level 1:** *Description:* cursory check for general grammatical errors, typos, proper numbering of questions, and errant characters in .bok files. *Cost:* Included in cost of Tamarack's standard costs and fees.
- o **Level 2:** *Description:* Advanced Level-1 proofreading for material that requires extra attention. Detailed check for general grammatical errors, typos, proper numbering of questions, and errant characters in .bok files. *Cost:* An additional \$25/hour in addition to Tamarack's standard costs and fees.

TASK: Release to Production/Launch

Step 1: Release of Project Materials to Production/Quality Check. Project Manager (PM) receives Release to Production Form (RTP) and .bok files from Editorial. PM will do a quality check of materials, confirming the total number of questions with the Editor and verifying all questions are present in the .bok files. The PM will also confirm with Editorial if art is included in the project, and then verify at this point that art is included in the supplied files. If Editorial needs the PE to locate art for placement and/or modification by Tamarack, the PM should take measures to locate the necessary art in PAL at this time.

Step 2: Costs and Schedule/Launch. PM fills out a Purchase Order Form (POF) and submits to Tamarack with a proposed schedule (see Reference Document "POF"). Tamarack will confirm costs and schedule. PM will issue a purchase order (PO) for the agreed upon costs and then turn materials over to Tamarack. Project is then launched per PHHE Production standards.

TASK: TestGen Creation

Step 1: Proofreading/Query Report. Once Tamarack receives all content (questions and/or art), Tamarack will review and perform Level-1 (or Level-2, if requested) proofreading of the material. In 2–3 weeks, Tamarack will send the PM a query report that is then forwarded to the editor. All replies to the query report are due back to the PM within 2–4 days. Once all queries are answered and received at Tamarack, corrections will be implemented within the .bok files.

Step 2: After all queries have been addressed and all corrections are entered into the .bok files, Tamarack will send the PM a content verification copy (CVC) in PDF format so that the content to appear in the TestGen can be approved. The PDF goes to the Editor, and he/she has 1-2 days to return comments/corrections/approval to the PM. The PM then notifies Tamarack of the Editor's findings. At this time, the PM will also have the Editor fill out a CRC Checklist (see Reference Document "CRCChecklist"). The PM will turn this over to Tamarack at this time. (Note: A CRC checklist allows Editorial to choose what template/format they would like for their questions, and ultimately the TIF, if applicable.)

Step 3: Within 1 week of CVC review, Tamarack will supply a CRC to the PM in PDF format. The CRC will have all TestGen content in the format requested by the Editor through the CRC Checklist. This goes to Editorial for final approval. If last-minute corrections are requested by Editorial, they should be addressed immediately.

TASK: End of TestGen Creation Based on Deliverable

NOTE: Starting on 11/1/07, the Physical Media/Gold Master is no longer an option for all disciplines with the exception of Career, Health, Education and Science. All TestGens will be available via the IRC (Catalog Download). See Catalog Download procedures for reference.

Physical Media Deliverable

Standalone (Career, Health, Education and Science only)

1. The assigned PM will follow the production steps outlined previously, with one additional step: silk and label design. PM will create a silk and label design using Quark templates. Silk and label are routed through E-RAP until approved by Editorial.
2. After the CVC is approved, Tamarack will send the PM 2 Gold Masters (GM) within 1 week. [**Note:** Testing through CMG is not required.] One GM goes to the Operations Specialist for duplication, along with the approved silk and label. The second GM is used for archiving.

For inclusion on an Instructor CD/DVD

1. The assigned PM will follow the production steps outlined previously.
2. After the CVC is approved, Tamarack will send the PM 2 Gold Masters (GM) within 1 week. One GM is to be used toward the build of the IRC CD/DVD; one for archiving.

Printed Deliverable

1. The assigned PM will follow the production steps outlined previously.
2. If anything is to reside on a media product (which should have been determined at the launch), the PM will obtain needed materials from Tamarack and transfer them to the appropriate Media PM(s).
3. If the CRC is approved by Editorial, the PM will use that PDF as the final file. If the CRC required changes per Editorial, a new CRC will be provided by Tamarack within 3 days of requested changes. The PM will then verify changes and use that PDF as the final file. If Editorial requested Exported Word Docs for upload to the catalog page in edition to the PDF for TIF, PM should get these from Tamarack and perform the upload.

Electronic/Online Deliverable

1. The assigned PM will follow the production steps outlined previously.
2. Once the CRC is approved, Tamarack will work to finalize the .bok file. When ready, Tamarack will post .bok file (in .zip and .sitx format) to their ftp site.
3. The PM will proceed in filling out and submitting the catalog upload form ("Catalog Resource Distribution Upload Form") online. Form is located at <http://phheproduction.pearsoned.com/media>.
4. Once the form is submitted, PHHE Media Production will download the .bok files and post to the IRC catalog page.
5. PHHE Media Production will send an email to the Inventory Manager advising that the title is now live and available via the IRC catalog page.

6. Inventory will coordinate with Cost Accounting for the standard cost of \$.01 to be entered in UOPS and the title marked as "AS" instock.
7. Once the title is marked as "AS" instock, PHHE Media Production will update PIMS accordingly.

Editorial Product Information

1. Editorial will continue to request an ISBN for the TestGen, but now as an Online Deliverable, and then coordinate with Production per standard procedure.
2. Product Information will set up the ISBN/title as merchandise type: virtual product (E), providing that the TMR is filled out correctly as an Online Deliverable.

TASK: Process for Legacy Titles

For inventory/backlist titles

Inventory managers will no longer process a reprint for any TestGen CD, with the exception of CHE and BC. Once all inventory is depleted, the process is as follows:

1. Inventory is to check the IRC catalog page by ISBN to ensure that the .bok file is posted to the IRC catalog page. (Note: 99% of TestGens have been posted since c/r 2005, but each upload of TestGen should be verified.)
2. If the .bok file is not posted to the IRC catalog page, Inventory should send an e-mail to Diane Hynes at Pearson Education and Carol Schultz at Tamarack (e-mail: cschultz@tamarack-software.com) immediately. If the .bok file cannot be located in PAL, Tamarack will locate the .bok file, post to their ftp site, and advise once posted. (Note: Tamarack will charge a \$10 fee per request.)
3. Once Tamarack posts the .bok, Media Production will download and post to the IRC catalog page, and then notify Inventory.
4. Once the .bok file is posted to the catalog page, Inventory will change the systems accordingly.
5. Inventory will change the date code in UOPS to "TBE" (to be electronic), which will change the product format from physical (F) to virtual (E) and feed to all systems accordingly.
6. For product that is under High School contract, TestGens will continue to be reprinted as needed, Inventory to manage accordingly.

TASK: On Demand Solution

There's an option for "On Demand" for those instructors who cannot download from the IRC catalog page. The "On Demand" fulfillment will be handled by Central Media Manufacturing and our preferred vendor: Lason, Inc. The process for On Demand is as follows:

Process for Central Media Manufacturing and Lason Inc.

1. The instructor and or sales rep will fill out the online request form that is located at <http://phheproduction.pearsoned.com/media>.
2. The online request form is sent via email simultaneously to Central Media Manufacturing and our preferred vendor, Lason, Inc.
3. Lason will receive the order, **download the .bok file from the IRC catalog page**, burn a CDR, package in our standard bind-in sleeve and ship to the appropriate destination.
4. Lason will ship via ground using Pearson's Fed Ex#.
5. CMM will simultaneously review all orders sent to Lason weekly and create a multi-title purchase order including each business unit cost center.
6. Lason will send a batch invoice weekly to Central Media Manufacturing to be processed for payment.
7. Upon receipt of the invoice, CMM will confirm receipt of product via Fed Ex email notification, attach the purchase order, and process for payment.

TASK: Closeout Based on Deliverable

Electronic/Online: Archived via the IRC catalog page.

Physical Media:

- o **Standalone:** TG Gold Master and silk/label source files to be archived via WDS/PAL.
- o **Instructor Resource CD/DVD:** TG will be archived via the IRCD/DVD. However, if the TestGen is created under its own ISBN, a Gold Master should be archived via WDS/PAL.

Printed Version: PDF from Tamarack, cover files, and exported Word docs (if applicable) should be archived via WDS/PAL.

Reference Documents

1. TestGen_UploadInstrux.doc
2. POF.xls
3. CRCChecklis.doc
4. TestGen Manual.pdf